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1 Executive Summary

Thank you for allowing RedMark the opportunity to respond to the City of Gainesville's RFP RFP NO. DODX-180049-GD for an Enterprise Permitting & Land Management Software.

Our implementation team will offer 'best practices' suggestions to the City throughout the project. Since Accela Civic Platform is workflow driven, City of Gainesville will have an efficient set of processes that City constituents will appreciate.

The city has already procured Accela's unlimited departmental site License for the following modules:

- ▶ Accela Civic Platform for Land Management (SaaS model)

In addition to the above mentioned modules, the city additionally procured the following Accela add-on modules:

- ▶ Accela Citizen Access
- ▶ Accela Mobile Office
- ▶ Accela GIS

This proposal will focus on the Services related to the implementation for the Accela Software solution that the City has acquired.

1.1 Accela Civic Platform Highlights

- ▶ **Manage unlimited Building Safety, Public Works Engineering, Planning, Fire, Water & Transportation.** The system allows you to easily create new application types and business rules to reflect the regulations of City of Gainesville.
- ▶ **Configured, role-based consoles** are targeted to specific agency roles, allowing end-users to view and query only the information they need to efficiently perform their duties.
- ▶ **Accela Workflow Engine** permits extensive configuration to match and enforce agency business processes, allowing agencies to track processes throughout its life cycle.
- ▶ **Event Manager Script Engine (EMSE) functionality** permits easily configured scripts to automate processes such as triggering pre-authored emails (depending on actions, inactions and time-related events) or calling external systems.
- ▶ **Maintenance with Scheduled Version Upgrades:** Accela has methodology in place where upgrades to its product are released twice a year for distribution to customers.
- ▶ **Strong User Community:** The Accela Community website enables customers to help each other + much more. National and regional Accela user groups discuss products, share tips, and network to take full advantage of the opportunities the affiliation provides

- ▶ **Unlimited Support:** Accela's Customer Resource Center (CRC) is available via phone, fax or online 7:00 a.m. – 9:00 p.m. EST. The CRC can also provide on-line, real-time assistance via WebEx. Self-Support tools include searching Accela's knowledge base.

1.2 Recommendations

- ▶ Consider bringing RedMark back, three to six months after going into production, for two weeks of additional Professional Services to audit, tweak, and refine the system. In our experience, system Users (whose training is specific to the requirements of this project), will quickly identify additional benefits once in production, that can be achieved via use of Accela Civic Platform that were not requirements within the original scope.
- ▶ Prior to contract signing, RedMark requests to work together with the City to define the Scope of Work (Statement of Work) and Project Plan.

1.3 Proposer's History

RedMark has served over 50 separate city, county and state agencies and their departments with Accela implementation services.

RedMark Technologies, LLC incorporated in the State of Florida in 2006 and is a privately held corporation with its headquarters in Boca Raton, Florida. RedMark is an Accela Certified Implementation Partner and premier provider of Professional Services, as well as a reseller of Accela software solutions. The company has partnered with Accela, the industry leader in government software, since its inception.

RedMark's implementation and expansion solutions integrate best practices of consulting, technology implementation, education and value management activities for the success achievement of our client's objectives. Customers are led through Business Process, Analysis and Design, Solution Development and Solution Deployment phases with the continuous driving objective of maximizing value from their investment.

In addition, having deployed Accela solution at several agencies throughout Florida, RedMark is intimately familiar with Florida Statutes as they relate to agencies and their Land Management processes. What follows is a partial list of Florida Accela implementation projects:

- Lee County
- Martin County
- Polk County
- Pinellas County
- Lake Worth Drainage District
- Reedy Creek Improvement District
- City of Weston
- Village of Key Biscayne
- Jackson County

- Brevard County
- City of Tampa

The professionals in our deployment teams average 5 years' experience specifically with the Accela Civic Platform product, and related implementation deliverables such as data conversion, report writing, scripting, integration, and more. As a Certified Accela Partner, RedMark's has successfully delivered all aspects of an Accela implementation project, including following Accela's implementation methodology.

1.4 Audited Financials

RedMark Technologies, LLC is a privately held corporate entity, organized and maintained pursuant to the laws of the State of Florida. As a non-public corporation and in accordance with its corporate policies, RedMark does not make broad public disclosures of its financial records or general fiscal condition.

As a private entity subject to the corporate governance as established by its directors, RedMark maintains its financial condition and related statements confidential. Due to the sensitivity of this information, and the fact that our company is not publicly traded, releasing such information to the public would open the company to undue scrutiny by its competitors.

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2 Technical Proposal

2.1 Applications Software

Accela Civic Platform is the nation's leading land management and permitting system. This system enables complete lifecycle activity management and fosters accountability, efficiency and transparency in government operations. When the Accela Land Management and Licensing modules are deployed with each of Accela's unique add-on modules, the Accela Civic Platform enterprise offers government clients an exceptional platform that promotes:

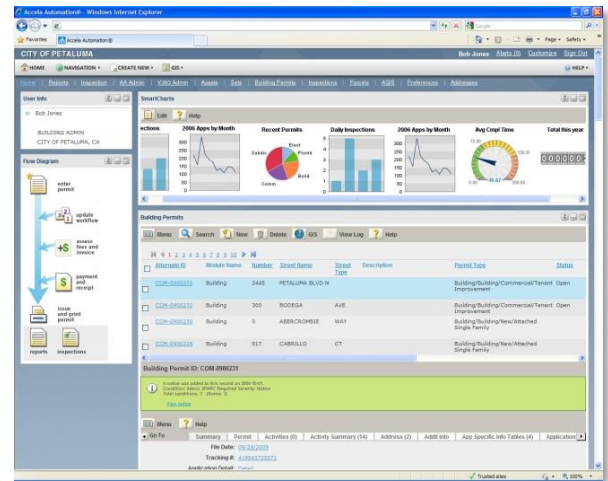
- ▶ **Flexibility and versatility** in land management and permitting with the *Accela Land Management* module. This comprehensive business intelligence solution automates government operations and facilitates timely and proactive activity management.
- ▶ **Streamlining and efficiency** in licensing with the *Accela Licensing* module. This solution automates the licensing and renewal process for the City's licensure needs.
- ▶ **Self-service**, using *Accela Citizen Access*, the public facing web portal. This add-on technology substantially reduces the need for counter operations and provides 24 hour online and telephone access to government operations.
- ▶ **Visualization of information** with *Accela GIS*, which delivers mapping and routing functionality to the enterprise. This add-on module overlays government data onto Bing and GIS maps, and allows customers to initiate and manage permit activities from a geospatial platform.
- ▶ **Mobility** via *Accela Mobile Office* and *Mobile Citizen Access*. These modules enhance system accessibility options for field staff and community users by extending back office and public self-service options to the field.

Accela Civic Platform is the most mature and the most sophisticated governmental workflow management product on the market today. For nearly ten years Accela Land Management product has advanced the role of government and improved their service to local communities.

2.1.1 Accela Land Management Module

Accela Land Management manages and guides all land and permit activities from initiation to closure. Core to the system design is its unique flexibility to adhere to the exact business processes of individual government agencies. Further, users are presented with the exact business information needed to perform their individual job functions.

The flexible configuration of Accela Land Management lets customers define and manage the sequence and requirements of the hundreds of steps involved in a workflow, including initial applications, plan reviews, code enforcement, fee calculation/collection, inspections, notices, and approvals. It manages all types of regulatory activities, such as one-time processes such as residential construction permitting and pesticide application permitting, or annually renewable activities such as elevator permits and air quality permitting.



Entirely web based, Accela Civic Platform's user interface employs a portlet-based design strategy. Several portlets are organized across a single page and are configured to meet the needs of individual user roles.

Among the most frequently used portlets are those presenting system alerts and notifications, upcoming and overdue tasks, performance-based charting, and frequently used data queries. When used with the Accela GIS add-on module, government activity data is viewable through a map portlet, confirming the system's versatility in how data is represented.

When used with the Accela Mobile Office add-on module, all land management activity data is available to field staff, enabling a full mobile field office solution. Inspector assignments, schedules, routes, status reports, and inspection results are all logically presented. Data collected in the field is recorded electronically and uploaded to the system for immediate availability throughout the enterprise.

Further extending Accela Land Management's offering to the public is the Accela Citizen Access, which promotes true government transparency and citizen self-service by bringing government services to the public 24 hours a day. In eliminating the need for in-person and paper processing, these system components unite governments and their constituents through accessible technology while reducing costs.

The overall flexibility of Accela Civic Platform is supported by business intelligence that maintains vigilance over these processes. Among the many system attributes are the following features:

- ▶ Audit trails document changes made to critical system areas
- ▶ Event Manager Script Engine (EMSE), the system's script engine, offers action/inaction based automation capabilities
- ▶ Required Conditions confirm that all requirements are met prior to an activity occurring
- ▶ Fees and Cashiering functionality employs many GAAP principles, offers full account reconciliation, and may be used with cashiering systems or used with cash drawers to complete the payment process for all fee-based activities
- ▶ Abundant use of Reference Data tables appropriately reuse system data, eliminate duplicate data entry, and reduce the chance of errors
- ▶ Robust administrator tools support ongoing management of data and processes, ensuring all activities adhere to the specific business rules in place

2.1.1.1 Accela Citizen Access Add-On Module

Accela Citizen Access extends government services to the public 24-hours a day, through a self-service web portal. Citizens, contractors, and other external parties can interact with government data online, eliminating the need for counter operations. This add-on module enables true transparent government operations where Accela Civic Platform customers determine what processes, information, and activities are exposed to the public.

Exhibit 1 and Exhibit 2 show how the City of Atlanta, GA and Salt Lake City, GA use Accela Citizen Access to serve their citizens.

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Exhibit 1: City of Atlanta, GA web portal using Accela Citizen Access

https://aca.accela.com/Atlanta_Ga/Default.aspx

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Welcome to the Salt Lake City Citizen Portal

What would you like to do today?

Select one of the areas below to locate an existing application by City Department:

Building Check/Research Permits Apply for a Permit Schedule an Inspection	Bus Lic Check/Research Licenses
Planning Check/Research Petitions	Engineering Check/Research Permits
Fire Check/Research Permits	Transportation Check/Research Permits
Utilities Check/Research Permits	Search Lookup Address

Permit Manager Help

Learn more about Permit Manager including:

- [Register an Account](#)
- [Contractor Inspection Scheduling](#)
- [Homeowner Inspection Scheduling](#)
- [Schedule Inspections using IVR](#)
- [Apply for a Permit](#)
- [My Permit Manager](#)

Exhibit 2: Salt Lake City, UT web portal using Accela Citizen Access

(<https://aca.slcgov.com/citizen/>)

Among the many citizen privileges available on using this add-on module, external users can:

- ▶ Apply for permits
- ▶ Submit complaints
- ▶ Schedule Inspections
- ▶ View inspection results
- ▶ Upload documents
- ▶ Review application processing status
- ▶ View system generated alerts and notifications
- ▶ View a history of all projects
- ▶ Establish/fund trust accounts
- ▶ Make payments online
- ▶ Conduct searches
- ▶ View project data on maps
- ▶ Search addresses/parcel information
- ▶ Access government reports



Accela Citizen Access can also be configured for handheld devices such as Blackberry, iPhone, or other portable web browsing devices, further enhancing accessibility options for public users.

Accela Citizen Access inherits the exact business rules established in the Accela Land Management module; therefore, no individual module configuration is required. System administrators simply select which land management activities are to be made available to the public. Additionally, all Accela modules comprised in the Accela Civic Platform enterprise share the same central database; therefore, data submitted through Accela Citizen Access is immediately available for processing in Accela Land Management.

Accela Citizen Access provides a complete solution for all external users to interact with government procedures and operations in a meaningful and trusted fashion. This e-government solution is deployed in more than 100 communities nationwide and has greatly contributed to the effectiveness and efficiency of Accela's customers operations.

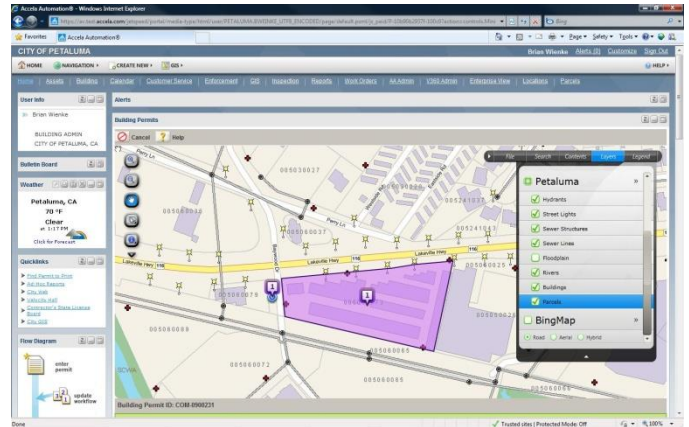
2.1.1.2 Accela GIS Add-On Module

Built using Microsoft Silverlight technology and leveraging Bing Maps and ArcGIS Server from ESRI, Accela GIS delivers a next generation map interface to Accela Civic Platform. This solution realizes a state of the art method of visualizing government data geographically in an elegant user interface. The Microsoft Silverlight technology enhances the user experience with:

- ▶ Optimal server response times
- ▶ Smooth panning
- ▶ Context sensitive commands and menu items
- ▶ Drag and drop functionality
- ▶ Client side graphic rendering

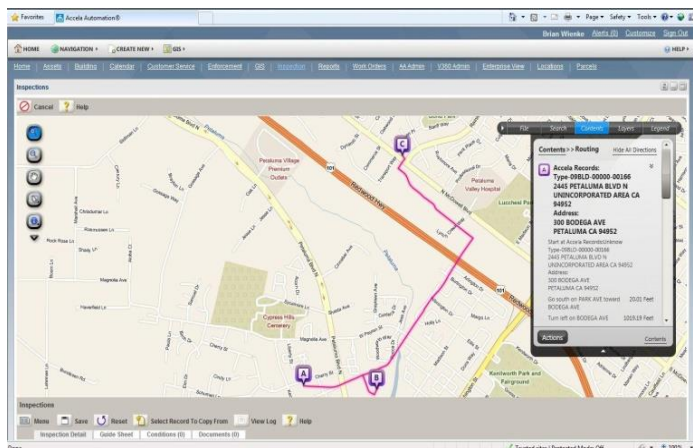
The Accela GIS add-on module greatly expands the versatility of Accela Land Management, giving users the option to initiate and manage all land management activities from a map interface.

Bing Maps are provided out of the box with the Accela GIS map viewer and customers may enhance user views by adding the agency's ArcGIS map layers to the map viewer. Together, these three data sources are united to offer the most comprehensive visual representation of government and location data available. When users query Accela Civic Platform data and view the results spatially, these views are greatly enhanced by maps.



Users manage, edit, and update data from the map viewer. When selecting one or more parcels, the map viewer presents reference data and context-based action items (create record, show record, create inspection, etc.)

Optional map editing tools empower end-users to draw new features using points, lines, or polygons to represent actual geographic elements or assets. Once these new features are created, they can be associated to transactions in the Accela database with the geometry committed to the GIS database.



Accela GIS supports efficient field work through its routing features. Inspection schedules can be automatically routed or users can choose to optimize inspection schedules based on shortest distance or travel time.

When deployed with Accela Mobile Office, routing capabilities are available whether connected or disconnected from the network. Routes and driving directions can be saved and printed as needed. The Accela GIS map control is common to Accela Civic Platform and Accela Mobile Office, reducing training needs across modules.

2.1.2 Industry Standard versus Proprietary Components of Accela Civic Platform

Only Accela Civic Platform's code is proprietary, and it is developed with industry standard tools and coding practices.

2.1.3 Ensuring System Integrity

2.1.3.1 Local Customizations

Accela Civic Platform based products have the advantage of user interface integration. The interfaces of these products are provided as a set of portlets—the user interface equivalent of a reusable business component. Portlets are small windows within a user screen with different types of information. In the same manner that common websites (such as yahoo.com or msn.com) allow users to customize their homepage views with news boxes, stock quotes, and weather reports, Accela Civic Platform allows users to choose their screens most pertinent to their business functions (such as upcoming inspections or frequently used reports).

Several portlets can be organized on a single page and several pages make up the Accela Civic Platform system. System administrators can customize portlets and pages, grouping information logically for end-users, based on their specific user roles.

In addition to the configurations established by the system administrator, end-users can further tailor their screens to suit some of their personal preferences. Users can view the different pages and portlets available to them, and customize these components, so that each time they log on to the system, their interface is personalized to the information they need.

All user functions are performed through the Accela Civic Platform user console, displayed through multiple types of portlets. This role-based user interface approach breaks down disparate “silos” of information to create a more efficient end-user thus reducing costs.

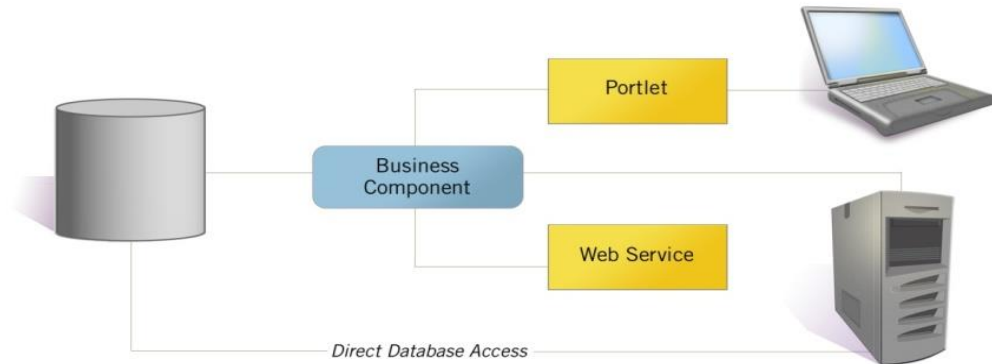
2.1.3.2 Development of Interfaces

Accela Civic Platform offers multiple integration options to its users. Business components are constructed using the Enterprise Java Beans (EJB) standard, which permits automatically generated documentation in an industry standard format.

The EJB foundation allows business components to be accessed both by Java based interface programs, and exposes these procedures to Web Services, a

programming language independent XML based interface that also provides reliable long distance data transport.

Exhibit 3: Multiple Integration Options



2.1.4 Level of Product Investment

Investing millions annually in research and development is proof of Accela's commitment to stay current with marketing leading technologies.

2.1.5 Standard Product Release Cycle

Accela is committed to the ongoing development of its products and works continuously to enhance the solutions to remain current with new technologies and consistent with best business practices. Their dedication to product development manifests itself in a strong financial investment in R&D, a clear indicator that Accela's products and technology will continue to meet and exceed the needs of its customers.

The following bullets outline Accela's typical release cycle:

- ▶ **Frequency** – Accela has a defined update schedule with minimally two major scheduled releases per year, and other point releases as needed.
- ▶ **Provision of release notes** – All version upgrades, patches, etc. are provided with corresponding instructions to enable a complete understanding of the reasons and outcomes. Detailed product release notes accompany all product releases, and are alternatively available on Accela's website for customers to review prior to installation. Upgrades and patches do not affect any local customizations developed by individual agencies.
- ▶ **Ability for City staff to implement versus need to contract for services** – Upgrades to Accela Civic Platform do not require a contract. When an upgrade becomes available, an e-mail notification is sent to all affected customers. The information is also posted on the Support/Product Updates section of Accela's corporate website. Clients

have the option of accepting these upgrades and releases into their configured systems. All system upgrades, and point and patch releases are provided via a secure FTP site, are easily installed and contain information regarding the specific release for review prior to their incorporation by Accela's client sites.

- ▶ **Duration of support for prior releases** – Pursuant to their Maintenance agreement, Accela will provide maintenance support for the current release of each of its maintained software applications and for the release immediately preceding such current release. All other releases are deemed to be “Legacy Releases”. Accela will respond to maintenance requests concerning Legacy Releases only using currently-available information. Services requiring additional research, engineering-level support, or coding or programming by Accela will not be provided pursuant to Accela's MA, but may be separately available at rates and on terms that may vary from those described herein.

2.1.6 Integrated Modules

The Accela Civic Platform system was originally envisioned and has been continually developed in its 10-year history to perform as a single system of seamlessly connected modules and add-on products to satisfy the automation needs of a multi-departmental enterprise. To date, this approach and strategy has been fulfilled and all of Accela's products are inherently integrated to perform together in whatever combination of products/add-ons are needed by Accela's governmental clients. While modules may be purchased separately and developed to interface with other existing third party systems, the addition of any module or add-on product will be as integrated as if it had been purchased first. The full extent of Accela's approach and strategy is best seen at our client sites where multiple departments are each satisfying their individual needs with specific modules, while the entire city or county is unified under a single system with a single database.

2.1.7 Integrated Third Party Products

Any integration(s) to third party software either currently deployed in the City's architecture or to any third party software to be implemented in conjunction with and during the deployment of the Accela Civic Platform solution that is part of this proposal and is covered in detail in the Statement of Work.

2.1.8 Upcoming Releases

As Accela is a private company, all planned functionality in future releases is proprietary and confidential.

2.1.9 Data Conversion Tools

RedMark uses tools for all of its data conversion activities at other client sites. The Accela Data Mapping tool and Accela Conversion tool may be utilized for conducting the needed conversion at the City of Gainesville.

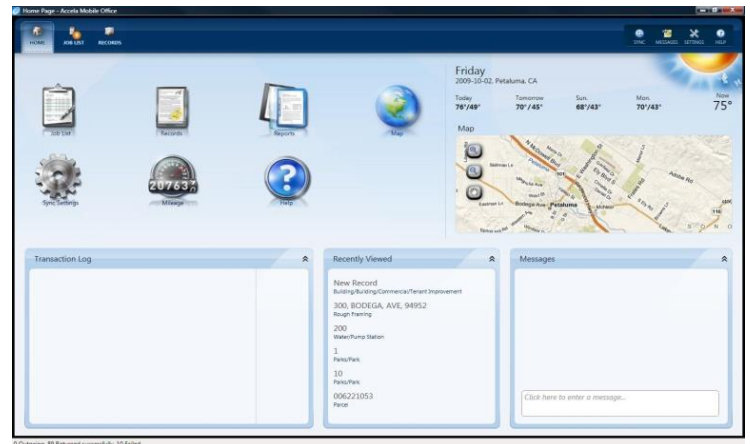
2.1.10 Field and Remote Access Mobility

Accela Mobile Office enables workers to take their work directly to the field by supporting on-site, real time land management activities. Built using Microsoft Windows Presentation Foundation (WPF) framework, this add-on module is a smart client application that offers:

- ▶ Role based configuration
- ▶ Elegant user interface
- ▶ Map-centric approach
- ▶ Store and forward capabilities for on or offline work
- ▶ Routing with driving directions
- ▶ Reporting from the field
- ▶ Broadcast messaging and e-mail communications

Accela Mobile Office's intuitive design and logically organized user interface promotes ease of use among all field staff. Its usability is enhanced by its role-based configuration which presents users with the exact business information needed to perform their individual field functions.

Field personnel conducting inspections have complete access to all transaction data, including record histories. Electronic documents, including sketches and digital photos, may be attached to inspection records as part of the inspection process. Once inspection findings documented in Accela Mobile Office are submitted to system, they are immediately available across the enterprise. Based on the workflow configuration, inspection results can automatically trigger system alerts, send email notifications, and generate reports, letters and other notices.



When used with Accela GIS, field operations are further enhanced and a fully Mobile GIS solution is enabled. Mobile users have access to Bing Maps and ArcGIS Server maps and data. Further, they are empowered to view complete parcel and activity histories, initiate new activities from the map interface, and optimize inspection routes all from their mobile devices.

Accela Mobile Office runs on a wide variety of platforms including Windows XP, Windows Vista and Windows 7, and is optimized for touch screen devices, making it compatible with many mobile devices including Tablet PCs and laptops.

Accela Mobile Office has online and offline functionality and can operate independently of internet connection. It can operate in wireless environments, transmitting field information and data in real-time. Alternatively, it can operate offline and in a store and forward mode where data captured is uploaded to the system upon reconnection to a wireless network or upon return to the office.

2.1.11 Interface and Integration Approach

Accela Civic Platform based products have the advantage of user interface integration. The interfaces of these products are provided as a set of portlets—the user interface equivalent of a reusable business component. Portlets are small windows within a user screen with different types of information. In the same manner that common websites (such as yahoo.com or msn.com) allow users to customize their homepage views with news boxes, stock quotes, and weather reports, Accela Civic Platform allows users to choose their screens most pertinent to their business functions (such as upcoming inspections or frequently used reports).

Several portlets can be organized on a single page and several pages make up the Accela Civic Platform system. System administrators can customize portlets and pages, grouping information logically for end-users, based on their specific user roles.

In addition to the configurations established by the system administrator, end-users can further tailor their screens to suit some of their personal preferences. Users can view the different pages and portlets available to them, and customize these components, so that each time they log on to the system, their interface is personalized to the information they need.

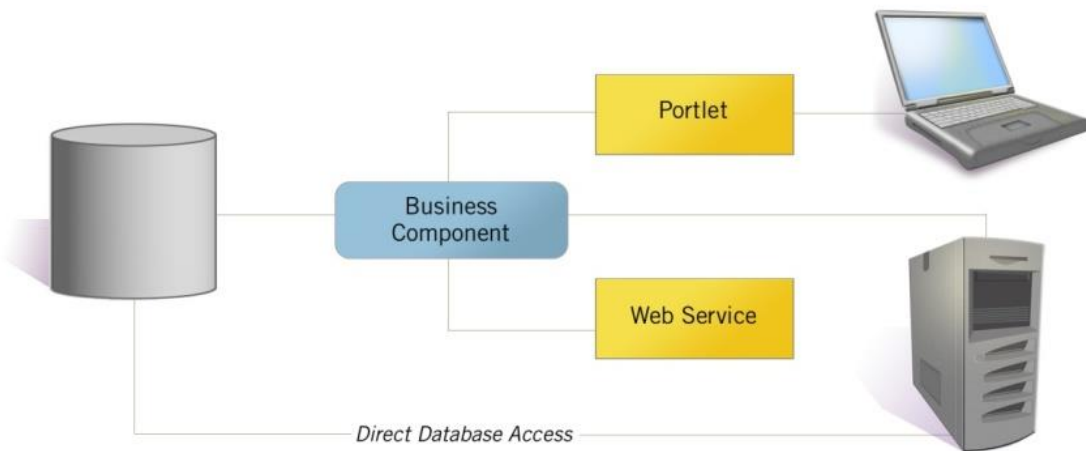
All user functions are performed through the Accela Civic Platform user console, displayed through multiple types of portlets. This role-based user interface approach breaks down disparate “silos” of information to create a more efficient end-user thus reducing costs.

Accela Civic Platform also offers multiple integration options to its users. Business components are constructed using the Enterprise Java Beans (EJB)

standard, which permits automatically generated documentation in an industry standard format.

The EJB foundation allows business components to be accessed both by Java based interface programs, and exposes these procedures to Web Services, a programming language independent XML based interface that also provides reliable long distance data transport.

Exhibit 4: Multiple Integration Options



2.1.12 Supported Data Exchange Standards

Currently, we do not provide any native support for data exchange formats, however we could support some formats and transactions with scripting efforts.

2.1.13 Reporting Approach

- a) Business Intelligence can exist on a variety of levels under the Accela Civic Platform system. The system has its own unique and system-wide facilities and features that assist users in locating and reviewing information that exists on a per module basis or across the entire enterprise. Features such as SmartCharts and QuickQueries can exist on the end user's personal dashboard and bring forward key business information on a real-time basis without the need for re-querying the database. These features allow for a wide variety of presentation formats such as graphs, pie charts, odometers, etc. Additionally, the system provides all users the ability to query specific information through an easy-to-use search screen that provides many ways of selecting and

sorting the desired queried information. Lastly, Accela trains users as part of its implementation activities on one of three of the most common third party reporting systems (Oracle Reports, Crystal Reports and MS Reporting Services) so that more complex reports can be generated and once generated, saved for use in the future by the original user or by other authorized users.

- b) Custom reports are created as part of every Accela Civic Platform implementation, as these documents not only comprise what are normal “reports”, but also include other system outputs such as citations, permits, licenses, letters, etc. The RedMark team will work with the City’s project team in identifying the needed reports that will be developed using third party reporting systems and also jointly determine if these reports should be developed by RedMark, the City or both. Since we offer training into these report writers as part of our implementation activities, many of our clients choose to use their own staff to develop these reports.
- c) The City of Gainesville can establish a repository into which only those reports it has “certified” will be deposited and reused, as necessary. Through security privileges, such reports may not be changed except by end users having the appropriate roles and privileges so that the repository only contains those reports that have been certified.

2.1.14 Inherent versus Integrated Technologies

We have described below the inherent and integration capabilities of the Accela Civic Platform system:

- ▶ **Imaging/Content Management** – integration to third party systems
- ▶ **GIS** – inherent in proposed solution via Accela GIS
- ▶ **Workflow tools** – inherent in proposed solution
- ▶ **E-mail solutions** – leverage third party systems
- ▶ **Point of sale terminals** – leverage GovXML to create an interface to almost any POS system.
- ▶ **Data warehousing** – integration to third party systems

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3 Implementation Plan

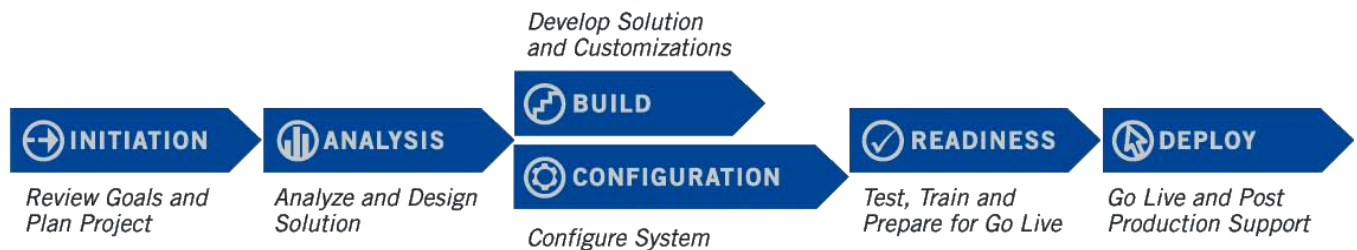
The RedMark team offers unmatched experience in software implementation activities – throughout our history we have installed, configured, converted data into, and trained people in Accela’s software products in more than 30 engagements.

System implementation is a critical activity that sets the tone for the City’s ongoing use of the Accela Civic Platform system. The Accela Implementation Methodology (AIM) will be employed to support a thorough and well-managed process. A RedMark implementation team will lead all project management, working in partnership with City staff to confirm that this project is delivered on time and within budget.

3.1 General Implementation Approach

As shown in Exhibit 5, Accela’s implementation methodology is comprised of six stages, each with its own project objectives, activities and defined deliverables.

Exhibit 5: The Six Stages of Accela’s Implementation Methodology



The section below describes each AIM stage, which is defined by specific Objectives, Activities, and Deliverables, which are defined in Exhibit 6.

Exhibit 6: AIM Component Definitions

AIM Component	Definition	Expectations
Objectives	The defined purpose and expected achievements of the stage.	At the completion of each stage, the City/RedMark project management team confirms that these objectives have been achieved.

Activities	The tasks to be performed in order to achieve the defined objectives.	Activities are the daily tasks of the project implementation and follow the format defined of the project plan. Activities are closely monitored and drive the overall project status/ progress.
Deliverables	The tangible result that will be delivered at the end the stage. A project deliverable can be anything from a completed document, a presentation, or configured system.	Deliverables are material artifacts that represent the defined objectives and are the result of Activities. A deliverable represents the objectives of the stage in a substantive manner whereby the project success can be evaluated and approved.

3.1.1 Stage 1 – Project Initiation

The initiation phase is a critical stage that sets the tone for the entire implementation. All project expectations and guidelines are defined in this stage.

During the project initiation stage, the statement of work is finalized and the contract is completed and executed. A thorough review of the project scope is performed and all Objectives, Activities and Deliverables are defined. Representatives from RedMark and the City will be identified as project team members who will develop project plans, project milestones, and communications plans.

3.1.1.1 Objectives

- ▶ Establish a detailed project approach that will meet City-specific business needs. A project team is developed and each member’s role and responsibility is clearly defined. This team will develop the detailed project plan, resource/task assignment list, and project timeline.
- ▶ Develop a strong communication plan that includes status meetings, progress tracking and reporting mechanisms, issue/risk management plans, budget management, and resource management plans.
- ▶ Review and approve all project deliverables.
- ▶ Identify of all project milestones, including include approval and sign-off requirements.

3.1.1.2 Activities

- ▶ Meet with all project stakeholders to discuss the project approach and communicate expectations. This includes identifying team leads and reviewing project communication plans.
- ▶ Review project scope and create a project plan that identifies all required resources.
- ▶ Establish a project communication schedule that outlines project status meetings and project progress/reporting procedures.

- ▶ Identify potential areas of risk and create a risk management plan.
- ▶ Establish a formal review and approval procedure for all deliverables, milestones, and project completion activities.

3.1.1.3 Deliverables

- ▶ **Project Charter** – A comprehensive deliverable that defines how the project will be managed and executed for each stage of the implementation. This document details all functional areas of the project and includes the project approach, project organization and roles/responsibilities matrix, project plan, communication plan, and the issue/risk management plan. The charter outlines how deliverables, milestones, and change control procedures are addressed throughout the lifecycle of the project.
- ▶ **Statement of Work** – The scoping document that defines all consulting/professional services work and deliverables to be provided by RedMark.
- ▶ **Baseline Project Plan** – A project timeline that details the dates and durations of all implementation activities, including status meetings and executive committee meetings. This plan serves as the main calendar to track all events related to this project.
- ▶ **Project Status Report Template** – The template from which all project status reports are created.
- ▶ **Project Initiation Meeting and Product Demonstration (Kickoff)** – During the project kick-off meeting, the project charter and the schedule of status meetings and deliverables will be reviewed with all participating departments and the executive committee overseeing this project.

3.1.2 Stage 2 – Analysis

During the Analysis phase, the business processes currently in place are defined, the vision of future business processes are identified, and where/how these two sets of processes vary.

A series of Requirements Workshops are held with all participating department. System requirements are discussed and then analyzed for configuration within Accela Civic Platform.

3.1.2.1 Objectives

- ▶ Identify the detailed system requirements for each record/transaction/activity type and for all in-scope interfaces.
- ▶ Prepare detailed requirements for in-scope data conversion activities.

- ▶ Define reporting needs and report development resources. A list of recommended reports (including custom documents/letters/reports) is defined.
- ▶ Create system test plans that verify the system configuration and confirm required functionality.

3.1.2.2 Activities

- ▶ Collect and chart each business process as a basis for configuration in Accela Civic Platform.
- ▶ Collect employee names and roles for establishing user groups.
- ▶ Document existing record numbering schemes and determine their appropriateness for the new system.
- ▶ Collect and document intake requirements, forms, and data fields for each record type.
- ▶ Collect and document output requirements (documents/letters/reports).
- ▶ Collect and document fees, fee schedules, and collection procedures for each record/activity type.
- ▶ Collect and document all required inspections and inspection result options for each case record/activity type.
- ▶ Provide orientation and training on Accela Civic Platform's database structure.
- ▶ Provide assistance in identifying potential data elements that should be mapped into the Accela Civic Platform application.
- ▶ Work with the City to identify required fields to be mapped to existing agency systems that are identified required interfaces.
- ▶ Conduct workshops with management team(s) to discuss potential organizational impacts associated with enhanced workflows and job functions.
- ▶ Develop training requirements for user groups within each department.
- ▶ Prepare and review a High-Level System Testing Plan for each department.

3.1.2.3 Deliverables

- ▶ **Software Configuration Document** – The blueprint for configuring the Accela Civic Platform system. This document outlines all business rules and required workflows and details the data conversion, reporting, and infrastructure requirements.

3.1.3 Stage 3 – Configuration

The configuration stage marks the configuration of all records and workflows in Accela Civic Platform. Once completed, all application, reports, interfaces and data loading routines are system tested.

3.1.3.1 Objectives

- ▶ Complete the configuration and testing of the Accela Civic Platform, meeting all in-scope requirements.
- ▶ Develop and system test the data conversion programs to migrate data from the in-scope data sources into the Accela Civic Platform application.
- ▶ Prepare Accela Civic Platform for transition to the production environment.

3.1.3.2 Activities

- ▶ Identify and configure all record types and workflows.
- ▶ Configure and system-test the application.
- ▶ Conduct review sessions with the departments throughout the configuration process to ensure the expectations are met.

3.1.3.3 Deliverables

- ▶ **Configuration of in-scope record types** (workflows, task statuses, user defined fields, fee structures, business rules, etc.) – The system will be fully configured to meet City specific business rules and processes.

3.1.4 Stage 4 – Build

(Note: Stage 4 occurs concurrently with Stage 3)

The build stage includes development of system integration links, event scripts, in-scope reports, and data conversion/migration programs. Although stages 3 and 4 occur simultaneously, configuration activities do not end until after the Build stage is completed.

3.1.4.1 Objectives

- ▶ Successful installation of Accela Civic Platform in the support environment.
- ▶ Complete accurate data conversion mappings. Confirm schedules are in-line with required data loads for system and user acceptance testing cycles.
- ▶ Evaluate City technology infrastructure for compliance with Accela Civic Platform's technical standards, specifications, and requirements.

- ▶ Map, review, and convert/migrate all system data into Accela Civic Platform
- ▶ Develop and test all in-scope interfaces, event scripts, and reporting.

3.1.4.2 Activities

- ▶ Assess City support environment to ensure that the infrastructure components meet all requirements.
- ▶ Make recommendations (if necessary) for upgrades to the support environment, if needed.
- ▶ Install all purchased Accela Civic Platform modules on the support environment.
- ▶ Review required data conversion activities to ensure proper data field mapping.
- ▶ Develop and system-test the data conversion/migration programs and load the data into Accela Civic Platform.
- ▶ Configure/develop and system-test the in-scope reports.
- ▶ Develop and system-test the application interfaces. The RedMark team will work with City IT staff to ensure the proper enhancements to the legacy systems are made for system integration.
- ▶ Test all installed Accela Civic Platform modules

3.1.4.3 Deliverables

- ▶ **Event Script Development** – Development of all in-scope event scripts.
- ▶ **Report Specifications and Development** – Development of all in-scope reports.
- ▶ **Data Conversion Specifications and Development** – Conversion/Migration of all legacy data.
- ▶ **Interface Specifications and Development** – Development of all in-scope interfaces.

3.1.5 Stage 5 – Readiness

During Stage 5, Readiness, the Accela Civic Platform system is tested, users are trained, and RedMark's team prepares for system deployment. User acceptance testing plans are developed, approved, and executed during this stage. When this Stage is complete, the City must confirm all system requirements have been successfully been met.

3.1.5.1 Objectives

- ▶ Develop and execute a User Acceptance Test Plan. Gain approval/confirmation that the terms and conditions of the system have been met.

- ▶ Complete all User Acceptance Test activities; documented deployment plan must be executed by the City prior to Stage 6: Deployment.

3.1.5.2 Activities

- ▶ Execute the User Acceptance Test Plan to ensure the requirements have been met.
- ▶ Schedule, conduct, and document results of testing sessions with each participating department to execute the User Acceptance Test Plan. If necessary, corrections deemed to be in-scope will be made to the system.
- ▶ Schedule an executive session to review the successful completion of the User Acceptance Test Plan for approval and sign-off.
- ▶ Gain approval to execute the Deployment Plan.
- ▶ Schedule training sessions.
- ▶ Conduct training (includes end user training, administrative, and maintenance training) on their enhanced workflows using the new Accela application (business operations training).

3.1.5.3 Deliverables

- ▶ **User Acceptance Testing** – A User Acceptance plan will be developed and is used as a guideline in User Acceptance Testing. Approval of completion of this deliverable confirms that RedMark has successfully met the requirements of the new system and the system is ready to be deployed.
- ▶ **End User Training** – User groups are trained in the use of Accela Civic Platform. This training includes how their daily responsibilities and workflows are enhanced by the Accela application (business operations training).

3.1.6 Stage 6 – Deploy

The final stage of the project – Deploy – is marked by the transition of Accela Civic Platform to the production environment. All necessary go-live activities are identified, executed, documented and reviewed. A review of the Statement Of Work ensures that all system requirements have been met.

Once deployed, the agency may begin to use the system in their day-to-day activities. Upon completion of Stage 6, all support functions are transition to Accela’s Customer Resource Center.

3.1.6.1 Objectives

- ▶ Completion of all training on the use and maintenance of Accela Civic Platform.

- ▶ Successful deployment of Accela Application in the production environment.
- ▶ The City begins to use Accela Civic Platform in their daily activities.
- ▶ Obtain Project Completion Signature, indicating that the project has completed successfully.

3.1.6.2 Activities

- ▶ Complete all training for all specified user groups.
- ▶ Execute the Deployment Plan, whereby the system is installed and live in a production environment.
- ▶ Schedule an executive session to review the activities and results of deployment, and gain signature indicating that the project has been successfully completed.

3.1.6.3 Deliverables

- ▶ **Go-Live Checklist Development, Tracking and Execution** – A document detailing all go-live required activities, timelines, and execution.
- ▶ **Go-Live** – Accela Civic Platform is fully transitioned to the production environment and ready for daily use.
- ▶ **Post Go-Live Analysis** – A review of all activities detailed in the Go Live Checklist and confirmation of project completion.
- ▶ **Formal Transition to the CRC for Ongoing Support** – The process whereby the City project is transitioned to the CRC for ongoing support. This includes training City staff on the many ways to contact and interact with the CRC, as well as the transition of all documented issues and requests from the implementation team to CRC staff.

3.1.7 Transition from Sales Cycle to Implementation Phase

Accela and RedMark have worked together through all stages of the sales cycle; as a result, the implementation team is already aware of the current proposal. At project kickoff, the RedMark implementation team will take over the project and get buy-in from the City project team on implementation approach and assignments.

3.1.8 Key Factors for Success

Project implementation will be a collaborative effort between the City and RedMark. Significant time will be spent to ensure City goals are met, as defined in the Statement of Work. Within this process, we define three key factors that will impact our success:

1. **Knowledge Transfer** – It is critical that City personnel participate in the analysis, configuration and deployment of Accela Civic Platform. RedMark will transfer knowledge to City staff, promoting self-sufficiency in the management of Accela Civic Platform.
2. **Dedicated City Participation** – City staff must be actively involved throughout the duration of the implementation. RedMark will work closely with the City to create the Project Plan that defines reasonable and appropriate expectations of these personnel.
3. **Deliverable Acceptance Process** – It is critical that the City reviews and approves each project deliverable to confirm that RedMark is meeting its expectations. Upon completion of each Deliverables Acceptance Form, will RedMark proceed towards the next milestone.

Other important factors include:

- ▶ A Project Sponsor who stays involved with the project
- ▶ Strong project management from the City and RedMark side
- ▶ Understanding the project scope
- ▶ Listening to key personnel during the business requirements stage of the project
- ▶ Working collaboratively with City core team to make sure they understand all aspects of the configuration
- ▶ Making sure end users receive adequate training
- ▶ Commitment from end users to perform thorough end to end testing
- ▶ Creating a go-live plan that provides adequate pre and post go live support
- ▶ Long term commitment for support from software vendor

3.1.9 Key Differentiators

The Accela implementation methodology can work for small, medium or large-scale projects. By working closely with the City core team through each stage of the project, the entire team will be in touch with the progress of the project. If the project starts to fall behind or issues arise, a strategy will be developed quickly to get things back on track.

By working together throughout the implementation, the City will also be able to better support the system after go live.

3.1.10 Phased Implementation Methodology

For this type of implementation, it is best to bring all groups on-line at the same time whenever possible. If a phased implementation is desired, components like Accela Citizen Access and Accela Mobile office can be phased in at later dates.

3.1.11 Transition from Current System to Accela Civic Platform

The entire length of the implementation will start preparing the end users for the transition to Accela Civic Platform. As the project moves along through each stage, the core team and end users will learn more about what to expect.

The go-live event will typically start by shutting down the current system on a Friday afternoon with a weekend conversion. The new Accela Civic Platform system would then go-live on a Monday.

3.1.12 Accessing Data from Old System

Whenever possible, we recommend moving all historic permit information to the new system. There are two types of data—active records and historic records. Active records will get the most attention since they will be used immediately after go-live and they will likely need to be set to their current state in the new workflow process. Historic records will be moved as-is for informational purposes and to provide one common location for historic data.

RedMark will ask the City to play a key role in exporting all data out of their current legacy systems into common formats.

3.1.13 Running Parallel Systems

It is not common for an Accela Civic Platform implementation to have a “parallel” system period since many of the features in Accela (e.g., workflow) probably do not exist in the City’s current system. The UAT (User Acceptance Testing) stage of the project however should use real life test cases to verify that the system is working as expected. For example, fees for a number of permits should be entered into the system to make sure the total calculation comes out correctly.

3.2 Project Management Approach

RedMark will perform ongoing project management services throughout the contract to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. Generally, these services include the following:

- ▶ Project plan management using Microsoft Project
- ▶ Project document management using a mutually agreed upon SharePoint site
- ▶ Risk management using mutually agreed upon SharePoint site
- ▶ Issue and risk management using mutually agreed upon SharePoint site
- ▶ Status reporting
- ▶ Enhancement and out-of-scope tracking and management
- ▶ Change order management
- ▶ Project workspace management
- ▶ Resource management
- ▶ Executive project oversight and quality assurance

By mutual agreement, some project management tasks may be shared between the RedMark Project Manager and the City Project Manager.

A SharePoint site may be hosted by RedMark to act as a central point for saving and sharing all project documents. At the City of Gainesville's discretion, a City SharePoint site may be used.

Documentation for the project plan, project charter, project status reports, issue log, configuration document, data conversion document and test plans will be maintained throughout the life of the project.

3.3 Change Management

The Configuration stage of the project will look at current business processes and the best approach to accomplish current procedures in Accela Civic Platform.

As part of the standard Accela implementation methodology, workflow diagrams and a configuration document will be created. These documents will be the basis for the configuration and will be reviewed and agreed to before actual system configuration starts.

Once the configuration is in place, standard operating procedure documents can be created by the City as How-To quick information guides for day-to-day tasks.

3.4 Report Development

RedMark will provide custom report development assistance for documents/letters/reports that are identified by the City as required for the new system in this task. This development will be done using Crystal Reports or SQL Reporting services. These custom reports will be deployed in Accela Civic Platform's Report Manager.

RedMark will also provide data base schema training and best practices for writing reports to the City report development team.

3.5 Data Conversion Plan

3.5.1 General Approach

The conversion of historic data from the existing database is one of the most significant aspects of a project when migrating from one system to another. The required data mapping effort will be conducted by City personnel with assistance from RedMark. Once the data mapping has been defined, the RedMark team will ask that a City representative sign off on the data maps. RedMark will load the data based upon the data maps specification provided by the City using the standard Accela import tools.

3.5.2 Recommended Approach

Our typical approach is to retain all historical data wherever possible. There should be no reason to load all historical permit information into Accela Civic Platform.

3.5.3 Potential Issues with Data Conversion

We do not foresee any issues in migrating data into Accela Civic Platform.

3.6 Integrations and Interfaces

The Build stage includes development of an Electronic Document Management System (EDMS) interface. RedMark will develop an interface to the EDMS system soon to be defined by City of Gainesville. The City is currently in the process of purchasing a new EDMS for the storage and retrieval of documents. The interface will be a standard storage and retrieval interface from Accela Civic Platform to the chosen EDMS.

Additionally, RedMark will develop an interface between Accela Civic Platform and the Agency's IVR system to receive updates in order to query permit status, retrieve inspections and inspection results, schedule inspections, and cancel inspections.

City responsibilities include:

- ▶ Allocating the time for qualified business and technical experts for the interface requirements sessions that are critical to the project success.
- ▶ Assisting in the interface/data mapping process.
- ▶ Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- ▶ Ensuring that the data populates successfully according to the interface requirements document.

3.7 Training

RedMark will provide 18 days (146 hours) of on-site and/or remote WebEx training sessions for the following areas:

- ▶ Accela Civic Platform Core Team Administration Training (24)
- ▶ End User Training (96)
- ▶ Report Schema Training (4)
- ▶ Accela Report Writer Training (4)
- ▶ Self-Hosted Training (4)

In addition, the following training will take place for the add-on modules under their own deliverables.

- ▶ Accela GIS (8)
- ▶ Accela Citizen Access (8)
- ▶ Accela Mobile Office (8)

RedMark will train all City users to be identified by the City Project Manager in each of the above areas. These training classes will be scheduled throughout the implementation process as appropriate.

RedMark and City responsibilities include:

- ▶ Properly select and prepare the users who will be participating in the training.

- ▶ Arrange the time and qualified people for the training who are critical to the project success.

3.7.1 User Documentation

Accela provides each client with the documentation necessary for the Accela Civic Platform modules and add-ons, which the agency has acquired and is implementing. This documentation is provided at no additional charge since it is inherently part of the implementation tools and documents that are necessary to give users and system administrators' knowledge about the facets and operation of the system.

RedMark will provide the City with the one soft copy in portable document file (.pdf) format, of all documentation necessary for the Accela Civic Platform modules and add-ons acquired. The City will have the right of reproduction so that as many copies can be made of the documentation as necessary for training or subsequent purposes.

Additionally, RedMark will provide the City with user training manual document templates in Microsoft Word format that can be customized with screenshots specific to the City's system.

System documentation includes the following manuals:

- ▶ Accela Civic Platform User Guide
- ▶ Accela Civic Platform Administrator Guide
- ▶ Accela Civic Platform Land Management User Guide
- ▶ User Guides for Accela Civic Platform add-ons (ACA, AMO and AGIS)
- ▶ Administrator Guides for Accela Civic Platform add-ons (ACA, AMO and AGIS)
- ▶ User Training Manual Document Templates
 - Accela Civic Platform User Training Manual
 - Accela Civic Platform User Training Manual (Instructor Version)
 - Accela Civic Platform User Accounting Manual
 - Accela Civic Platform User Conditions Manual

3.7.1.1 Data Dictionary and ERD

Every client deploying the Accela Civic Platform system is provided with a Data Dictionary and Entity Relationship Diagram. As confidential and proprietary documents, execution of a Non-Disclosure Agreement among both parties is required prior to the City's receipt of these products.

The data dictionary provides a map between the fields in Accela Civic Platform and the database table names, while the entity relationship defines the relationships established between these data tables and fields. During system implementation, RedMark will provide train client side report writing staff on the Database Schema, and how these materials augment report writing activities.

3.7.1.2 System Administrator Documentation

System Administrators and other IT professionals are provided comprehensive standard administrator manuals for each module purchased. Additionally support documentation, notes and other reference materials are provided, including:

- ▶ Accela Civic Platform Administrator Guide
- ▶ Accela GIS Administrator Guide .
- ▶ Accela GIS Data Dictionary
- ▶ Accela Mobile Office Administrator Guide
- ▶ Accela Citizen Access Administrator Guide
- ▶ Accela Mobile Citizen Access Quick Reference Sheet
- ▶ Creating an External Web Service Stub
- ▶ Accela Civic Platform Installation Guide
- ▶ Report Manager Administrator Guide
- ▶ Technical bulletins (as needed)
- ▶ Support Documents for Writing Scripts
 - Accela Civic Platform Script Writer’s Object Model Reference
 - EMSE Master Script Help System
 - Function List – Master Scripts

3.7.2 Tools to Develop Training Material

Accela has a complete set of training materials created in Microsoft Word that explain all functions in the Accela Civic Platform system.

3.7.3 On-going Training Opportunities

Post implementation training can be provided at any time, pursuant to the training rates specified in RedMark’s pricing notes.

Comprehensive product training is provided via WebEx or at Accela's headquarters in San Ramon, California. Custom on-site classroom style training designed specifically for the City may also be provided.

Accela also hosts regional educational seminars throughout the year and during its annual User Conference. Company newsletters and the Accela website keeps clients up to date on new training offered, product information, and company news. Accela also offers free webinars to current and prospective clients who wish to learn more about Accela products and their value.

3.7.4 Online Training and Classroom Training

Computer Based Training

Your training package can also include Computer Based Training (CBT) modules. CBTs are self-paced movies that demonstrate how to use the software, and reinforce learning with practice sessions and review questions. These CBTs can be generic, or RedMark can create custom CBTs that match the City's configuration.

CBTs provide self-paced learning to all users. They are especially helpful to users who were not a part of the initial classroom training, as well as to users who need more knowledge or a refresher. The trainers can also use the CBT courses as hard copy guides to supplement the classroom training.

Classroom Training

RedMark provides a variety of user and administrator training courses that are designed to orient, educate, and reinforce the core concepts behind the operation and management of Accela Civic Platform.

During project initiation, a draft training plan will be created based on the products purchased, the numbers and types of users, and the specific City requirements relative to training and development. Should needs change as the implementation progresses, this plan will be updated accordingly.

On-site training courses are provided in a traditional classroom setting and are led by an RedMark training professional. These courses can be generic or tailored to match the City's configuration. Class lengths vary between four hours and multiple days, and limit the number of attendees between 7 and 12 participants at a time.

Train-the-Trainer Classes

RedMark can also provide "train the trainer" classes, should the City prefer. This approach allows customers to use existing personnel to conduct user training classes during and after the project implementation.

If this training format is selected, RedMark can train these power-users in all aspects of the application from the perspective of a common user, a

technical/administrative user, and a trainer. This approach is often used by large agencies that have the staff and resources to conduct training sessions at its convenience.

It is our view that all required training can be easily accommodated and is practical to be performed on-site.

3.8 Testing

RedMark will work closely with the City implementation team to make sure the proper user acceptance testing and preparation for go live occurs. RedMark will be both on site and work remotely through this process.

3.9 Operational Process Redesign

The Configuration Analysis stage of the project will look at current business processes and translate them to best practices when using Accela Civic Platform. For example, workflows will be designed and shared among multiple permit types. Event scripts will also be developed to automate business processes whenever possible. This is a standard Accela implementation approach and can be discussed with any of our references.

3.10 System Documentation

Accela provides each client with the documentation necessary for the Accela Civic Platform modules and add-ons, which the agency has acquired and is implementing. This documentation is provided at no additional charge since it is inherently part of the implementation tools and documents that are necessary to give users and system administrators' knowledge about the facets and operation of the system.

Accela will provide the City with the one soft copy in portable document file (.pdf) format, of all documentation necessary for the Accela Civic Platform modules and add-ons acquired under the proposed contract. The City will have the right of reproduction so that as many copies can be made of the documentation as necessary for training or subsequent purposes.

Additionally, Accela will provide the City with user training manual document templates in Microsoft Word format that can be customized with screenshots specific to the City's system.

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The data dictionary provides a map between the fields in Accela Civic Platform and the database table names, while the entity relationship defines the relationships established between these data tables and fields. During system implementation, Accela will provide train client side report writing staff on the Database Schema, and how these materials augment report writing activities.

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System Administrators and other IT professionals are provided comprehensive standard administrator manuals for each module purchased. Additionally support documentation, notes and other reference materials are provided, including:

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- ▶ Accela GIS Administrator Guide and Data Dictionary
- ▶ Accela Mobile Office Administrator Guide.
- ▶ Accela Citizen Access Administrator Guide
- ▶ Accela Mobile Citizen Access Quick Reference Sheet
- ▶ Creating an External Web Service Stub
- ▶ Report Manager Administrator Guide
- ▶ Technical bulletins (as needed)
- ▶ Support Documents for Writing Scripts
 - Accela Civic Platform Script Writer's Object Model Reference
 - EMSE Master Script Help System

- Function List – Master Scripts

3.11 Knowledge Transfer

To ensure that the City's system administrators and designated power-users are appropriately equipped to operate, administer, maintain, and support the system, the Accela Implementation Methodology focuses on knowledge transfer throughout all phases of the implementation. This hands-on training confirms these users have the practical knowledge needed to manage the Accela Civic Platform system.

While RedMark cannot guarantee any particular expertise for City staff, RedMark will make all reasonable efforts to provide knowledge transfer for Agency as their personnel participate in the development, configuration and deployment of the system. It is necessary that the City acknowledge that their staff needs to be actively involved throughout the entire duration of services for this to be successful.

3.12 Project Recommendations

- ▶ Consider bringing RedMark back, three to six months after going into production, for two weeks of additional Professional Services to audit, tweak, and refine the system. In our experience, system users (whose training is specific to the requirements of this project), will quickly identify additional benefits once in production, that can be achieved via use of Accela Civic Platform that were not requirements within the original scope of this project. *Note:* An optional post Go-Live Support deliverable has been priced for this project. If the Agency decides to purchase the optional deliverable, the above mentioned services would be part of the post go-live support.
- ▶ Prior to contract signing, RedMark requests to work together with the City to refine the Scope of Work (Statement of Work) and Project Plan.
- ▶ While Accela has provided Fact Sheets in this proposal to inform City IT Staff of the self-hosted hardware requirements for Accela Civic Platform, we recommend setting up a conference call with City IT Staff to review how hardware requirements will fit into the City's existing database infrastructure to minimize costs. This conference call can occur any time prior to project kick-off.

4 Qualifications

RedMark brings a substantial amount of valuable industry experience to the table. Our management team averages 10+ years of public sector IT experience designing, developing, implementing, and supporting complex government related applications and services. Not only does our team offer significant industry experience, but that experience has been garnered by working together as a team, at RedMark and at our predecessor company. Our talented staff has exceptional resumes of specific industry expertise to help the City achieve success. We want to do more than just suggest or recommend a solution; we want to provide the products and services that become a cornerstone of the foundation of your information systems solution.

Exhibit 7 lists our proposed personnel for the City’s project.

Exhibit 7: RedMark Project Personnel

RedMark Resource	Relevant Previous Experience
Walter Chavez, Implementation Director	Mr. Chavez is has over 20 years of combined experience in government solutions, professional services and technology. He has extensive and proven abilities in, executive management, project management, systems analysis, systems design, team building and successful implementations.
Ruben Gutierrez, Services Director, Senior Project Manager	<p>Mr. Gutierrez possesses over 15 years of project management and coordination in this area. He acts as the project manager, business analyst, configuration specialist, report developer, programmer and/or quality assurance specialist in solo or team projects.</p> <p>He develops, maintains and implements project timelines and deliverables. He also maintains system life cycle procedures and documentation, and manages end user support procedures and productivity.</p>
Johan Bedoya, Technical Consultant	For 10 years, Mr. Bedoya has been converting client data from various sources (text files, Dbase, MS Access, SQL Server and Oracle) utilizing ODBC, MS Access, T-SQL, PL/SQL and Visual Basic.NET. Interfacing with project managers and clients to plan appropriate data mapping, conversion format and implementation plans. He provides support, advice and scripts for Oracle, SQL Server and MS Access databases. He creates procedures, triggers, functions and interfaces necessary for the conversion or project using PL/SQL, Transact SQL or Visual Basic .NET. Mr. Bedoya works with clients both on and offsite gathering business requirements,

RedMark Resource	Relevant Previous Experience
	performing project analysis and creating design documentation.
Lilian Rios, Implementation Consultant	Mrs. Rios has over 10 years of Business Analysis and Training experience with clients across the United States and internationally. She acts as a business analyst, configuration specialist, report specifications developer, as well as quality assurance and documentation specialist.

Resumes for the above-noted individuals are provided on the following pages.

(The remainder of this page intentionally left blank.)

Walter Chavez

Implementation Director

EXPERIENCE SNAPSHOT

INDUSTRY

Government
Information
Technology
Research
Pharmaceuticals
Insurance
Petrochemicals

SPECIALIZATION

Project
Management
Business and
Process
Analysis
Documentation
Implementation
System Testing
Team
Development

BACKGROUND

Business and technology professional with over 18 years of corporate and entrepreneurial experience. Managed profitable growth of corporate divisions and start-up ventures. Solid team building and professional leadership skills. Global experience (US, Europe, Latin America, Australia, and Middle East). Strong in the areas of advanced information technologies, business development, and technology management. Diverse client management and industry experience. Combines management skills with performance to effectively lead organizations. Experienced in rapid change environments through internal growth and acquisitions.

EXPERIENCE

RedMark Technologies, Boca Raton, FL

2006 – Present

Principal

Mr. Chavez has worked closely with Accela Services since 2005 and has successfully managed the deployment and implementation of the Accela software products. He has been involved in all aspects of the implementation lifecycle, from initial kickoff and analysis through to go-live and post production support. Mr. Chavez has worked with varied departments in the government sector such as Community Development, Building Department for cities and counties, Planning, Code Enforcement, Service Request (311), Public Works and more. He has been involved in all aspects of the

project lifecycle, specifically having performed:

- ▶ Executive Management
- ▶ Project Management
- ▶ Analysis and Configuration
- ▶ Report Specifications
- ▶ Accela Add on (ACA, AMO, AGIS) Requirements Analysis
- ▶ Training
- ▶ Go-Live Support
- ▶ Consulting Services on existing projects

Partial list of projects and engagements:

- Brevard County FL
- Charlotte County, FL
- City of Fort Worth, TX
- Jackson County, FL
- Maricopa County, AZ
- Reedy Creek Improvement District, FL

- Butts County, GA
- City of Indianapolis, IN
- City of Lenexa, KS
- City of Virginia Beach, VA
- Cobb County, GA
- Escambia County FL
- San Diego County, CA
- St. Joseph, MO
- St. Louis County, MO
- State of South Carolina
- University of Minnesota
- Wyandotte County, KS

The Aleriant Corporation, Fort Lauderdale, FL

2001 – 2006

President and CEO

Established international technology outsourcing company with clients in the United States and overseas. Structured and negotiated private placement investments as well as development guidelines for technology and business goals. Managed and directed marketing efforts to expand operations internationally with partners as well as clients.

Vertical City, LLC, Boca Raton, FL

1999 – 2001

Partner, Chief Technology Officer

Led the development of client and partner relationships. Authored and produced business plans, along with executive level presentations for venture and investment capital. Presented business model as public speaker. Had full responsibility for multi-million dollar contracts negotiation and management. Responsible for legal issues such as intellectual property, copyright protection, and patent filing processes.

Internet.com, Westport, NY

1996 – 1999

IT Project Manager

- ▶ Identified, developed and implemented enterprise-wide e-commerce solutions.
- ▶ Managed E-commerce processes generating over \$2.3 MM month-over-month.
- ▶ Responsible for growth in online revenue generation from non-existence to an excess of \$1.8 MM in 30 days.
- ▶ Coordinated online registration processes between financial institutions and internal departments.
- ▶ Developed and implemented real-time databases access through online registration information from Web site.
- ▶ Personally responsible for the design and implementation of real-time credit card transaction processing data flow for all internet.com research reports and newsletter subscriptions.
- ▶ Project Management
- ▶ Analysis and Configuration

Gartner Group, Stamford, CT

1994 – 1996

Solutions Architect

Web Architect and Developer. Deployed intranet delivery solutions for corporate research.

Xerox, Stamford, CT

1992 – 1994

Client IT Relationship Manager

Technology support for installed base. Account management and client support for leasing division.

EDUCATION

BSIT in Business Systems Analysis, University of Phoenix

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Ruben Gutierrez

Services Director, Senior Project Manager

EXPERIENCE SNAPSHOT

INDUSTRY

Government
Information
Technology
Telecommunications

SPECIALIZATION

Project Management
Process Analysis
Implementation
Documentation
Data Management
Quality Assurance

BACKGROUND

Experienced engineer with a proven track record of progressive management practice, team leadership and technical skills. Strong business and technical vision with effective people skills to allow close work with senior management. Ability to manage multiple projects for internal and external customers. Creative problem solver oriented towards getting results with an aptitude for learning. Can maximize resources while possessing a sense of urgency. Will work "hands-on" when required but understands the value and importance of delegating work and responsibilities, having worked across several positions (SQL Server Database Administrator (DBA), Webmaster and MIS Manager) and fields (Accounting, Reporting, Support, Training, Retail, Customer Service, Government, Patient management) in the IT industry.

EXPERIENCE

REDMARK TECHNOLOGIES, LLC

July 2007 - Present

ACCELA PROJECT EXPERIENCE

Responsibilities:

Mr. Gutierrez has deployed and implemented both the Land Management and Asset Management suite of Accela products for various departments in multiple jurisdictions in the areas of Building, Planning, Zoning, Code Enforcement, Service Request (311), Environmental Services, Public Works and more. He has been involved in all aspects of the project lifecycle, specifically having performed:

- Analysis
- Configuration
- Data Conversion (multiple environments)
- Interface Development
- Script Development
- Report Specification and Development
- Accela Citizen Access (ACA) Configuration and Implementation
- Accela Mobile Office (AMO) Configuration and Implementation
- Accela GIS (AGIS) Configuration and Implementation
- Training

- Go-Live Support
- Consulting Services on existing projects

Partial list of projects and engagements:

- City of Tampa, FL
- San Diego County, CA
- St. Louis County, MO
- Reedy Creek Improvement District, FL
- University of Minnesota
- Jackson County, FL
- Springfield, MA
- State of South Carolina
- City of Indianapolis, IN
- City of Virginia Beach, VA
- Brevard County FL
- Escambia County FL
- Wyandotte County, KS
- City of Lenexa, KS

VERIZON – DATABASE ADMINISTRATOR

January 2006 – July 2007

Responsibilities:

- Administer and optimize 40+ Microsoft SQL servers assigned to internal Infrastructure Department.
- Discuss SLAs and ITIL strategies with developers and related departments.
- Assist with report development, Apple connectivity, Linux installation and deployment.
- Imparted Oracle Reports Developers 10g course in Dominican Republic.
- Imparted Oracle 10g Java Programming course in Puerto Rico.
- Imparted Oracle Portal and Oracle Java for Portals courses in Venezuela.

VF DIGITAL STORE – INFORMATION TECHNOLOGY MANAGER

March 2004 – December 2005

Responsibilities:

- Automated all the warranty process and optimized technician's training.
- Reduced customer service department by half while improving response at the same time.
- Oversaw the development and implementation of the customer service application and integration with the Accounting department.
- Developed and deployed caller handling software.

MACSA – CUSTOMER SERVICE MANAGER

February 1995 – December 2003

KAUBECK – TECHNICAL SUPPORT

January 1992 – December 1994

EDUCATION

BS in Systems Engineering, PUCMM University, 1991

Johan Bedoya

Technical Consultant

EXPERIENCE SNAPSHOT

INDUSTRY

Government
Financial
Information
Technology
Software
Development

SPECIALIZATION

IT Project
Management
Implementation
Development
Support
Quality Assurance

BACKGROUND

Experienced engineer with a proven track record of CMMI practice, strong record of outstanding achievements in business analysis, software development, change management, system integrations, team leadership and technical skills. Ability to manage multiple projects for internal and external customers. Creative problem solver oriented towards getting results with an aptitude for learning.

EXPERIENCE

REDMARK TECHNOLOGIES

July 2009 – Present

ACCELA PROJECT EXPERIENCE

IMPLEMENTATION CONSULTANT, SAN DIEGO COUNTY, CA

January 2012 - Present

Responsibilities:

Implementation Consultant focused on technical support report development using Microsoft Reporting Services 2008 and Oracle 10g.

IMPLEMENTATION CONSULTANT, INDIANAPOLIS, IN

January 2011 – March 2012

Responsibilities:

Implementation Consultant focused on technical support report development using Crystal Reports 10 and SQL Server 2008.

IMPLEMENTATION CONSULTANT, JACKSON COUNTY, FL

October 2010 – November 2011

Responsibilities:

Implementation Consultant for Accela Civic Platform Land Management deployment. Worked on documentation and configuration for Land Planning, Permitting, Business Licensing, Code Enforcement and Service Request modules. Worked on Reports and Data Conversion.

IMPLEMENTATION CONSULTANT, CITY OF LENEXA, KS

September 2007 – July 2009

Responsibilities:

Implementation Consultant for Accela Civic Platform Land Management deployment. Worked on documentation and configuration for Land Planning, Permitting, Business Licensing, Code Enforcement and Service Request modules. Worked on Reports and Data Conversion.

ALERIAN, LLC / S.A.

October 2002 – July 2009

Responsibilities:

Oversaw development staff of 40 multi-discipline/multi-platform programmers, DBAs, and designers. Develop solutions for Pharmaceutical, Banking, Manufacturing, Chemicals, and IT industries. Focused on web-based application development as well COTS development. Performed CIO and COO functions.

METRIK SOLUTIONS, S.A.

August 2000 – September 2002

Responsibilities:

IT Project Manager. Developed programs and applications in C, C++, and Delphi. Delivered projects using Extreme Programming (XP) and Unified Process (UP) methodologies.

NETSAC, S.A.

June 1998 – June 2000

Responsibilities:

Programmer and IT Developer. Developed and deployed programs, applications and software solutions in Perl, C, C++, and Oval applying Rational Unified Process (RUP) methodology.

EDUCATION

BS in Systems Engineering, UCC University, 2000

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Lilian Rios

Implementation Consultant

EXPERIENCE SNAPSHOT

INDUSTRY

Government
Information
Technology

SPECIALIZATION

Process Analysis
Documentation
Implementation
Quality Assurance

BACKGROUND

Mrs. Rios is an experienced Business Analyst and Trainer. She has over years 10 years of business-technology experience with the last 5 years on various project management roles. Mrs. Rios has been directly involved in several enterprise-wide Land Management system implementations. A successful team leader with effective communication skills, Mrs. Rios is a strategic planner with the ability to effectively and efficiently resolve issues and problems. Mrs. Rios has been responsible for managing best practices implementation for Building, Planning, Permitting, Inspections and Code Enforcement from Discovery through Implementation. Responsibilities include analysis and documentation, configuration, data conversion, reporting, testing, training, go-live support and more. Assist team members in successful resolution of problems as they arise to minimize impact on project timeline.

EXPERIENCE

REDMARK TECHNOLOGIES, LLC

July 2006 – Present

ACCELA PROJECT EXPERIENCE

IMPLEMENTATION CONSULTANT, UNIVERSITY OF MINNESOTA

August 2010 – November 2011

Responsibilities:

Implementation Consultant for a new Accela Civic Platform installation of the Land Management module for the Building Code Division (BCD) of the University of Minnesota. Focused on developing documentation for existing and processes and infrastructure. Configured system based on documentation. Assisted in deployment and configuration of Accela Citizen Access (ACA).

IMPLEMENTATION CONSULTANT, JACKSON COUNTY, FL

October 2010 – November 2011

Responsibilities:

Solutions Specialist and Implementation Consultant for a new Accela Civic Platform installation. Focused on developing documentation for existing and future processes. Worked with client to implement Land Planning, Permitting, Business Licensing, Code Enforcement and Service Request modules. Assisted in the data conversion effort and implementation of the web portal, wireless and GIS integrations.

IMPLEMENTATION CONSULTANT, CITY OF LENEXA, KS

January 2008 – July 2009

Responsibilities:

Implementation Consultant, Configuration Document Development Consultant working on Implemented Service Request and Building Module, Report Specification and Development using SQL reporting Services 2005.

IMPLEMENTATION CONSULTANT, MIAMI DADE FIRE RESCUE

May 2007 – January 2008

Responsibilities:

Implementation Consultant for an Accela Civic Platform Upgrade focused on Document Management and technical support, developing all the documentation process and some event manager scripts for automate different functions across the agency as well helping with the data mapping for the data migration.

ALERIAN, LLC

March 2003 – May 2006

Responsibilities:

Meet with clients to gather requirements for custom software development projects. Document business processes and define goals to be achieved by the custom solution. Develop and metrics for the success of projects, and participate Q&A testing of custom solution while interfacing with programmers and IT personnel in overseas development centers.

ACK BUSINESS TOOLS, INC

September 2001 – March 2003

Responsibilities:

Participated in the successful implementation of CMMI in a multinational environment. Responsible for budget and target deadlines across multiple projects. Financial responsibility for a portfolio of projects across multiple industries. Pre and post sales support activities.

VIRINITY, LLC

October 1999 – July 2001

Responsibilities:

Business Analysis documentation and requirements gathering for a multi-platform software solution. Combined multiple technologies and developed metrics for the Software Development Life Cycle (SDLC). Participated in pre-sales activities with potential clients. Coordinated project development among multiple teams of developers and IT managers.

EDUCATION

BS in IT Management, Palm Beach State College

4.1 Onsite versus Offsite

We expect that the vast majority of hours proposed for implementation services herein will be performed offsite.

4.2 Continuity of Skilled Vendor Resources

RedMark Solutions can provide the City with the software and services necessary to ensure success in the timeframe desired by the City, on time and on budget. Developing an Accela implementation strategy and providing professional services, along with guidance, advice, best practices experience, and the technical abilities to deliver the solution, is exactly the type of service that RedMark has successfully delivered on numerous occasions. RedMark has been involved with many successful implementations from start to finish, and can offer those accounts as references for the City to contact.

4.3 Working During Normal Business Hours

We expect that staff will perform most activities during normal business hours. However, during go-live, the evaluation stage of the conversion requires that a great deal of work in a short window of time. This will likely be the exception where our team will be working outside normal business hours.

4.4 Resource Requirements for Vendor Staff and Configuration

The resource needs of the RedMark team will be minimal. Our team members will use our own RedMark issued laptops. Ongoing team member needs will be limited to no more than two basic workstations with desks, internet access and power while on site. Meeting room access will be required periodically, but the time and frequency of meetings will be determined jointly by all involved parties. RedMark resources have no need for reserved parking, telephones, white boards, or flipcharts.

4.5 Recommended City Resources

When staffing the Accela Civic Platform implementation, it is important to consider available resources, internal skills, competing priorities, and project timing.

Exhibit 8 represents RedMark’s recommended client-side staffing to support a large, single phase, multi-departmental enterprise implementation with more than 100 users. This guideline assumes an apprenticeship approach to implementation. RedMark’s Professional Services team will execute project tasks while also transferring system maintenance and configuration knowledge to agency staff.

Exhibit 8: City Staffing Recommendations

Role	Implementation FTE	Support FTE	Notes
Executive Sponsor	0.05	0.05	<ul style="list-style-type: none"> Executive who initiated/approved the project and is accountable for project success and its overall return on investment. Attendance at Steering Committee/Executive meetings and addressing key project issues comprise the majority of the time required. Project communication and motivation activities will require additional time of the Executive Sponsor.
Departmental Directors/Managers	0.1	0.05	<ul style="list-style-type: none"> Department level owner who is accountable for the operation of the department and sets the vision for the to-be state. These individuals’ attendance at bi-weekly status meetings and workshops ensures the requirements are being properly communicated. Escalation and validation activities will also require sporadic involvement of Departmental Directors/Managers.
IT Project Manager	.5	0.1	<ul style="list-style-type: none"> Depending on the specific goals after go-live, the role of the IT Project Manager can vary; however, a minimum of 50% PM dedication during the project will ensure that the project is timely and high quality. The role of the IT Project Manager will decrease over time, and will be replaced by general support and maintenance.
Business Analyst/Superuser/Liaison	2.0 (1.0 minimum per department, 2.0 per department recommended)	0.25	<ul style="list-style-type: none"> The Business Analyst/Superuser is a resource that has technical strength and complete knowledge of business processes. This individual can assist in determining and documenting requirements, as well as making configuration changes. Report writing ability recommended, although if dedicated report writers exist, the Business Analyst/Superuser role can be more business-oriented.

Role	Implementation FTE	Support FTE	Notes
			<ul style="list-style-type: none"> In practice, the two FTE per department is often comprised of multiple individuals. Tasks during and after implementation include gathering of requirements, execution of test plans and ongoing training of new resources. Post deployment activities may include report and script specification and development, simple adjustment of workflow, and general support of departmental staff's use of add-on products.
Infrastructure Support	0.2	0.1	<ul style="list-style-type: none"> Involvement of Infrastructure Support personnel will be sporadic but dense, with most activity occurring around installation and go-live. The 0.2 FTE usually comprised of network administrators, server administrators, and other technical resources and their time is focused on access and infrastructure maintenance. Upgrades and patches will require dedicated time (8-16) consecutive hours. When Accela Citizen Access is deployed, a webmaster is required for initial setup and some ongoing maintenance.
System Administrator	1.0	0.5	<ul style="list-style-type: none"> The System Administrator is responsible for the general maintenance of the system, as well as user ID maintenance. Typically training a primary and a backup is the best practice. The system administrator leads the application of software patches and upgrade releases (2-4 days typically) to prepare, test, etc.
GIS Administrator	0.25	0.25	<ul style="list-style-type: none"> The amount of time required of the GIS Administrator is dependent on the maturity and size of the GIS department; however, during implementation, the setup and testing of the Accela GIS module will require significant time. Ongoing maintenance is typically related to layer updates, new dynamic themes, etc.
Database Administrator	.25	0.1	<ul style="list-style-type: none"> Knowledge of the database is critical for the data conversion process, system interface design, and a general understanding of the Accela Civic Platform system design. Ongoing Database Administrator support will vary but will not be heavy. Application of patches and upgrades will require increased involvement of the Database Administrator.
Report Developers	1.0	1.0	<ul style="list-style-type: none"> Report development needs change and grow over time; therefore, if the skills and availability are resident within the agency, it is recommended that at least one (1) Report Developer is available.

Role	Implementation FTE	Support FTE	Notes
Legacy System Administrators	0.25	0.05	<ul style="list-style-type: none"> Where applicable, resources with business and technical knowledge of the systems that will interface with Accela Civic Platform are critical. Most of this work occurs during implementation, unless interface specifications change over time, or incumbent systems are replaced.
Testing Resources	4.0	0.5	<ul style="list-style-type: none"> Testing Resources should comprise a combination of technical and business personnel, and are most frequently Superusers and specific testing staff. The importance of an ongoing testing strategy and plan is paramount in this process.
Help Desk	.05	0.5	<ul style="list-style-type: none"> Help Desk support is a minor role in the implementation; however this individual requires administration training to understand Accela Civic Platform. Ongoing support requirements depend largely on staffing and volume of issues encountered.

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5 On-Going Support and Maintenance

Accela's Customer Resource Center (CRC), based in Visalia, California, provides live technical support between 7:00 a.m. and 9:00 p.m. EST, Monday through Friday, excluding Accela-observed holidays.

The CRC is responsible for:

- ▶ Providing information in a timely and professional manner
- ▶ Performing best efforts to resolve any incidents submitted
- ▶ Documenting each incident and its resolution
- ▶ Escalating incidents to other Accela departments as necessary
- ▶ Tracking the duration of open incidents and ensure forward progress
- ▶ Communicating the progress of open incidents with customers up to and including resolution
- ▶ Delivering fixes and workarounds for any incidents

The CRC responds to all client issues and routes technical incidents accordingly based on the nature of the incident.

5.1 Support Services

Pursuant to Accela's standard Maintenance Agreement (included in proposal section 11), the following items are considered Maintenance Services, and included in the Accela's Annual Maintenance.

The minimum response time for all types of requests is two hours.

The average response time for the past 12 months has been one hour.

- ▶ **Telephone Support:** Accela provides a telephone number to contact the Customer Resource Center (CRC), Accela's live technical support facility.
- ▶ **E-Mail Support:** Accela will provide one or more electronic mail addresses to which a customer may submit routine or non-critical support requests 24 hours a day, which Accela will address during its regular business hours.
- ▶ **Online Support:** Accela will provide access to archived software updates and other technical information in Accela's online support databases, which are available 24 hours a day.
- ▶ **Remote Support:** When required to properly resolve a maintenance request, Accela will provide remote assistance via the WebEx™ Meeting

Center™ environment or another mutually-acceptable remote communications method.

- ▶ **On-Site Support:** If remote support is not acceptable, Accela can provide on-site assistance, which will be billed at Accela's then-current time and materials rates. In addition to these charges, compensation for associated airfare, lodging, rental transportation, meals, and other incidental expenses will be billed as accrued.
- ▶ **Software Updates:** Accela will provide revisions of and enhancements to maintained software products as such updates are generally-released by Accela. Software updates and supporting documentation will be delivered or made available to customers for electronic download from Accela's File Transfer Protocol ("FTP") site.

5.2 Software Upgrades

As a SaaS deployment, the City of Gainesville will automatically be on the latest release of Civic Platform. Ample notice will be given of updates, and any new features are turned off by default to minimize impact on end-users, giving the system administrators full control of phasing in any new features.

5.3 User Groups and Other Methods of Support

User groups for Accela Civic Platform and Accela Mobile Office actively discuss products and share experiences to improve the use of their Accela products on Accela's online forum. These groups are designed as a resource for, and by, those who know the product best – the users.

Other methods of client support include:

- ▶ **Accela Online Community:** Accela's public community website is where Accela's product experts blog about industry news, preview new features and upcoming product releases. The Community is open to Accela customers, prospects, and partners to learn about Accela products, discuss ideas for how to get the most out of their Accela system, and share tips and tricks with others.
- ▶ **Accela Annual User Conference:** This annual event in August brings together hundreds of users, administrators, IT managers, and other government officials for four-days of product training, breakout sessions, presentations, networking events, partner solutions, exciting activities, and more. Based on the overwhelming response from last year's conference poll on Accela Community (<http://community.accela.com/>), the 2012 Annual User Conference will be held in San Diego, California at the Paradise Point Resort from August 13-17. Please visit

<http://www.paradisepoint.com/> for more information about this unique location.

- ▶ **Ongoing User Group and Tradeshow Events:** Accela posts all user group events in the events section on the Accela website.
- ▶ **Accela Knowledge Base:** Accela's searchable online Knowledge Base gives all users access to answers to many commonly asked questions about Accela products.
- ▶ **Accela Newsletter:** Accela's quarterly newsletter keeps customers informed of company events, product information, company news, new technology, and product updates.
- ▶ **Accela Partner Program:** Accela leverages the experience, talent, and skills of its business partners, which consist of software, hardware, services, and reseller companies that are dedicated to providing best-of-breed solutions for the public sector.

5.4 Escalation Procedures

When the CRC receives an incident report, it is tracked until final resolution. The assigned CRC representative communicates incident progress, and email notifications are sent at critical milestones. The escalation process follows the following path:

- ▶ **Initiation:** All information provided to the Customer Resource Center is entered into Accela's tracking system; the incident is assigned an identification number and a CRC representative.
 - **For Requests for Information:** the CRC representative provides the information and either closes the incidents or escalates to the appropriate resource.
 - **For Usage Questions:** the CRC representative explains to the customer how to accomplish the task in question. The incident is then closed.
 - **For Software Issues:** After confirming that the issue is not related to usage, the CRC representative performs an issue analysis to determine the cause of the incident.
 - **For Enhancements:** The CRC representative gathers information about the requested enhancement, and escalates the incident to the appropriate resource within Accela, based on the request.
 - **For Service Requests:** The CRC representative communicates and escalates the request to the appropriate Accela sales representative.
- ▶ **Analysis:** Once a software issue is reported, the CRC will attempt to replicate, analyze, research, and diagnose the cause of the issue. The customer may be asked to provide additional information, screenshots, or

files to demonstrate the issue. Once resolved, and prior to closing the incident, the customer is asked to test the resolution. In the event that the CRC representative cannot resolve the issue, it is escalated to the appropriate resource.

- ▶ **Escalation to Sales:** Incident escalation to Accela’s Sales team occurs when a product enhancement or service is requested. The Sales representative will coordinate with Accela’s Engineering and/or Services teams to prepare a cost estimate for the requested service. Upon customer approval, a purchase order is generated and Accela will provide the requested enhancement or service.
- ▶ **Escalation to Engineering:** Escalation to Accela’s Engineering Team occurs when a modification to an existing product or module is required or requested. After an initial evaluation, the Engineering Team provides an estimated completion date. Accela’s Quality Assurance staff evaluates each fix, patch, or workaround before it is sent to the CRC for distribution. Once the CRC receives the fix, patch, or workaround, it is delivered to by e-mail or through Accela’s FTP site.

5.4.1 Client Testing / Acceptance

Any time a fix, patch, or workaround, is delivered, the CRC will assist with the install and testing, as necessary. If testing reveals that the incident is satisfactorily resolved, the incident is closed; otherwise, the incident is escalated to Accela’s Engineering team.

Once a solution is confirmed as satisfactorily resolving the issue, it is closed and no longer actively tracked by the CRC. A closed incident can be reopened at any time if the issue needs to be readdressed.

5.4.2 Incident Severity, Response and Resolution

As incidents are reported to the CRC, incident severity is assessed based on the table below. Reported incidents are triaged based on the impact the issue has on business operations and the severity of other issues reported. Accordingly, necessary resources are assembled to resolve the issue based on issue severity.

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Exhibit 9: Accela Customer Resource Center Incident Severity, Response, and Resolution

Issue Severity	Criteria	Examples	Response Goals	Resolution Goals
Critical	System or application is non-functional or seriously affected and there is no reasonable workaround available.	<ul style="list-style-type: none"> ▪ Users cannot log on ▪ Corrupted data ▪ Business process is halted 	<ul style="list-style-type: none"> ▪ Confirm receipt of issue description within 1 business hour. ▪ Provide follow-up every 60 minutes. 	Upon confirmation of receipt, Accela continuously works to resolve the issue. Accela will put forth best efforts to provide a workaround, fix, or estimated completion date within 48 hours of the problem being diagnosed and / or replicated, provided there is a customer representative available to assist in the diagnosis and testing during the resolution process.
Severe	System or application is affected and there is no workaround available or the workaround is impractical	<ul style="list-style-type: none"> ▪ Cannot print permits ▪ Cannot process payments ▪ Application response times prohibitively slow 	<ul style="list-style-type: none"> ▪ Confirm receipt of issue description within 4 business hours. ▪ Provide follow-up every 48 hours. 	Accela will put forth best efforts to provide a workaround or fix within 7 business days of the problem being diagnosed and / or replicated.
Moderate	System or application feature is non-functional and a convenient workaround exists.	<ul style="list-style-type: none"> ▪ A non-critical feature is unavailable ▪ Feature still works but requires additional user intervention 	<ul style="list-style-type: none"> ▪ Confirm receipt of issue description within 8 business hours. ▪ Provide follow-up every 7 days. 	Accela will put forth best efforts to provide a workaround or fix within 14 business days of the problem being diagnosed and/or replicated.
Low	System or application feature works, but there is a minor problem	<ul style="list-style-type: none"> ▪ Incorrect labels on forms or reports ▪ Missing or incomplete help page 	<ul style="list-style-type: none"> ▪ Confirm receipt of issue description with 24 business hours. ▪ Provide follow-up every 14 days. 	Resolution for the issue may be released as a patch set or may be incorporated into a future release of the product.