

Attachment C



Statement of Work

Santa Barbara, CA
Cultivation Licensing
7/24/2018

Version 1.1

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DOCUMENT CONTROL

Date	Author	Version	Change Reference
7/12/2018	E Strang	1.0	SOW Creation
7/23/28	J Winkel	1.1	Updated pricing, dates and license number



INTRODUCTION

OVERVIEW

This Statement of Work ("SOW") dated 7/24/2018 sets forth the scope and definition of the project-based professional services (collectively, the "Services") to be provided by Accela, Inc., its affiliates and/or agents ("Accela") to Santa Barbara, CA ("Agency" or "Customer").

Capitalized terms not defined in this SOW are as defined in the Professional Services Agreement ("PSA") by and between Accela and Agency. In the event of any conflict between the PSA and this SOW, the terms of the PSA govern.

CRITICAL SUCCESS FACTORS

For Accela and Agency to successfully execute the Services described herein, there are several critical success factors to the service implementation project described in the Exhibits to this SOW (the "Project") that must be closely monitored and managed by the Accela and Agency stakeholders. These factors are critical in setting expectations between the Agency and Accela, identifying and monitoring Project risks, and promoting strong Project communication:

- **Accept Package Solution** – The Agency acknowledges that a standard package solution will provide end-to-end processing of an application or permit solution and may require some modifications to how the Agency conducts business today. These package solutions will allow for online processing, attaching documents, processing the application via a workflow, sending notifications based on workflow status, accepting payment, allowing to capture standard comments, and if required trigger inspections. The package solutions will allow the Agency to process their applications and/or permits.
- **Dedicated Agency Participation** – Agency acknowledges and agrees, throughout the duration of the Services, to have (i) its staff and/or agents ("Agency Personnel") actively involved in the Project, and (ii) its software, hardware and other technology performing (or available for performance), each as specified in the agreed upon Project Plan (such Agency Personnel and technology, collectively the "Agency Resources"). Accela will communicate insufficient participation of Agency Resources through Project Status Reports and will indicate actual and potential impacts to the Project Timeline. Accela will work the Agency's Project Sponsors and department leaders to determine appropriate team member involvement. This could range from full-time, during early analysis meetings, to part-time during the technical implementation phase. Please see [Appendix A](#) for a full description of Agency Resources.
- **Accela Implementation Methodology** – Agency acknowledges that it is willing to adhere to and will adopt Accela implementation's methodology. Please see [Appendix B](#) for a full description of the Accela Methodology.
- **Knowledge Transfer** – Agency Personnel must participate in the analysis, configuration and deployment of the Products for Accela to transfer knowledge to the Agency. Once Post Production assistance tasks are completed by Accela, Agency Personnel will assume all day-to-day operations of the Products, outside of Accela Support as specified in Accela and Agency's agreement for software, maintenance and support. Depending on the scope of the Project, key knowledge transfer areas could include:



- Configuration
- Scripting
- Batch scripts
- Interfaces
- Event Management Scripts
- Reports and Forms

PROJECT TIMELINE

The estimated term of this Project is 3 months for initial deployment. The estimated start date for the Project is thirty (30) calendar days after mutual acceptance and signature of this SOW (the “**Project Start Date**”).

This Project Start Date requires Agency to have all appropriate hardware, as applicable, on hand and available for use prior to such Project Start Date. A lack of hardware that delays the initiation of the Project beyond thirty (30) calendar days will result in an additional fee of \$15,000, which fee will be applied to Accela’s hosting of the Product environment for Agency until hardware is installed for the purposes of avoiding additional delays. Any such hosting fee will be billed upon determination that Accela hosting is needed.

Any other Agency-requested delay to start the project will require a forty-five (45) business day notice to Accela in order for Accela to resource the project. Accela cannot guarantee a Project Start Date until Accela resources are confirmed.

Upon initiation of these Services, the Accela Project Manager will work with the Agency to collaboratively define a baseline Project Schedule. As the Project Schedule is a working document that changes over the course of the Project, the Accela Project Manager will work closely with Agency to update, monitor, agree, and communicate any modifications.

In accordance with the PSA, any delays in the mutually agreed upon Project Schedule and/or estimated completion date that result from Agency challenges (by way of example: changes in Agency’s Project sponsor, Agency’s staffing level or availability of Agency Personnel, Agency-missed deadlines) will require a Change Order to reimburse Accela for the additional costs associated with such delay. Any such additional costs may include, but are not limited to, additional hours for Accela project management, deliverable development and/or review services. Please see Change Order details in the Assumptions section. Accela’s sample Change Order template is found in [Appendix D](#).

PAYMENT TERMS

PAYMENT SCHEDULE:

Accela will perform the Services on an hourly payment basis at a rate of \$250 per hour based on: (i) the nature and scope of the Services and associated Deliverables outlined in [Appendix E](#), (ii) the expected staffing requirements, (iii) the Project Schedule, (iv) Accela’s and Customer’s roles and responsibilities, and (v) the other assumptions as set forth in this SOW. The projects is expected to take 388 hour at a rate of \$250 per hour (the “**Hourly Rate**”); Accela’s total price to perform the Services and provide the Deliverables described in [Appendix E](#) is estimated to be \$97,000, exclusive of taxes and expenses. This estimated price



is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. Accela will not (i) exceed the total estimate amount without the prior approval of Customer and/or (ii) continue to provide Services, after the total estimate has been reached, without the prior authorization of Customer. Should there be changes to the scope, timeline or resources that increases the hours or costs needed to complete the Project, a Change Order may be required prior to project continuation. Please see Change Order details in the Assumptions section. Invoices will be sent for hours worked every two weeks.

Any estimated hours remaining on the Project when Accela has completed the scope or this project will not be used for other work without a Change Order delineating the scope. Any estimated hours remaining on the project when Accela has completed work will either terminate when the scope has been completed or expire on the term date of the Agreement, whichever is sooner.

EXPENSES:

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW will be billed to Agency, according to Accela expense policy. Accela will bill Customer for actual expenses incurred for travel and lodging/living, as well as other approved out-of-pocket expenses (such as mileage, parking, tolls and telecommunications charges). Accela will work with Customer to manage and control its expenses in accordance with Accela's global travel policy guidelines and will not incur expenses in excess of the initial contracted budget below without Customer's prior written consent. Expense receipts will be made available as requested by Agency. Total estimated expenses are based on past Accela engagement experience.

Based on the assumption that there will only need to be 4 onsite trips at an estimated \$2,500 each, the travel expense budget estimate is \$10,000. Should the customer require more onsite trips than the assumption above, a Change Order will be required prior to additional travel commencing to cover the cost of those additional trips.

CONTRACT SUM:

The total estimated amount payable under this SOW, as calculated from the above-mentioned fees and expenses, is \$107,000 including travel expenses and travel time.

The estimated fees for this SOW are predicated on the timely completion of Project milestones. However, should completion of milestones slip due to actions of Agency, and should this slippage result in material effort to Accela in excess of the hours provided for in this document, Accela will produce a Change Order at a rate of \$250/hr. for additional hours in support of the scope and deliverables contained herein. Any change order will need to be approved by both Agency and Accela. Change orders will need to be approved within three (3) business days of delivery to avoid a halt of work on the Project.

PROJECTS PUT ON HOLD:

It is understood that sometimes Agency priorities are revised requiring the Agency to place the Accela implementation on hold.



It is understood that sometimes Agency priorities are revised requiring the Agency to place the Accela implementation on hold. The Agency must send a formal written request sent to Accela in order to put the project on hold. A project can be on hold for up to 90 days without invoking the termination clause (see Services Agreement). After that time, Accela can choose to cancel the rest of the Statement of Work. To finish the project will require a new Statement of Work at new pricing.

PROJECT ASSUMPTIONS

GENERAL PROJECT ASSUMPTIONS

Scope and Timeline

- Scope of the Project is based on discovery sessions with Agency prior to the SOW development.
- Agency and Accela will review their responsibilities before work begins to ensure that Services can be satisfactorily completed and in the appropriate timeframe.
- Coding not specifically described in this document is the responsibility of Agency.
- "Go live" (system is in production) timeline assumes timely completion of Agency deliverables (including finalization of requirements / use cases / product catalog), availability of key Agency resources, and collaboration and availability of any third-party vendor resources. Late (per mutually agreed project plan) Agency deliverables may adversely impact overall implementation timeline.
- Overall project plan will be mutually agreed to by Agency and Accela project managers prior to final Configuration.
- Accela will provide the Agency with a Weekly Status Report that outlines the tasks completed during the prior week, the upcoming tasks that need to be completed during the following week, the resources needed to complete the tasks, a current version of the project plan, and a 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).
- The project schedule is managed using Microsoft Project. Should any tasks slip behind schedule ten (10) business days, Accela and Agency will escalate according to the Communication Plan in the Project Charter.
- Deliverables will be documented in Accela based templates using the Accela methodology. There is no stated or implied promise that deliverables will be of a specified page length or comply to Agency formatting requirements. Sample templates are available to Agency upon request.

Training

- Project assumes that a Train the Trainer approach will be taken during this implementation. The Trainer will train one user in the operation of the creation of products and operation of billing functions in Accela.

Testing

- Accela is responsible for testing the initial configuration of system
- Agency is responsible for writing any User Acceptance Test Scripts
- Agency is responsible for User Acceptance Test and System Integration Testing

Go Live and Go Live Support



- “Go Live” definition is that the Accela software is up and running in production. If an Agency moves to production, i.e. “Goes Live” it is deemed to have accepted the product (see “Acceptance” in Services Agreement) and will comply with any payment obligation for “Move to Production”, “Go-Live” and/or “Acceptance”. There may be post go-live issues that are being supported during this time; however any financial obligations the Agency may have to Accela based on “Go live”, commence on the date the software is available in production.
- Accela consulting resources will support Agency after “Go Live” until such time that Agency is transferred to support (typically within a calendar month).

Project Completion

- The project is complete once the transition to Accela’s support (CRC) has been completed. If applicable, the specific deliverable acceptance process and financial obligation for “transition to CRC” or “project completion” will commence on the date the transition to Accela’s CRC.

Acceptance

- For non-deliverable based payment agreements, at minimum, it is requested that Agency sign acceptance for a minimum of the major phases of the project typically: Initiation, Analysis, Foundation, Build, Readiness, Deployment (as specified in Appendix E). Each phase should be signed off prior to commencing work on the next phase. Accela respectfully requests prompt attention to the processing of all Deliverable Acceptance Forms, as adherence to this timely process directly impacts the ability to complete the project in the desired timeframe.

PROJECT RESOURCING ASSUMPTIONS

Agency Resourcing

- Agency will provide a dedicated Project Manager throughout the course of the implementation.
- Agency Project Manager will maintain primary responsibility for the scheduling of Agency employees and facilities in support of project activities. Estimated time commitments for resources are outlined in Appendix A.
- Agency has committed to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in the project plan associated with this SOW.
- Agency agrees during the Initiation Phase of the project to assign a single designated approver for each major project deliverable. The designated approver will be responsible for overseeing and/or directly participating in the design and development, as well as the approval, of the deliverable. Agency may make changes to designated approvers with written notification to Accela a minimum of one month before a deliverable is due.
- Agency will provide access to subject matter experts and decision makers in a timely fashion.
- Agency will commit project sponsors and all necessary stakeholders and SME’s during the project kickoff.
- Agency will commit all necessary SME’s and IT personnel during the requirements and design phase for the appropriate sessions as outlined by the Accela Project Manager during Kick-Off preparation.

Accela Resourcing



- Accela has assumed that project team will need to be on-site as appropriate and mutually agreed upon. Any additional on-site consulting will be at the mutual agreement of Agency and Accela Project Manager. All travel expenses incurred for on-site work are per the terms of expense reimbursement outlined above.
- Accela personnel will attend Agency executive steering committee meetings as needed.
- In the pricing, Accela has assumed the appropriate resourcing to ensure deployment success for the scope outlined. Significant additional support requested by Agency over this level of resourcing would necessitate a change order that could impact the cost of the project.
- Accela will provide a project manager for services throughout the implementation in order to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. To support the implementation of the Accela Automation software at the Agency, Accela will provide Project Management services throughout the project.
- Any additional worked hours over the hours or scope stated in the SOW will require a Change Order.

Third Party Resourcing

- Accela is not responsible for impacts to project timeline created by dependency on Agency third party consultants. Timeline changes will result in a Change Order for extension of Accela project resources caused by Agency third party consultant actions (including availability) resulting in additional time or scope.

PAYMENT ASSUMPTIONS

General

- Invoices are due net 30 of the invoice date.

Deliverable Payments

- While it is requested that the Agency signs a Deliverable Acceptance form to generate an invoice for Fixed Fee Deliverable payments, it is not required to invoice the Customer if the work has been completed.

ACCELA SOLUTION ASSUMPTIONS

General

- Agency will provide the necessary tools, accounts, and permissions that will enable Accela to access the Agency's internal network for the purpose of remote installation and testing. This access must be provided through industry standard tools such as Virtual Private Network (VPN). Failure to provide this access in a timely fashion will result in a project delay. Such a delay will result in a Change Order.
- Accela will implement the most current version of Accela Automation at the time of the contract signing.
- Agency will provide/purchase/acquire the appropriate hardware, software and infrastructure assets to support all required Accela software products in both support/testing and production environments as defined in the project schedule.
- For use with Accela Citizen Access, Agency 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.
- Agency is responsible for proper site preparation, hardware, software, and network configuration in accordance with Accela specifications.



- Accela will be responsible for implementing a functioning version of the application software at the Agency (assuming the Agency has installed the proper hardware, software, and networking devices).
- Agency will ensure that Accela resources have access to a Dev or Test version of the 3rd party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3rd party system.
- Agency will provide Accela with access to test and development environments for each Agency system that requires integration with Accela Automation.

Data Conversion and Document Migration

There is no data conversion and/or document migration in this scope of work

Out of Scope Items:

- No data conversion
- No mobility interface for inspections
- No code enforcement

ADMINISTRATION

LOCATION OF SERVICES AND KEY CONTACT

Services contracted under this SOW may be performed remotely and/or at the Agency's on-site facilities as deemed appropriate and reasonable for the successful completion of the Services detailed herein.

Please indicate below the primary Agency location which will benefit from the services covered under this SOW.

Work Location:

Please indicate below the key Agency contact that will be responsible for Project Management:

Name:

Title:

Phone Number(s):

Email:

CHANGE ORDERS

In order to make a change to the scope of Professional Services in this SOW, and subject to the Disclaimers below, Agency must submit a written request to Accela specifying the proposed changes in detail. Accela will submit to Agency an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Professional Services ("Change Order"). Accela will continue



performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees therefore. Any Change Order will be agreed to by the parties in writing prior to implementation of the Change Order. If Accela's effort changes due to changes in timing, roles, responsibilities, assumptions, scope, etc. or if additional support hours are required, a change order will be created that details these changes, and impact to project and cost (if any). Any change order will be signed by Accela and Agency prior to commencing any activities defined in the change order. Standard blended rate for Accela resources is \$250 per hour. The Change Order Template is attached hereto as Appendix D.

EXPIRATION

The scope and terms of this SOW must be executed as part of the Professional Services Agreement within sixty (60) calendar days of the date of this SOW. If the SOW is not executed then the current scope and terms can be renegotiated.

DISCLAIMERS

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

In the event Agency requires significant changes to this SOW (including cumulative revisions across any one or more Change Orders) which Accela reasonably determines (a) is a material modification of the nature or scope of Services as initially contemplated by the Parties under this SOW and/or (b) is significantly outside the Supported Modifications, Accela may, upon no less than thirty (30) days' notice to Agency, suspend or terminate this SOW and/or any Change Order issued hereunder. In the event of any such termination or suspension, the parties will work together in finalizing agreed-upon Deliverables.



ACCEPTANCE

Accepted By:

Accela, Inc.

DocuSigned by:
Brian Weber
 10D58FE7ACA14E6...

Authorized Signature

Brian Weber

Name - Type or Print

Director, Delivery - South West

Title

8/3/2018

Date

Accepted By:

Santa Barbara, CA

Authorized Signature

Name - Type or Print

Title

Date

APPENDIX A: PROJECT RESOURCES

AGENCY RESOURCES

Agency must fill the appropriate roles with the appropriate Agency Personnel that will work together with the Accela Project Team for the Project. Agency will make available additional resources as needed for the Project to be successful. Agency roles can be filled by the same person. In addition, Agency will provide all necessary technical resources to make appropriate modifications within any Agency systems wishing to integrate with any Accela systems. These resources must be proficient in Agency coding/development environment and tools, to make the required changes to their software to enable integration and must be available during the timeframe of these Services. Agency roles include Sponsor, Project Manager, Technology Manager, and Business Lead(s) for each Division/department being implemented, Super User trainers, and others as appropriate.

Agency Resources	Description	Hours per week Implementation Estimate	Hours per week Support Estimate
Project Sponsor	Responsibilities include: <ul style="list-style-type: none"> • Ultimate responsibility for the success of the project, • Creating an environment that promotes project buy-in, 	2 Hours* (*Might be higher during initiation)	2 Hours



	<ul style="list-style-type: none"> • Driving the project through all levels of the agency, • High-level oversight throughout the duration of the project, • Serving as the primary escalation point to address project issues in a timely manner. 		
Project Manager	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Overall administration, coordination, communication, and decision- making associated with the implementation; • Planning, scheduling, coordinating and tracking the implementation with Accela and across departments within the agency; • Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track. 	40 Hours	10 Hours
Division/Departmental Subject Matter Expert (SME)	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Being trained on the Accela Automation system at a System Administration level; • Being fully engaged in the Business Analysis and system configuration activities; • Assist internal efforts towards the creation of reports, interfaces & conversions; • Assist in the review and testing of the system configuration; • Actively participate in the full implementation of the Accela Automation solution. 	2 Individuals, 16 Hours	40 Hours
Technical Lead	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Primary responsibility for the technical environment during the software implementation; 	40 Hours	5 Hours



	<ul style="list-style-type: none"> • Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards; • Work with Accela technical personnel during implementation; • Maintain test and production databases; • Perform day-to-day maintenance of the system and install maintenance releases; • Act as the primary technical resource for troubleshooting problems; • Establish and maintain backup, archival, and other customary maintenance and housekeeping activities. 		
Report Developer	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Understanding reporting needs of Agency • Ability to write or amend reports as the Agency's report needs grow 	40 Hours during reporting phase of project	20-40 Hours

ACCELA RESOURCES

Accela will assign key Professional Services resources for the Project. Accela 's Project Manager will be responsible for the coordination of the Accela services team and its interaction with key Agency Resources assigned to the Project. The main roles are as follows:

Accela Resources	Description
Project Executive	The Project Executive oversees the project's progress/direction and works with the Project Manager to ensure efficiency, consistency and quality in delivery of Accela implementations. The Project Executive actively participates in a project director/executive role. The Project Executive will meet with Agency Executives monthly or upon request throughout the duration of the project.



<p>Project Manager</p>	<p>The Accela Project Manager is responsible for the overall project management and works directly with the client throughout all aspects of Accela implementations: from the initial scoping, planning, staffing to delivery. The Project Manager undertakes the project administration tasks including:</p> <ul style="list-style-type: none"> • Project plan management, • Change order management, • Issue log management and escalation, • Status reporting, • Project workspace management, • Resources management, • Work plan management, • Meetings management, • Project review with Project Executive. <p>In addition, the Project Manager will actively participate in leading the System Configuration Analysis sessions and will be responsible for the creation of the System Configuration Document.</p>
<p>Senior Implementation Consultant</p>	<p>The Senior Implementation Consultant assigned to the project will have major experience in the business process as well as the product functionality and is responsible for:</p> <ul style="list-style-type: none"> • Business analysis activities: Mapping the client’s business processes and requirements to the functionality of Accela’s products and the creation of solution design, • Leading system configuration activities, • Providing training/mentoring to agency staff, • Recommend industry best practices to agency to enhance business processes, • Guide agency on how best to configure the system based on past experiences and software expertise.
<p>Implementation Consultant</p>	<p>Implementation Consultant resources support the project and typically focus on the following tasks.</p> <ul style="list-style-type: none"> • The configuration of the system to match the System Configuration document. • Build activities within the project, such as conversion data mapping, creation of reports and interface specification.
<p>Technical Consultant</p>	<p>Accela Technical Consultants are involved in all areas that require knowledge o server-side considerations and Accela add-on products such as:</p>



	<ul style="list-style-type: none">• Application installation and setup (Accela Automation, Accela GIS, Accela Wireless, and Accela Citizen Access),• Report definition and creation,• Event Manager Script definition and programming,• Database Conversions and data mapping assistance,• Interface specifications and development.
Training Consultant	Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.



APPENDIX B - ACCELA IMPLEMENTATION METHODOLOGY

Accela's Delivery team will apply the following standard methodology throughout the life of the Agency's implementation. This is a proven methodology that provides the agency with an understanding of their solution on day one of the project by leveraging the standard package solutions. As the project progresses through the four stages, there are key checkpoints where the Agency will gain a better understanding of their solution at a point in time. The key component of the methodology is having the Agency see their solution come together. This approach will allow for some iterative steps that will assist the Agency in understanding impacts to their decisions. This methodology is based on existing or pre-configuration solutions for an off-the-shelf product that will allow the Agency to maintain the solution post go-live. It's important for the Agency to adopt the new solution, have their staff become familiar with how the system will work for their business process, but to understand that overtime the solution can evolve as the Agency implements standard practices or business changes.

Day one begins the knowledge transfer and the importance of following the four key stages of the methodology.

1. Define → 2. Refine → 3. Develop → 4. Deploy

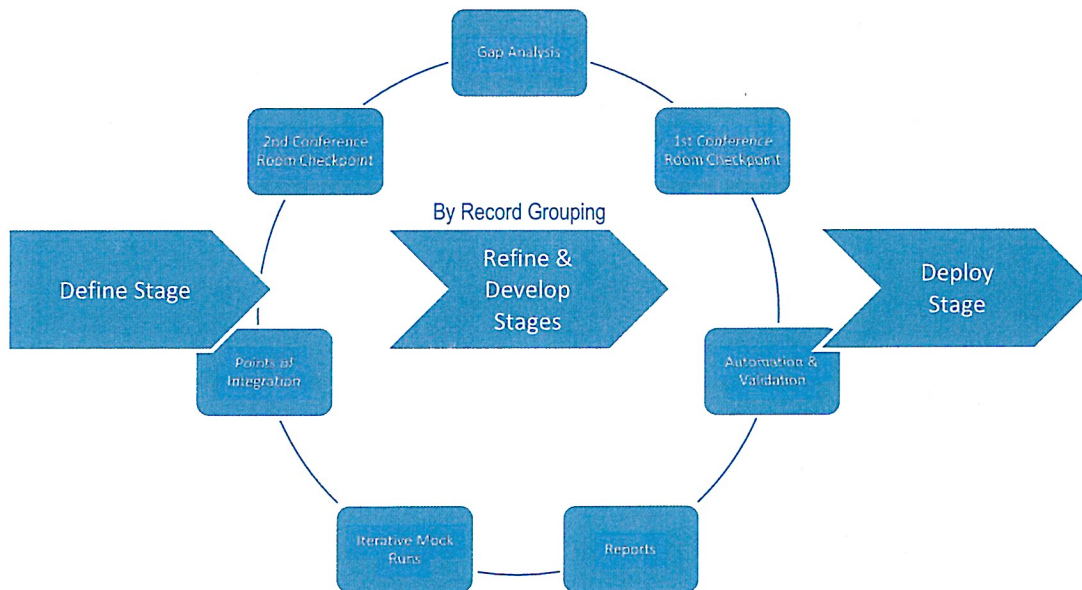


Exhibit 1: Accela's Implementation Stages

The first (Define) and last (Deploy) stages of project delivery flow in a linear direction, then the second (Refine) and third (Develop) stages have a more iterative approach to deployment. The Delivery team will determine record groupings based on similar processes, each group will start with Gap Analysis and move through the Refine and Develop Stage of the methodology. This allows for smaller data-sets to be developed, enterprise interfaces developed in the first iteration, and conversion to start early. Each stage has pre-defined objectives, tasks and deliverables.



APPENDIX C – DELIVERABLE ACCEPTANCE FORM

Please acknowledge acceptance by:

<p>A</p> <p>Sign and fax this document to:</p> <p>Accela, Inc. YOUR NAME YOUR TITLE Tel: Fax:</p>	<p>OR</p>	<p>B</p> <p>Email this document as an attachment to:</p> <p>YOUR EMAIL</p>
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Date:	
Agency Name:	
Approving Agency Manager:	
Accela Manager:	
Project Name / Code:	
Contract / Agreement #:	

Agency agrees that Accela has successfully completed the following Deliverables:

Deliverable #	Source / Reference Details	
	Service Agreement	

Agency agrees that Accela has successfully completed the Deliverables described above in accordance with the terms of the related Contract/Agreement.

APPROVALS:

Agency Name

Signature

Title

Date



APPENDIX D – CHANGE ORDER

SAMPLE CHANGE ORDER – PAGE 1

Agency: _____ CO #: _____
Project Code: _____ Date: _____
Contract #/ PO #: _____
Initiating Department: _____
Initiated By: _____
Change Category: Product Project Contract Maintenance

PROJECT CHANGE DESCRIPTION/TASK SUMMARY: 1. Log File Issue details / scope impact: • Schedule impact: • Resource impact: • Cost impact: 2. Issue details / scope impact • Schedule impact: • Resource impact: • Cost impact: Total Project Schedule Impact: Total Project Resource Impact: Total Project Cost Impact:

DISPOSITION COMMENTS:

Disposition: Approved Rejected Closed See Comments
Date: _____



SAMPLE CHANGE ORDER – PAGE 2

The above Services will be performed in accordance with this Change Order/Work Authorization and the provisions of the Contract for the purchase, modification, and maintenance of the Accela systems. The approval of this Change Order will act as a Work Authorization for Accela to perform work in accordance with this Change Order, including any new payment terms identified in this Change Order.

Accepted By: Agency	Accepted By: Accela, Inc.
By:	By:
Print Name:	Print Name:
Title:	Title: Director
Date:	Date:

	Accepted By: Accela, Inc.
	By:
	Print Name:
	Title: Sr. VP of Services
	Date:



APPENDIX E – DETAILED SCOPE

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

SET UP OF ACCELA MARIJUANA STANDARD SOLUTION CONFIGURATION

The Civic Platform subscription includes turn-key configurations in the specific domain of Marijuana Licensing Management. This solution includes all of the record types listed below and other items needed to conduct government business such as data items, inspections and workflow.

Accela Delivery resources will set up Standard Solutions for Marijuana Licensing per the existing data sheets. The following is a list of application, license and renewal record types that are included:

Marijuana Licensing Workflow
<p>Combo Cannabis Cultivation License An entity licensed to cultivate, process, and package medical AND adult-use cannabis, to deliver cannabis to cannabis establishments, but NOT to consumers license allows for the cultivation and harvesting of Adult-Use and Medical cannabis plants.</p>
<p>Combo Cannabis Cultivation License An entity licensed to cultivate, process, and package medical AND adult-use cannabis, to deliver cannabis to cannabis establishments, but NOT to consumers license allows for the cultivation and harvesting of Adult-Use and Medical cannabis plants.</p>
<p>Cannabis Business Registration Business Registration for businesses involved in a Cannabis Business</p>
<p>Cannabis Employee Registration Employee Registration for people involved in a Cannabis Business</p>
Automation and Validation
<p>Batch Renewal - About to Expire On a daily basis a batch job runs and looks for records that need to be set to About to Expire.</p>
<p>Batch Renewal – Notifications On a daily basis a batch job runs and looks for records that are set to About to Expire and sends notifications for specified periods before the License expires.</p>
<p>Workflow & Task Management Agency staff can track and manage the full lifecycle of licensing and renewals. This includes assignment and coordination with other required departments i.e. Code Enforcement</p>



Specifically Accela Delivery resources will:

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

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

Accela Delivery Responsibilities:

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

Agency Responsibilities:

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

SET UP OF AGENCY USERS

Accela Delivery will setup Agency staff users based on the number of software licenses purchased. Accela Delivery will deliver and discuss the Accela Roles and Functions Matrix document, and the Agency will indicate which user group role each staff is to be assigned. For example, if Agency purchases 15 Licensing Management Solution licenses, Accela Delivery will setup 15 named staff user login accounts.

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

Accela Delivery Responsibilities:

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

Agency Responsibilities:

- Provide timely and appropriate responses to Accela Delivery's requests for information.
- Arrange for the availability of appropriate Agency staff to provide a list of Agency user accounts and indicate which user group role the user is to be assigned.
- Agency staff must review the Accela Roles and Functions Matrix



- Agency staff must provide list of user accounts and indicate user group role feedback based on Accela Delivery and Agency agreed upon project plan timeline
- Schedule appropriate Agency staff participants and meeting locations for activities.

ADDITIONAL TASK WORKFLOW

Accela Delivery will provide up to **two (2)** distinct new workflow tasks to the existing workflow processes.

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

Accela Delivery Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Update the workflow processes and/or inspection checklist in the environment, based on the Agency feedback.
- Verify the updated workflow process based on Agency feedback.

Agency Responsibilities:

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

FEE SCHEDULE CONFIGURATION

The Agency can request up to **five (5)** new fee items per license type configured during the project implementation. Accela Delivery will configure each unique fee items based on the inherent fee formulas in the Civic Platform, which include flat fees, fees based on a specific range and using fee indicators. Examples include fee calculations based on the number of employees or a square footage fee for a building. Advanced fee item setup, such as automating a fee calculation using the advanced script engine logic is an additional cost and Accela Delivery team can scope the level of effort as a separate deliverable item and may result into a Change Order.

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

Accela Delivery Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with Accela Standard Solution worksheets
- Configure new fee items using Agency unique fee descriptions and the inherent fee formulas in the Civic Platform, based on Agency feedback



- Verify the new fee items configured in environment, based on Agency feedback.

Agency Responsibilities:

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

NEW AGENCY DEFINED DATA FIELDS CONFIGURATION

The Agency can request up to **five (5)** new agency defined data fields per license type configured and associate the data elements to specific record types to ensure information is tracked according to the Agency business process and municipal reports, such as Number of Sinks or Accessible Ramp Degree Incline. Accela Delivery will configure each new agency defined data field using one of nine (9) data types: text, date, y/n radio button, number, dropdown list, comment text area, time, money or checkbox.

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

Accela Delivery Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide the Agency with the Accela Best Practice Template Datasheet documents
- Configure up to thirty (30) new agency defined data fields and associate the data elements to the specific record types, based on Agency feedback
- Verify the new agency defined data fields configured in environment, based on Agency feedback.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela Delivery's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Accela Standard Solution Worksheets
- Agency staff must provide a list of the new agency defined data fields to Accela Delivery, which include data field label, data field type, flagged as required, available in Citizen Access, indicate which service record type to associate to, etc., based on Accela Delivery and Agency agreed upon project plan timeline
- Agency staff must review and test all agency defined data fields configuration and provide feedback to Accela Delivery based on the agreed upon project plan timeline
 - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*



- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

EXISTING USER GROUP PERMISSION DISTINCT UPDATES

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

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

Accela Delivery Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Deliver and provide instructions on the Accela Roles and Functions Matrix document
- Configure up to ten (10) distinct updates to the existing user group permissions, based on Agency feedback
- Verify the updated user group permissions configured in environment, based on Agency feedback.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela Delivery's requests for information.
- Arrange for the availability of appropriate Agency staff to read through the Accela Roles and Functions Matrix document.
- Agency staff must provide a list of the user group permission updates (up to 10) to Accela Delivery, which include function name and identified role based on Accela Delivery and Agency agreed upon project plan timeline
- Agency staff must review user group configuration and provide feedback to Accela Delivery based on the agreed upon project plan timeline
 - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

CITIZEN ACCESS CONFIGURATION

This deliverable includes setup and configuration of the Agency municipal website branding, updating the section instructional text with agency language, including descriptive help instructions for specific agency defined data fields, or updating the online disclaimer text.

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

Accela Delivery Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.



- Setup Citizen Access branding by loading two (2) banner files provided by the Agency
- Verify the loaded citizen access branding, citizen portal pages and sections updated and payment acceptance in environment, based on Agency feedback.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela Delivery requests for information.
- Provide website branding files, which include the top and side banner
- Arrange for the availability of appropriate Agency staff to review the branding on Citizen Access
- Agency staff must review and test all Citizen Access configuration and provide feedback to Accela Delivery based on the agreed upon project plan timeline
 - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Staff participants have successfully read and completed the recommended online course content
- Schedule appropriate Agency staff participants and meeting locations for activities.

REPORT BRANDING AND LETTER CONTENT MODIFICATIONS

Reports are defined as anything that can be printed from the system, including but not limited to, reports, forms, documents, notices, and letters that the Agency wishes to print as identified during configuration analysis. The Marijuana Standard Solution has a set of reports and documents for the Agency to effectively use with Accela Automation.

Accela will brand documents/letters/reports per the specifications gathered in the beginning of the project. This includes any changes to the form letters provided in the Standard Solution where the Agency wants to make modifications to content. Changes to the report specifications after approval can negatively impact project progress and the overall schedule. Therefore, changes to the report specifications after approval requires an analysis by Accela to determine the level of effort required, and if a change order would be required to complete the work.

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Brand reports per specifications.
- Assist in the validation of the reports in test environment.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate key users and content experts to participate in the report development and validation activities.
- Request change order if changes to specifications are required.

INTERFACE – PAYMENT PROCESSOR

Accela will develop an interface between Accela Civic Platform and an Agency provided adaptor for Electronic Payments. Specifically, Accela will utilize/update the standard E-Payment adaptor to the system for **Accela Automation (Back-Office/Counter) payment processing**.

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



- Interface Specifications Document
- Demonstration of operational interface between Accela Automation and system in the development or test environment.

Accela Responsibilities:

- Work with Agency staff to develop interface specifications during configuration.
- Use an Accela web service or other tool to implement interface functionality based on the specifications.
- Assist the Agency with testing and debugging of the interface.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specification development and data mapping process.
- Review and approve the interface specification documents.
- Allocate the time for qualified personnel to test the interface for acceptance to ensure that the data populates successfully according to the interface specification documents.

DAILY BATCH INTEGRATION TO FINANCIAL MANAGEMENT SYSTEM

Accela will provide an interface between Accela Civic Platform and an Agency's Financial Management System. This will be a daily CSV file produced by the Accela Civic Platform and stored on a shared location to be hosted by the Agency. The implementation of the interface is dependent on the assistance of the Agency's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system.

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

- Operational Interface in the Development or Test environment

Accela Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions for a daily batch interface with Financial Management System.
- Work with Agency staff to develop interface specifications document.
- Use an Accela web service or other tool to implement the interface functionality based on the specifications.
- Build all aspects of the daily batch CSV interface that interact directly with the Accela Civic Platform.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Provide system and access to individuals to provide required details of system interface.



- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specification development and data mapping process.
- Review and approve the interface specification documents.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Work with Financial Management Software Data Source software to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3rd party system or Agency business processes.

CIVIC PLATFORM ADMINISTRATIVE TRAINING

Accela Delivery will provide instructor lead training via WebEx engagement for Agency staff that focuses on the administration, maintenance and augmentation of its Civic Platform configuration. The aim is to educate Agency resources on the Marijuana Standard Solution aspects of the Civic Platform in an effort to ensure the agency is self-sufficient.

Note: If the Agency would like additional training, the Accela Delivery team can scope the level of effort as a separate deliverable item and may result in a Change Order request.

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

- Access to Accela Success Community online training content
- Instructor lead Civic Platform Administrative Training (agenda provided) via WebEx engagement

Accela Delivery Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Provide Agency the Accela Success Community website, provide instruction on how to register and login, along with how to search for and find the online training content
- Coordinate with Agency and schedule the appropriate day/time and confirm the Civic Platform Administrative Training content outlined in the provided agenda.
- Provide Civic Platform Administrative Training Agenda training content
- Provide Agency the WebEx engagement information for the Civic Platform Administrative training

Agency Responsibilities:

- Provide timely and appropriate responses to Accela Delivery requests for information.
- Provide the Accela Success Community website to the staff users who will require the online training content.
- Ensure that users are proficient in using PC's as a prerequisite before accessing the online training content.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.
- Ensure that users have appropriate hardware/software for successfully viewing online video content.



- Ensure that users are successfully reading and completing the recommended online course content throughout project implementation.
- Schedule appropriate Agency staff participants and meeting locations for training activities.

CIVIC PLATFORM DAILY END USER TRAINING

Accela Delivery will provide instructor lead training via WebEx engagement for Agency staff that focuses on the daily end user activities, such as basic software navigation, record creation and updates, workflow progression, fee invoicing, and processing payments as it relates the Marijuana Standard Solution.

Note: If the Agency would like additional training, the Accela Delivery team can scope the level of effort as a separate deliverable item and may result in a Change Order request.

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

- Access to Accela Success Community online training content
- Instructor lead Civic Platform Daily End User Training (agenda provided) via WebEx engagement
- Accela Delivery will focus training content on the 2 – 4 record processes selected by the Agency

Accela Delivery Responsibilities:

- Provide timely and appropriate responses to Agency's requests for information.
- Provide Agency the Accela Success Community website, provide instruction on how to register and login, along with how to search for and find the online training content.
- Coordinate with Agency and schedule the appropriate day/time to deliver the Civic Platform Daily End User Training content outlined in the provided agenda.
- Provide Civic Platform Daily End User Training Agenda training content and focus on the 2 – 4 record processes identified by Agency
- Provide Agency the WebEx engagement information for the Civic Platform Daily End User training.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela Delivery requests for information.
- Provide the Accela Success Community website to the staff users who will require the online training content.
- Identify and provide specific Agency procedural details on 2 – 4 record processes in which Accela Delivery will teach for the instructor lead training session.
- Ensure that users are proficient in using PC's as a prerequisite before accessing the online training content.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.
- Ensure that users have appropriate hardware/software for successfully viewing online video content.
- Ensure that users are successfully reading and completing the recommended online course content throughout project implementation.
- Schedule appropriate Agency staff participants and meeting locations for training activities.



USER ACCEPTANCE TESTING (UAT)

This deliverable is comprised of the assistance Accela will provide to allow the Agency to accept that the solution meets the requirements. Accela will assist the Agency in the testing and validation of the solution and its readiness to be migrated to production for active use and will assist in transferring the solution and any required data from Support to Production.

Accela will provide of support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that the Agency devote ample time and resources to his effort to ensure that the system is operating per signed specifications and ready for the move to production. The testing effort will require a significant time investment by the Agency, and coordination of resources is critical. At this point in the implementation process, the Agency should test individual components of functionality of the solution (i.e., functional and/or unit testing), and also test to ensure that the interrelated parts of the Accela Automation solution are operating properly (i.e., integration testing).

Accela will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and facilitating completion of UAT. Accela will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. Accela will work with the Agency to develop a test plan and deliver sample test scripts, as well as an issue log to track the progress of testing.

If the Agency does not devote adequate time and staffing to UAT in order to completely test the solution, Accela may opt to postpone go-live at the Agency's expense. Accela will work diligently with Agency to ensure this does not occur and provide several opportunities for the Agency to add additional staff and time to this effort before recommending a postponement or delay.

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

- Resolution of issues resulting from Agency User Acceptance Testing
- Fully tested system that is ready to move to production for go-live

Accela Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Lead the Agency in up to 3 weeks of User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.
- Resolution of issues as a result of User Acceptance Testing activities.

Agency Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.
- Develop the User Acceptance test scripts.
- Utilize the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.



DEPLOY

After all, develop work has been completed, the system is ready for User Acceptance Testing (UAT), End User Training and Go-Live activities. The Agency will prepare for UAT and lead the UAT activities by executing test cases to validate the system is performing processes defined in the analysis sessions and the Accela team will support bug fixes as they are identified. At the completion of UAT, Accela and the Agency will conduct End User Training and the Agency and Accela will begin to prepare the cutover plan. Once training has completed, the cutover plan will be executed and the Agency will go-live on their Accela solution. Accela will support a period of time post production to address bugs that are identified. Then the Accela team will transition the Agency over to the Accela Customer Support team for on-going support. The exit criteria for the Deploy stage is an approved UAT Test Plan, completion of UAT, completion of End User Training, Go Live and Transition to Customer Support.

PRODUCTION SUPPORT

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

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

- Deployment support prior to moving to Production
- Setup of Integration points in Production
- Final Conversion run during cutover
- Accela Automation used in Production environment for Agency daily use

Accela Responsibilities:

- Provide on-site resources to support the move to Production effort.
- With assistance from the Agency, lead the effort to transfer the system configuration and any required data from Support to Production.
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production.

Agency Responsibilities:

- Provide technical and functional user support for pre and post Production Planning, execution, and monitoring.
- Provide timely and appropriate responses to Accela's request for information.
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.