

**PROFESSIONAL SERVICES AGREEMENT
BETWEEN THE CITY OF SAN BERNARDINO
AND GRAY QUARTER, INC.**

This Agreement is made and entered into as of **November 20, 2024** by and between the City of San Bernardino, a charter city and municipal corporation organized and operating under the laws of the State of California with its principal place of business at Vanir Tower, 290 North D Street, San Bernardino, CA 92401 (“City”), and **Gray Quarter, Inc.** a **CA Corporation** with its principal place of business at **8575 Morro Rd, Atascadero, CA 93422** (hereinafter referred to as “Consultant”). City and Consultant are hereinafter sometimes referred to individually as “Party” and collectively as the “Parties.”

RECITALS

A. City is a public agency of the State of California and is in need of professional services for the following project:

Accela Civic Platform Implementation (hereinafter referred to as “the Project”).

B. Consultant is duly licensed and has the necessary qualifications to provide such services.

C. The Parties desire by this Agreement to establish the terms for City to retain Consultant to provide the services described herein.

NOW, THEREFORE, IT IS AGREED AS FOLLOWS:

AGREEMENT

1. Incorporation of Recitals. The recitals above are true and correct and are hereby incorporated herein by this reference.

2. Services. Consultant shall provide the City with the services described in the Scope of Services attached hereto as Exhibit “A.”

3. Professional Practices. All professional services to be provided by Consultant pursuant to this Agreement shall be provided by personnel identified in their proposal. Consultant warrants that Consultant is familiar with all laws that may affect its performance of this Agreement and shall advise City of any changes in any laws that may affect Consultant’s performance of this Agreement. Consultant further represents that no City employee will provide any services under this Agreement.

4. Compensation.

a. Subject to paragraph 4(b) below, the City shall pay for such services in accordance with the Schedule of Charges set forth in Exhibit “A.”

b. In no event shall the total amount paid for services rendered by

Consultant under this Agreement exceed the sum of **\$2,100,336**. This amount is to cover all related costs, and the City will not pay any additional fees for printing expenses. Consultant may submit invoices to City for approval. Said invoice shall be based on the total of all Consultant's services which have been completed to City's sole satisfaction. City shall pay Consultant's invoice within forty-five (45) days from the date City receives said invoice. The invoice shall describe in detail the services performed and the associated time for completion. Any additional services approved and performed pursuant to this Agreement shall be designated as "Additional Services" and shall identify the number of the authorized change order, where applicable, on all invoices.

5. Additional Work. If changes in the work seem merited by Consultant or the City, and informal consultations with the other party indicate that a change is warranted, it shall be processed in the following manner: a letter outlining the changes shall be forwarded to the City by Consultant with a statement of estimated changes in fee or time schedule. An amendment to this Agreement shall be prepared by the City and executed by both Parties before performance of such services, or the City will not be required to pay for the changes in the scope of work. Such amendment shall not render ineffective or invalidate unaffected portions of this Agreement.

a. Adjustments. No retroactive price adjustments will be considered. Additionally, no price increases will be permitted during the first year of this Agreement, unless agreed to by City and Consultant in writing.

6. Term. This Agreement shall commence on the Effective Date and continue through **June 30th, 2027** unless the Agreement is previously terminated as provided for herein ("Term").

7. Maintenance of Records; Audits.

a. Records of Consultant's services relating to this Agreement shall be maintained in accordance with generally recognized accounting principles and shall be made available to City for inspection and/or audit at mutually convenient times for a period of four (4) years from the Effective Date.

b. Books, documents, papers, accounting records, and other evidence pertaining to costs incurred shall be maintained by Consultant and made available at all reasonable times during the contract period and for four (4) years from the date of final payment under the contract for inspection by City.

8. Time of Performance. Consultant shall perform its services in a prompt and timely manner and shall commence performance upon receipt of written notice from the City to proceed. Consultant shall complete the services required hereunder within Term.

9. Delays in Performance.

a. Neither City nor Consultant shall be considered in default of this Agreement for delays in performance caused by circumstances beyond the reasonable control of the non-performing Party. For purposes of this Agreement, such

circumstances include a Force Majeure Event. A Force Majeure Event shall mean an event that materially affects the Consultant's performance and is one or more of the following: (1) Acts of God or other natural disasters occurring at the project site; (2) terrorism or other acts of a public enemy; (3) orders of governmental authorities (including, without limitation, unreasonable and unforeseeable delay in the issuance of permits or approvals by governmental authorities that are required for the services); and (4) pandemics, epidemics or quarantine restrictions. For purposes of this section, "orders of governmental authorities," includes ordinances, emergency proclamations and orders, rules to protect the public health, welfare and safety.

b. Should a Force Majeure Event occur, the non-performing Party shall, within a reasonable time of being prevented from performing, give written notice to the other Party describing the circumstances preventing continued performance and the efforts being made to resume performance of this Agreement. Delays shall not entitle Consultant to any additional compensation regardless of the Party responsible for the delay.

c. Notwithstanding the foregoing, the City may still terminate this Agreement in accordance with the termination provisions of this Agreement.

10. Compliance with Law.

a. Consultant shall comply with all applicable laws, ordinances, codes and regulations of the federal, state and local government, including Cal/OSHA requirements.

b. If required, Consultant shall assist the City, as requested, in obtaining and maintaining all permits required of Consultant by federal, state and local regulatory agencies.

c. If applicable, Consultant is responsible for all costs of clean up and/ or removal of hazardous and toxic substances spilled as a result of his or her services or operations performed under this Agreement.

11. Standard of Care. Consultant's services will be performed in accordance with generally accepted professional practices and principles and in a manner consistent with the level of care and skill ordinarily exercised by members of the profession currently practicing under similar conditions. Consultant's performance shall conform in all material respects to the requirements of the Scope of Work.

12. Conflicts of Interest. During the term of this Agreement, Consultant shall at all times maintain a duty of loyalty and a fiduciary duty to the City and shall not accept payment from or employment with any person or entity which will constitute a conflict of interest with the City.

13. City Business Certificate. Consultant shall, prior to execution of this Agreement, obtain and maintain during the term of this Agreement a valid business registration certificate from the City pursuant to Title 5 of the City's Municipal Code and any and all other licenses, permits, qualifications, insurance, and approvals of

whatever nature that are legally required of Consultant to practice his/her profession, skill, or business.

14. Assignment and Subconsultant. Consultant shall not assign, sublet, or transfer this Agreement or any rights under or interest in this Agreement without the written consent of the City, which may be withheld for any reason. Any attempt to so assign or so transfer without such consent shall be void and without legal effect and shall constitute grounds for termination. Subcontracts, if any, shall contain a provision making them subject to all provisions stipulated in this Agreement. Nothing contained herein shall prevent Consultant from employing independent associates and subconsultants as Consultant may deem appropriate to assist in the performance of services hereunder.

15. Independent Consultant. Consultant is retained as an independent contractor and is not an employee of City. No employee or agent of Consultant shall become an employee of City. The work to be performed shall be in accordance with the work described in this Agreement, subject to such directions and amendments from City as herein provided. Any personnel performing the work governed by this Agreement on behalf of Consultant shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such personnel, including, but not limited to: social security taxes, income tax withholding, unemployment insurance, and workers' compensation insurance.

16. Insurance. Consultant shall not commence work for the City until it has provided evidence satisfactory to the City it has secured all insurance required under this section. In addition, Consultant shall not allow any subcontractor to commence work on any subcontract until it has secured all insurance required under this section.

a. Additional Insured

The City of San Bernardino, its officials, officers, employees, agents, and volunteers shall be named as additional insureds on Consultant's and its subconsultants' policies of commercial general liability and automobile liability insurance using the endorsements and forms specified herein or exact equivalents.

b. Commercial General Liability

(i) The Consultant shall take out and maintain, during the performance of all work under this Agreement, in amounts not less than specified herein, Commercial General Liability Insurance, in a form and with insurance companies acceptable to the City.

(ii) Coverage for Commercial General Liability insurance shall be at least as broad as the following:

Insurance Services Office Commercial General Liability coverage (Occurrence Form CG 00 01) or exact equivalent.

(iii) Commercial General Liability Insurance must include coverage for the following:

- (1) Bodily Injury and Property Damage
- (2) Personal Injury/Advertising Injury
- (3) Premises/Operations Liability
- (4) Products/Completed Operations Liability
- (5) Aggregate Limits that Apply per Project
- (6) Explosion, Collapse and Underground (UCX) exclusion deleted
- (7) Contractual Liability with respect to this Contract
- (8) Broad Form Property Damage
- (9) Independent Consultants Coverage

(iv) The policy shall contain no endorsements or provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or suits by one insured against another; (3) products/completed operations liability; or (4) contain any other exclusion contrary to the Agreement.

(v) The policy shall give City, its elected and appointed officials, officers, employees, agents, and City-designated volunteers additional insured status using ISO endorsement forms CG 20 10 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(vi) The general liability program may utilize either deductibles or provide coverage excess of a self-insured retention, subject to written approval by the City, and provided that such deductibles shall not apply to the City as an additional insured.

c. Automobile Liability

(i) At all times during the performance of the work under this Agreement, the Consultant shall maintain Automobile Liability Insurance for bodily injury and property damage including coverage for owned, non-owned and hired vehicles, in a form and with insurance companies acceptable to the City.

(ii) Coverage for automobile liability insurance shall be at least as broad as Insurance Services Office Form Number CA 00 01 covering automobile liability (Coverage Symbol 1, any auto).

(iii) The policy shall give City, its elected and appointed officials, officers, employees, agents and City designated volunteers additional insured status.

(iv) Subject to written approval by the City, the automobile liability program may utilize deductibles, provided that such deductibles shall not apply to the City as an additional insured, but not a self-insured retention.

d. Workers' Compensation/Employer's Liability

(i) Consultant certifies that he/she is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and he/she will comply with such provisions before commencing work under this Agreement.

(ii) To the extent Consultant has employees at any time during the term of this Agreement, at all times during the performance of the work under this Agreement, the Consultant shall maintain full compensation insurance for all persons employed directly by him/her to carry out the work contemplated under this Agreement, all in accordance with the "Workers' Compensation and Insurance Act," Division IV of the Labor Code of the State of California and any acts amendatory thereof, and Employer's Liability Coverage in amounts indicated herein. Consultant shall require all subconsultants to obtain and maintain, for the period required by this Agreement, workers' compensation coverage of the same type and limits as specified in this section.

e. Professional Liability (Errors and Omissions)

At all times during the performance of the work under this Agreement the Consultant shall maintain professional liability or Errors and Omissions insurance appropriate to its profession, in a form and with insurance companies acceptable to the City and in an amount indicated herein. This insurance shall be endorsed to include contractual liability applicable to this Agreement and shall be written on a policy form coverage specifically designed to protect against acts, errors or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

f. Privacy/Network Security (Cyber)

At all times during the performance of the work under this Agreement, the Consultant shall maintain privacy/network security insurance for: (1) privacy breaches, (2) system breaches, (3) denial or loss of service, and the (4) introduction, implantation or spread of malicious software code, in a form and with insurance companies acceptable to the City.

h. Minimum Policy Limits Required

(i) The following insurance limits are required for the Agreement:

Combined Single Limit

Commercial General Liability	\$2,000,000 per occurrence/\$4,000,000 aggregate for bodily injury, personal injury, and property damage
Automobile Liability	\$1,000,000 per occurrence for bodily injury and property damage
Employer's Liability	\$1,000,000 per occurrence
Professional Liability	\$1,000,000 per claim and aggregate (errors and omissions)
Cyber Liability	\$1,000,000 per occurrence and aggregate

(ii) Defense costs shall be payable in addition to the limits.

(iii) Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance. Any available coverage shall be provided to the parties required to be named as Additional Insured pursuant to this Agreement.

i. Evidence Required

Prior to execution of the Agreement, the Consultant shall file with the City evidence of insurance from an insurer or insurers certifying to the coverage of all insurance required herein. Such evidence shall include original copies of the ISO CG 00 01 (or insurer's equivalent) signed by the insurer's representative and Certificate of Insurance (Acord Form 25-S or equivalent), together with required endorsements. All evidence of insurance shall be signed by a properly authorized officer, agent, or qualified representative of the insurer and shall certify the names of the insured, any additional insureds, where appropriate, the type and amount of the insurance, the location and operations to which the insurance applies, and the expiration date of such insurance.

j. Policy Provisions Required

(i) Consultant shall provide the City at least thirty (30) days prior written notice of cancellation of any policy required by this Agreement, except that the Consultant shall provide at least ten (10) days prior written notice of cancellation of any such policy due to non-payment of the premium. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to the City at least ten (10) days prior to the effective date of cancellation or expiration.

(ii) The Commercial General Liability Policy and Automobile Policy shall each contain a provision stating that Consultant's policy is primary insurance and that any insurance, self-insurance or other coverage maintained by the City or any named insureds shall not be called upon to contribute to any loss.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this Agreement. Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) All required insurance coverages, except for the professional liability coverage, shall contain or be endorsed to provide waiver of subrogation in favor of the City, its officials, officers, employees, agents, and volunteers or shall specifically allow Consultant or others providing insurance evidence in compliance with these specifications to waive their right of recovery prior to a loss. Consultant hereby waives its own right of recovery against City, and shall require similar written express waivers and insurance clauses from each of its subconsultants.

(v) The limits set forth herein shall apply separately to each insured against whom claims are made or suits are brought, except with respect to the limits of liability. Further the limits set forth herein shall not be construed to relieve the Consultant from liability in excess of such coverage, nor shall it limit the Consultant's indemnification obligations to the City and shall not preclude the City from taking such other actions available to the City under other provisions of the Agreement or law.

k. Qualifying Insurers

(i) All policies required shall be issued by acceptable insurance companies, as determined by the City, which satisfy the following minimum requirements:

(1) Each such policy shall be from a company or companies with a current A.M. Best's rating of no less than A:VII and admitted to transact in the business of insurance in the State of California, or otherwise allowed to place insurance through surplus line brokers under applicable provisions of the California Insurance Code or any federal law.

l. Additional Insurance Provisions

(i) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by the City, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including, but not limited to, the provisions concerning indemnification.

(ii) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, City has the right but not the duty to obtain the insurance it deems necessary and any premium paid by City will be promptly reimbursed by Consultant or City will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, City may cancel this Agreement.

(iii) The City may require the Consultant to provide complete copies of all insurance policies in effect for the duration of the Project.

(iv) Neither the City nor the City Council, nor any member of the City Council, nor any of the officials, officers, employees, agents or volunteers shall be personally responsible for any liability arising under or by virtue of this Agreement.

m. Subconsultant Insurance Requirements. Consultant shall not allow any subcontractors or subconsultants to commence work on any subcontract until they have provided evidence satisfactory to the City that they have secured all insurance required under this section. Policies of commercial general liability insurance provided by such subcontractors or subconsultants shall be endorsed to name the City as an additional insured using ISO form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, City may approve different scopes or minimum limits of insurance for particular subcontractors or subconsultants.

17. Indemnification.

a. To the fullest extent permitted by law, Consultant shall defend (with counsel reasonably approved by the City), indemnify and hold the City, its elected and appointed officials, officers, employees, agents, and authorized volunteers free and harmless from any and all claims, demands, causes of action, suits, actions, proceedings, costs, expenses, liability, judgments, awards, decrees, settlements, loss, damage or injury of any kind, in law or equity, to property or persons, including wrongful death, (collectively, "Claims") in any manner arising out of, pertaining to, or incident to any alleged acts, errors or omissions, or willful misconduct of Consultant, its officials, officers, employees, subcontractors, consultants or agents in connection with the performance of the Consultant's services, the Project, or this Agreement, including without limitation the payment of all damages, expert witness fees, attorneys' fees and other related costs and expenses. This indemnification clause excludes Claims arising from the sole negligence or willful misconduct of the City. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by the City, the City Council, members of the City Council, its employees, or authorized volunteers. Consultant's indemnification obligation shall survive the expiration or earlier termination of this Agreement.

b. If Consultant's obligation to defend, indemnify, and/or hold harmless arises out of Consultant's performance as a "design professional" (as that term is defined under Civil Code section 2782.8), then, and only to the extent required by Civil Code section 2782.8, which is fully incorporated herein, Consultant's indemnification obligation shall be limited to the extent which the Claims arise out of,

pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant in the performance of the services or this Agreement, and, upon Consultant obtaining a final adjudication by a court of competent jurisdiction, Consultant's liability for such claim, including the cost to defend, shall not exceed the Consultant's proportionate percentage of fault.

18. California Labor Code Requirements. Consultant is aware of the requirements of California Labor Code Sections 1720 *et seq.* and 1770 *et seq.*, as well as California Code of Regulations, Title 8, Section 16000, *et seq.*, ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects. If the Services are being performed as part of an applicable "public works" or "maintenance" project, as defined by the Prevailing Wage Laws, Consultant agrees to fully comply with such Prevailing Wage Laws, if applicable. Consultant shall defend, indemnify and hold the City, its elected officials, officers, employees and agents free and harmless from any claims, liabilities, costs, penalties or interest arising out of any failure or alleged failure to comply with the Prevailing Wage Laws. It shall be mandatory upon the Consultant and all subcontractors to comply with all California Labor Code provisions, which include but are not limited to prevailing wages (Labor Code Sections 1771, 1774 and 1775), employment of apprentices (Labor Code Section 1777.5), certified payroll records (Labor Code Sections 1771.4 and 1776), hours of labor (Labor Code Sections 1813 and 1815) and debarment of contractors and subcontractors (Labor Code Section 1777.1).

If the Services are being performed as part of an applicable "public works" or "maintenance" project, then pursuant to Labor Code Sections 1725.5 and 1771.1, the Consultant and all subconsultants performing such Services must be registered with the Department of Industrial Relations. Consultant shall maintain registration for the duration of the Project and require the same of any subconsultants, as applicable. This Project may also be subject to compliance monitoring and enforcement by the Department of Industrial Relations. It shall be Consultant's sole responsibility to comply with all applicable registration and labor compliance requirements.

19. Verification of Employment Eligibility. By executing this Agreement, Consultant verifies that it fully complies with all requirements and restrictions of state and federal law respecting the employment of undocumented aliens, including, but not limited to, the Immigration Reform and Control Act of 1986, as may be amended from time to time, and shall require all subconsultants and sub-subconsultants to comply with the same.

20. Laws and Venue. This Agreement shall be interpreted in accordance with the laws of the State of California. If any action is brought to interpret or enforce any term of this Agreement, the action shall be brought in a state or federal court situated in the County of San Bernardino, State of California.

21. Termination or Abandonment

a. City has the right to terminate or abandon any portion or all of the work under this Agreement by giving ten (10) calendar days' written notice to Consultant. In such event, City shall be immediately given title and possession to all

original field notes, drawings and specifications, written reports and other documents produced or developed for that portion of the work completed and/or being abandoned. City shall pay Consultant the reasonable value of services rendered for any portion of the work completed prior to termination. If said termination occurs prior to completion of any task for the Project for which a payment request has not been received, the charge for services performed during such task shall be the reasonable value of such services, based on an amount mutually agreed to by City and Consultant of the portion of such task completed but not paid prior to said termination. City shall not be liable for any costs other than the charges or portions thereof which are specified herein. Consultant shall not be entitled to payment for unperformed services, and shall not be entitled to damages or compensation for termination of work.

b. Consultant may terminate its obligation to provide further services under this Agreement upon ninety (90) calendar days' written notice to City only in the event of substantial failure by City to perform in accordance with the terms of this Agreement through no fault of Consultant.

22. Attorneys' Fees. In the event that litigation is brought by any Party in connection with this Agreement, the prevailing Party shall be entitled to recover from the opposing Party all costs and expenses, including reasonable attorneys' fees, incurred by the prevailing Party in the exercise of any of its rights or remedies hereunder or the enforcement of any of the terms, conditions, or provisions hereof. The costs, salary, and expenses of the City Attorney's Office in enforcing this Agreement on behalf of the City shall be considered as "attorneys' fees" for the purposes of this Agreement.

23. Responsibility for Errors. Consultant shall be responsible for its work and results under this Agreement. Consultant, when requested, shall furnish clarification and/or explanation as may be required by the City's representative, regarding any services rendered under this Agreement at no additional cost to City. In the event that an error or omission attributable to Consultant's professional services occurs, Consultant shall, at no cost to City, provide all other services necessary to rectify and correct the matter to the sole satisfaction of the City and to participate in any meeting required with regard to the correction.

24. Prohibited Employment. Consultant shall not employ any current employee of City to perform the work under this Agreement while this Agreement is in effect.

25. Costs. Each Party shall bear its own costs and fees incurred in the preparation and negotiation of this Agreement and in the performance of its obligations hereunder except as expressly provided herein.

26. Documents. Except as otherwise provided in "Termination or Abandonment," above, all original field notes, written reports, Drawings and Specifications and other documents, produced or developed for the Project shall, upon payment in full for the services described in this Agreement, be furnished to and become the property of the City.

27. Organization. Consultant shall assign Carson Goldberg as Project Manager. The Project Manager shall not be removed from the Project or reassigned without the prior written consent of the City.

28. Limitation of Agreement. This Agreement is limited to and includes only the work included in the Project described above.

29. Notice. Any notice or instrument required to be given or delivered by this Agreement may be given or delivered by depositing the same in any United States Post Office, certified mail, return receipt requested, postage prepaid, addressed to the following addresses and shall be effective upon receipt thereof:

CITY:

City of San Bernardino
Vanir Tower, 290 North D Street
San Bernardino, CA 92401
Attn: **City Manager**

With Copy To:

City of San Bernardino
Vanir Tower, 290 North D Street
San Bernardino, CA 92401
Attn: **City Attorney**

CONSULTANT:

Gray Quarter, Inc
8575 Morro Rd
Atascadero, CA 93422
Attn: Brian Weber
Chief Revenue Officer
brian@grayquarter.com

30. Third Party Rights. Nothing in this Agreement shall be construed to give any rights or benefits to anyone other than the City and the Consultant.

31. Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer and that it shall not discriminate against any employee or applicant for employment because of race, religion, color, national origin, ancestry, sex, age or other interests protected by the State or Federal Constitutions. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination.

32. Entire Agreement. This Agreement, including Exhibit "A," represents the entire understanding of City and Consultant as to those matters contained herein, and supersedes and cancels any prior or contemporaneous oral or written understanding, promises or representations with respect to those matters covered hereunder. Each Party acknowledges that no representations, inducements, promises, or agreements have been made by any person which are not incorporated herein, and that any other agreements shall be void. This is an integrated Agreement.

33. Severability. If any provision of this Agreement is determined by a court of competent jurisdiction to be invalid, illegal, or unenforceable for any reason, such determination shall not affect the validity or enforceability of the remaining terms and

provisions hereof or of the offending provision in any other circumstance, and the remaining provisions of this Agreement shall remain in full force and effect.

34. Successors and Assigns. This Agreement shall be binding upon and shall inure to the benefit of the successors in interest, executors, administrators and assigns of each Party to this Agreement. However, Consultant shall not assign or transfer by operation of law or otherwise any or all of its rights, burdens, duties or obligations without the prior written consent of City. Any attempted assignment without such consent shall be invalid and void.

35. Non-Waiver. The delay or failure of either Party at any time to require performance or compliance by the other Party of any of its obligations or agreements shall in no way be deemed a waiver of those rights to require such performance or compliance. No waiver of any provision of this Agreement shall be effective unless in writing and signed by a duly authorized representative of the Party against whom enforcement of a waiver is sought. The waiver of any right or remedy with respect to any occurrence or event shall not be deemed a waiver of any right or remedy with respect to any other occurrence or event, nor shall any waiver constitute a continuing waiver.

36. Time of Essence. Time is of the essence for each and every provision of this Agreement.

37. Headings. Paragraphs and subparagraph headings contained in this Agreement are included solely for convenience and are not intended to modify, explain, or to be a full or accurate description of the content thereof and shall not in any way affect the meaning or interpretation of this Agreement.

38. Amendments. Only a writing executed by all of the Parties hereto or their respective successors and assigns may amend this Agreement.

39. City's Right to Employ Other Consultants. City reserves its right to employ other consultants, including engineers, in connection with this Project or other projects.

40. Prohibited Interests. Consultant maintains and warrants that it has neither employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, City shall have the right to rescind this Agreement without liability. For the term of this Agreement, no official, officer or employee of City, during the term of his or her service with City, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

41. Counterparts. This Agreement may be executed in one or more counterparts, each of which shall be deemed an original. All counterparts shall be construed together and shall constitute one single Agreement.

42. Authority. The persons executing this Agreement on behalf of the Parties hereto warrant that they are duly authorized to execute this Agreement on behalf of said Parties and that by doing so, the Parties hereto are formally bound to the provisions of this Agreement.

43. Electronic Signature. Each Party acknowledges and agrees that this Agreement may be executed by electronic or digital signature, which shall be considered as an original signature for all purposes and shall have the same force and effect as an original signature.

44. Disciplinary Actions in Phases for Non-Performance. Failure for Consultant to perform its obligations under this Agreement or comply with the Performance Indicators may result in disciplinary action as follows:

(i) Informal Warning (Written or Verbal). Consultant is given a warning in regards to non-performance. If a verbal warning is issued, it will be confirmed with an electronic correspondence to the Consultant.

(ii) Formal Written Warning. A formal written warning is issued to Consultant pursuant to Section 29 of this Agreement. Consultant must respond within 5 to 10 days of receipt of the formal warning. Upon response from the Consultant, Consultant shall be provided a reasonable time to make corrections to their performance. This time period

(iii) Formal Penalty Issued. A penalty of 15% of the Consultant's current invoice amount or annual contract amount is deducted for non-performance after previous warnings have been issued.

(iv) Termination of Contract. If the performance has not been corrected after all warnings and previous penalties have been exhausted, City may terminate the contract pursuant to Section 21 of this Agreement.

[SIGNATURES ON FOLLOWING PAGE]

**SIGNATURE PAGE FOR PROFESSIONAL SERVICES AGREEMENT
BETWEEN THE CITY OF SAN BERNARDINO
AND GRAY QUARTER, INC.**

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the date first written above.

CITY OF SAN BERNARDINO

CONSULTANT

APPROVED BY:

Brian Weber

Rochelle Clayton
City Manager

Signature

Brian Weber
Name

ATTESTED BY:

Chief Revenue Officer
Title

Genoveva Rocha
City Clerk

10/28/2024
Date

APPROVED AS TO FORM:

Best Best & Krieger LLP
City Attorney

EXHIBIT A

Page left intentionally blank, Statement of work begins on following page

Gray Quarter, Inc.



RFP F-23-78 SOW

prepared for **City of San Bernardino, CA**

Document Control

Date	Author	Version	Changes
08/20/2024	Larry Cooper	1.0	Initial
08/28/2024	Brian Weber	1.1	Final Draft
09/23/2024	Brian Weber	2.0	Redline Responses
10/02/2024	Brian Weber	2.1	Final Revisions

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Overview

This Statement of Work ("SOW") dated August 29, 2024 describes how Gray Quarter, Inc. ("Gray Quarter") will provide the City of San Bernardino, CA ("Client") with Accela Civic Platform implementation and configuration assistance (collectively known as "Services").

Services Description

The Client is seeking Gray Quarter to implement an integrated land management system utilizing best practices, automated workflow, online portal capabilities, mobile solutions, and other modern technology.

The high-level objectives include:

- Replace the existing Land Management system,
- Improve and streamline operational/business processes, including the reduction of manual paper processes and redundant shadow systems,
- Improve automated workflows,
- Improve integrations between application systems,
- Adopt the use of best business practices.

Critical Success Factors

To successfully execute the Services described herein, several critical success factors must be closely monitored and managed by Gray Quarter and Client stakeholders:

Dedicated Client Participation and Governance – The client acknowledges that its staff has the appropriate skills, available time, and system subject matter expertise. Knowledgeable staff will be actively involved throughout the project to deliver the roles and responsibilities defined and required of the Client. In addition, the Client will assign a Product Owner empowered to make decisions and accountable for maximizing business value delivered to the Client. The Product Owner will direct the team to the highest priority work. Lastly, project governance must support the team by making timely decisions, mitigating risks, and resolving issues rapidly.

Clear Business Objectives – The client has documented their business objectives before the commencement of the project and shared those objectives with Gray Quarter.

Product Backlog Identified and Documented – Client and Gray Quarter identify, document, prioritize, and continually manage the Client's technical, functional, data, and any other requirements (expressed as User Stories) that must be satisfied for the project to be considered successful by the Client and Gray Quarter.

Business Process Definition and Understanding – The client must be able to articulate the desired business processes.

Knowledge Transfer – It is critical that Client resources are dedicated to increasing their knowledge of the Accela Civic Platform by participating in the analysis, configuration, and deployment of the software. The Client must be prepared to assume day-to-day operations of Accela Civic Platform outside of the Support and Maintenance Agreement. Key knowledge transfer areas include:

- Configuration
- Interfaces
- Business Rule Automation
- Reports and Forms
- Release Management

Scope of Services

The following sections define this SOW's scope and delivery approach, describing each item listed below.

Scope of Work

The project scope includes implementing and customizing seventy (73) record types, as outlined below. Although the specific four-level record structure and application aliases are not provided here, they will be established when developing the story for each record ID. The Client will work with Gray Quarter to establish a release strategy for each record type listed below within the project 2-year timeframe.

Each record type will also be evaluated for implementation in the Gray Quarter Wizard (refer to RFP Response: Appendix A and BAFO Response Appendix G2-H-I) during the '**Foundation Analysis Sprint**' to rectify problem areas for complex online application business processes. The Client will work with Gray Quarter to implement a series of filtering questions for each record type identified during the '**Foundation Analysis Sprint**,' which routes the citizen to the correct final record submission in the Gray Quarter Wizard (refer to BAFO Response Appendix G2-H-I).

During the 'Foundation Analysis Sprint' Gray Quarter and Client will determine the record types that will utilize ePermitHub's Digital Plan Room (hereinafter referred to as 'DPR') (refer to RFP Response: Appendix A and BAFO Response Appendix G2-H-I) software interface. The sprints will be prioritized to allow for the implementation of the record and digital plan review software at the same time, if applicable. The implementation of DPR interface will be entwined with the development of the record type and the baseline DPR configuration and automation to ensure the implementation follows agile methods.

Table 1. Record Types (in scope)

ID	Department	Record Type
R-1	Planning	Pre-Application
R-2	Planning	Administrative Permit
R-3	Planning	General Plan Amendment
R-4	Planning	Tentative Parcel Map
R-5	Planning	Annexation/De-Annexation
R-6	Planning	Tentative Tract Map
R-7	Planning	Appeals
R-8	Planning	Final Parcel Map
R-9	Planning	Code Amendments
R-10	Planning	Final Tract Map
R-11	Planning	Conceptual Plan Review
R-12	Planning	Lot Line Adjustments
R-13	Planning	Development Plan
R-14	Planning	Lot Mergers
R-15	Permits	Accessory Dwelling Unit
R-16	Permits	Mechanical
R-17	Permits	Solar/Photovoltaic
R-18	Permits	Alterations/Remodel
R-19	Permits	Reroof
R-20	Permits	Residential Building
R-21	Permits	Water Heater
R-22	Permits	Certificate of Occupancy
R-23	Permits	Sign Permit
R-24	Permits	Demolition
R-25	Permits	Home Occupation Permit
R-26	Permits	Electrical
R-27	Permits	Temporary Use
R-28	Permits	Fences
R-29	Permits	Grading Permit
R-30	Permits	Landscape Permit
R-31	Permits	Haul Permit
R-32	Permits	Traffic Hydrology Stormwater Permit
R-32	Permits	Wide Load Permit
R-34	Permits	Swimming Pool Drainage Permit
R-35	Permits	Stockpile Permit
R-36	Permits	Off-Site Improvements
R-37	Permits	Right of Way
R-38	Permits	Wall Permit
R-39	Permits	Sidewalk Vendor
R-40	Permits	Encroachment Permit
R-41	Permits	Parcel Map, Tract Map

R-42	Permits	Lot Line Adjustment
R-43	Permits	Lot Merger
R-44	Code Case	Construction without a permit
R-45	Code Case	Substandard Housing
R-46	Code Case	Commercial Enforcement
R-47	Code Case	Vehicle Abatement
R-48	Code Case	Multi-Family Rental Program
R-49	Code Case	Vendor Enforcement
R-50	Code Case	Hazardous Conditions
R-51	Code Case	Vacant Lot
R-52	Code Case	Marijuana Dispensary
R-53	Code Case	Yard Sale
R-54	Code Case	NOP Request
R-55	Code Case	Doing Business without an Active Business License
R-56	Code Case	Property Maintenance
R-57	Code Case	Single Family Rental Program
R-58	Request Management	Single Record that supports (requests, complaints, suggestions, compliments by location)
R-59	Licensing	Application Record
R-60	Licensing	License Record
R-61	Licensing	Renewal Record
R-62	Licensing	Application Record 2
R-63	Licensing	License Record 2
R-64	Licensing	Renewal Record 2
R-65	Licensing	Application Record 3
R-66	Licensing	License Record 3
R-67	Licensing	Renewal Record 3
R-68	Licensing	Application Record 4
R-69	Licensing	License Record 4
R-70	Licensing	Renewal Record 4
R-71	TBD	TBD – Extra for records not listed in RFP Response: Appendix A
R-72	TBD	TBD – Extra for records not listed in RFP Response: Appendix A

Reports

No reports were specifically provided in the RFP Response: Appendix A. The following is a generic list of the types of reports the team will provide. The team will evaluate all reports and provide a type of Executive, SSRS, or Ad Hoc report and determine if they are assigned to the Client or Gray Quarter.

- Reports are defined as any output of data from the system, such as letters, forms, queries, dashboards, data exports, etc.

- Reports will be developed using reporting tools as provided by Accela and/or supported in the Accela Cloud (e.g., PowerBI, Microsoft SQL Report Services, Crystal Reports, Accela Ad-Hoc Reports).

Table 3. Reference Tab “BAFO Response Appendix G2-H-I” Reports & Inquiry Development

#	Report Name	Report Description	Report Complexity
RPT.01	Report One	Executive Dashboard Permitting	Low Complexity
RPT.02	Report Two	Executive Dashboard Planning	Low Complexity
RPT.03	Report Three	Executive Dashboard Enforcement	Low Complexity
RPT.04	Report Four	Executive Dashboard Requests	Low Complexity
RPT.05	Report Five	Executive Dashboard Licensing	Low Complexity
RPT.06	Report Six	State reporting	Medium Complexity
RPT.07	Report Seven	State reporting	Medium Complexity
RPT.08	Report Eight	State reporting	Medium Complexity
RPT.09	Report Nine	Letter Generation	Low Complexity
RPT.10	Report Ten	Letter Generation	Low Complexity
RPT.11	Report Eleven	Letter Generation and Batch Notice	Low Complexity
RPT.12	Report Twelve	Standard SSRS Report	Medium Complexity
RPT.13	Report Thirteen	Standard SSRS Report	Medium Complexity
RPT.14	Report Fourteen	Standard SSRS Report	Medium Complexity
RPT.15	Report Fifteen	Standard SSRS Report	Medium Complexity
RPT.16	Report Sixteen	Standard SSRS Report	Medium Complexity
RPT.17	Report Seventeen	Standard SSRS Report	Medium Complexity
RPT.18	Report Eighteen	Standard SSRS Report	Medium Complexity
RPT.19	Report Nineteen	Standard SSRS Report	Medium Complexity
RPT.20	Report Twenty	Standard SSRS Report	Medium Complexity
RPT.21	Report Twenty-One	Standard SSRS Report	Medium Complexity
RPT.22	Report Twenty-Two	Standard SSRS Report	Medium Complexity
RPT.23	Report Twenty-Three	Standard SSRS Report	Medium Complexity
RPT.24	Report Twenty-Four	Standard SSRS Report	Medium Complexity
RPT.25	Report Twenty-Five	Standard SSRS Report	Medium Complexity
RPT.26	Report Twenty-Six	Standard SSRS Report	Medium Complexity
RPT.27	Report Twenty-Seven	Standard SSRS Report	Medium Complexity
RPT.28	Report Twenty-Eight	Standard SSRS Report	Medium Complexity
RPT.29	Report Twenty-Nine	Standard SSRS Report	Medium Complexity

RPT.30	Report Thirty	Standard SSRS Report	Medium Complexity
RPT.31	Report Thirty-One	Standard SSRS Report	Medium Complexity
RPT.32	Report Thirty-Two	Accela Ad-Hoc	Low Complexity
RPT.33	Report Thirty-Three	Accela Ad-Hoc	Low Complexity
RPT.34	Report Thirty-Four	Accela Ad-Hoc	Low Complexity
RPT.35	Report Thirty-Five	Accela Ad-Hoc	Low Complexity
RPT.36	Report Thirty-Six	Accela Ad-Hoc	Low Complexity
RPT.37	Report Thirty-Seven	Accela Ad-Hoc	Low Complexity
RPT.38	Report Thirty-Eight	Accela Ad-Hoc	Low Complexity
RPT.39	Report Thirty-Nine	Accela Ad-Hoc	Low Complexity
RPT.40	Report Forty	Accela Ad-Hoc	Low Complexity
RPT.41	Report Forty-One	Standard SSRS Report	High Complexity
RPT.42	Report Forty-Two	Standard SSRS Report	High Complexity
RPT.43	Report Forty-Three	Standard SSRS Report	High Complexity

Definition of Report Complexity

The list of complexity definitions below was produced and provided by the Client. The definitions below will be leveraged to implement each of the reports above.

Complexity Level	Description
Low Complexity	Reports that require a simple pull from a limited number of database fields and presentation on a document. Examples include letters such as Certificates of Occupancy, notices, and mailing labels.
Medium Complexity	Reports that require some calculations and summaries. Examples include forms and transaction reports (receipts, permits, inspection tickets, journals, logs). Many agency reports fall under this category.
High Complexity	Reports that require complex queries, joins, multiple sources, etc. Examples include statistical and analytical reports, schedules, and agendas.

Business Automation (Scripting/EMSE)

The Event Manager and Scripting Engine (EMSE) comprise the Accela Civic Platform scripting platform. The Civic Platform stores the script files, written in JavaScript, in the Civic Platform database.

Scripting is necessary to create business rules above and beyond native Civic Platform functionality. Gray Quarter will provide Scripting/EMSE based on complexity (minimal, moderate, and complex).

- **Fifty (50)** High Complexity – batch scripts (e.g., license expiration notice), page flow scripts
- **Ninety (90)** Medium Complexity – event scripts (e.g., auto-assign inspections, populating custom fields from GIS, placing a condition on a record based on custom fields and/or GIS data elements), pre- and post-scripts, and scripting expressions (non-wizard based)
- **Sixty (60)** Low Complexity – configurable scripts, wizard-based expressions

Interfaces (In scope)

The following interfaces from the Gray Quarter response are provided. The “vendor comment” column identifies if the interface is a standard feature, subscription product, or custom development.

Table 4. – Reference tab “BAFO Response Appendix G2-H-I”

Interface ID	Name	Description	Interface Direction	Third-Party Software	Frequency / Real-Time Active	Integration Type	Vendor Comments
ID.1	Cashiering & Online Payments	Cash receipts should validate permit number, account number, fees, penalty amounts, and update customer balance.			As Needed		This is a standard feature in Accela. Pricing for the provider is below with "All Paid"
ID.2	Customer Internet Payments	Online payments with provider "All Paid"	Two-way	AllPaid	As Needed	Export	Typically, all payment interfaces are one way originating from the software to the payment vendor. We believe this should be a one way and the pricing is based on that assumption.
ID.3	Customer Over the Counter Payments	In person payments			As Needed		This is a standard feature in Accela.
ID.4	Enterprise Financial System	Provide the automatic generation of journal entries to the general ledger, ensuring auto updates	Two-way		Real-Time	Export	We do not recommend tracking AR in an external system and pushing back to Accela, as a result that is assumed to be one way.

		to the accounts receivable and accounts payable accounts.					
ID.5	Electronic Plan Submittals	Ability to receive plan submittals electronically through the Agency's website.	Two-way		As Needed	Import	We are recommending ePermitHubs software that integrates seamlessly into the Accela Public Portal and Back Office. Please refer to Appendix A for the ePermitHub Digital Plan Room Scope of Work.
ID.6	Contractor Information	Ability to extract contractor information from the state licenses board and populate fields in permit modules contractor database.	One-way	Unknown. State Website.	As Needed	Import	We will implement the standard CSLB interface that all California Accela clients leverage.
ID.7	Inspections (including mobile)	Ability to integrate with an interactive voice response system for inspection scheduling, status updates, and payments.			Real-Time		We are recommending using the Gray Quarter Rapid Scheduler instead of IVR
ID.8	Email Integration	Ability to send emails from system utilizing standard SMTP protocols.	Two-way		Real-Time		Standard Feature in Accela just minor configuration
ID.9	Single Sign-On / Active Directory	Support of Single-Sign-On and Active Directory.	Two-way	Microsoft Azure	Real-Time		Standard Feature in Accela just minor configuration
ID.10	Ad Hoc Third-Party Report Writers	Ability to integrate with third party report writers.					Accela integrates with Microsoft BI, SSRS, Crystal Reports, and has a built-in Ad Hoc tool. Accela can

							integrate with other solutions if the reporting tool has URL based reporting
ID.11	SQL Server Reporting Services	Integrate SSRS Reporting Services into the Application for documents and statistical reporting needs.			As Needed		This is provided as part of the SaaS setup
ID.12	Agenda Software	System should integrate with PrimeGov to generate agendas.	Two-way	PrimeGov	As Needed		We would recommend leveraging the Accela APIs if PrimeGov supports the process.
ID.13	Electronic Content Management System	System must integrate with Laserfiche.	Two-way	Laserfiche	As Needed	Export	We have a standard integration that is subscription based.
ID.14	Electronic Document Signatures	Integrate electronic signatures with DocuSign and Adobe Sign.	Two-way	DocuSign or Adobe Sign	As Needed	Export	The Client would need to contract with DocSign or AdobeSign for the actual envelopes. Gray Quarter can provide the envelopes, but the Client cost direct would be much cheaper
ID.15	GIS & GIS Mapping (ESRI ArcGIS)	Ability to interface with GIS mapping products that support Esri formats.	Two-way	ESRI	Real-Time	Import	Standard Feature in Accela but requires configuration. Accela GIS will be implemented to support the base integration with Accela. All costs for rows 20, 21, 23, and 24 are included here.
ID.16	GIS - View GIS Data	Query, view, and interact with GIS data within the application.	Two-way	Application	As Needed	Import	Standard Feature in Accela but requires configuration. Accela GIS will be implemented to support the base integration with Accela.
ID.17	GIS - Auto Sync GIS Changes	Automatically synchronize any changes from GIS	Two-way	System	Real-Time	Import	With how Accela integrates to ESRI this may not be needed.

		with the system.					
ID.18	GIS - Secure Service Support	Consume data through secured services.	Two-way	Services	As Needed	Import	Standard Feature in Accela but requires configuration. Accela GIS will be implemented to support the base integration with Accela.
ID.19	GIS - Feature Services	Consume and edit GIS data through Feature Services.	Two-way	Services	As Needed	Import	Standard Feature in Accela but requires configuration. Accela GIS will be implemented to support the base integration with Accela.
ID.20	Two-Factor Authentication (2FA)	Support Two-Factor Authentication (2FA).	Two-way	2FA	As Needed		This would be part of Azure Active Directory and not implemented in Accela but IDP.
ID.21	Rest API	Provide a REST API interface to facilitate querying data and integration.		Integration			Accela provides a robust set of Rest APIs out of the box, publicly available, specifications are at developer.accela.com .
ID.22	Symbium	Integration with solar application solution.		Integration			Integration exists

Data Conversions

Data Conversion Execution – The Client is responsible for the data cleansing and transformation of data during each Sprint. Gray Quarter will work with the Client team in defining a time to develop the data map to execute a conversion script against the dataset provided by Client. Gray Quarter will convert each source up to three times based upon an approved data map. For the purpose of determining data quality, Gray Quarter will use the initial run of the data to compare it against the source dataset provided by Client. Gray Quarter will share data anomalies and work with Client in modifying a data map if any are required. Gray Quarter will play a supportive consultative role with data extraction, data cleansing, and/or mapping up to 200hrs, not to exceed.

The following table is a list from the RFP Response: Appendix A and considered in scope or provides direction for how Gray Quarter will handle the data need.

For conversions, it is expected and anticipated that the client will provide resources knowledgeable with the historical data to assist in the data migration/conversion effort.

Table 5. Reference Tab “BAFO Response Appendix G2-H-I”

Conversion ID	Conversions	Description	Number of Records (Estimated)	Existing Software Product	Database Type	RFP Response: Appendix A Comments
C.1	Address/Parcel Records	File Geodatabase	76,000	ESRI ArcGIS	Undisclosed	If we convert the data as a traditional Address, Parcel, Owner load like the T32 program used in Permits Plus the hours will hold. It is suggested that we configure XAPO to pull the data directly from ESRI.
C.2	Address/Parcel Records	Records in SQL tables	70,000	PermitsPlus	SQL 2008 R2	See Comment above. The hours would not be duplicated for this effort and are estimated above.
C.3	Active Planning Projects	Records in SQL tables	N/A	PermitsPlus	SQL 2008 R2	We have assumed that the NA implies the data does not exist or will not be converted
C.4	Active Permit Applications	Records in SQL tables	N/A	PermitsPlus	SQL 2008 R2	We have assumed that the NA implies the data does not exist or will not be converted
C.5	Active Code Cases	Records in SQL tables	2,333	GoEnforce	N/A	
C.6	Active CRM Cases	Records in SQL tables	150	GoGov	N/A	
C.7	Active Business Licenses	<i>Format database can be provided to future vendor</i>	25,000	Progressive Solutions	N/A	The agency will be responsible for extracting the data into SQL Server tables
C.8	Planning Projects	Records in SQL tables	45,000	PermitsPlus	SQL 2008 R2	We use a standard process to convert data from Permits Plus to the Accela Civic Platform.
C.9	Public Works Land Development Projects	Records in SQL tables	2,000	PermitsPlus	SQL 2008 R2	We use a standard process to convert data from Permits Plus to the Accela Civic Platform.
C.10	Building Permit Records	Records in SQL tables	125,000	PermitsPlus	SQL 2008 R2	We use a standard process to convert data from Permits Plus to the Accela Civic Platform.
C.11	Public Works Permit Records	Records in SQL tables	50,000	PermitsPlus	SQL 2008 R2	We use a standard process to convert data from Permits Plus to the Accela Civic Platform.
C.12	Building Inspections	Records in SQL tables	560,000	PermitsPlus	SQL 2008 R2	We use a standard process to convert data from Permits

						Plus to the Accela Civic Platform.
C.13	Public Works Inspections	Records in SQL tables	80,000	PermitsPlus	SQL 2008 R2	We use a standard process to convert data from Permits Plus to the Accela Civic Platform.
C.14	Code Enforcement Cases	Records in SQL tables	2,333	GoEnforce	N/A	
C.15	CRM Cases	Records in SQL tables	23,000	GoGov	N/A	
C.16	Total Business Licenses	<i>Format database can be provided to future vendor</i>	25,000	Progressive Solutions	N/A	The agency will be responsible for extracting the data into SQL Server tables
C.17	Permits and Projects Attachments	<i>Each permit has a folder</i>		PermitsPlus	SQL 2008 R2	For all attachments we use a single tool to migrate and attach to the converted record. It is important to note that the base record must be converted before we can associate the attachments.
C.18	CRM Attachments	<i>Each CRM has a folder</i>		GoGov	N/A	For all attachments we use a single tool to migrate and attach to the converted record. It is important to note that the base record must be converted before we can associate the attachments.
C.19	Case Attachments	<i>Each Case has a folder</i>		GoEnforce	N/A	For all attachments we use a single tool to migrate and attach to the converted record. It is important to note that the base record must be converted before we can associate the attachments.
C.20	License Attachments	<i>Attachments details can be provided to future vendor</i>		Progressive Solutions	N/A	For all attachments we use a single tool to migrate and attach to the converted record. It is important to note that the base record must be converted before we can associate the attachments.

C.21	Entities (contractors / architects)	Records in SQL tables	20,000	PermitsPlus	SQL 2008 R2	We usually only convert the CAEDs that are attached to records and then use the CSLB lookup interface for all new records
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Gray Quarter Wizard

Implementing the Gray Quarter Wizard (G-Wiz) will consist of the following tasks:

- Provision the G-Wiz service
 - Provision API Key(s)
 - Connect G-Wiz to all Accela environments
 - Create a baseline G-Wiz decision tree
 - Provide links to the decision tree for external sites
- Conduct Business Analysis to capture requirements for the following flows (see Table 1, Record Types)
 - Application Flow in Building (40 Nodes Maximum) *
 - Application Flow in Planning (40 Nodes Maximum) *
 - Application Flow in Licensing (40 Nodes Maximum) *
 - Renewal Flow for Licensing (15 Nodes Maximum) *
 - Point and click flow for Service Requests (40 Nodes Maximum) *
 - Point and click flow for Enforcement (40 Nodes Maximum) *
 - Public Comment flow for Planning Permits (10 Nodes Maximum) *
- Configure and design the G-Wiz decision tree to meet analysis requirements
 - Record types
 - GIS layers
 - Digital plan review (required documents)
 - Required fields for fee calculations and record type decisions
 - Contractor license validation
 - Blocks or conditions

*A "Node" is defined as a unique question page within G-Wiz that will navigate the user to the next action.

The Implementation costs of the Gray Quarter Wizard are inclusive in the total lump sum stated within the Payment Terms herein (refer to BAFO Appendix G2-H-I).

Training

Training Execution – The Client will be responsible for assigning training resources at the beginning of the project so proper knowledge transfer and training can be planned and acted on as part of the Build Sprints. Any switch in team members may require the need for a project change request to account for missing time.

The following is the list of training courses in scope for the project. Gray Quarter will provide up to one hundred hours of additional time that may be used to develop custom training courses or deliver custom training.

Table 6. – Reference Tab “BAFO Response Appendix G2-H-I” Training Fees

Training ID	Training Title	Training Description	Duration	Max # of Students	Number of Class offered
T.1	Training Class - Accela Automation - Core Team	This course is an overview of the Accela Civic Platform, to help you become familiar with the basic terminology, system navigation, and core functionality of the platform. While learning Accela best practices, you will also explore design concepts, advanced configuration options, and automation possibilities. This course is recommended for project teams preparing to go through analysis sessions.	Up to 12 hours, typically 2–6-hour sessions	12	1
T.2	Training Class - Accela Automation Admin Usage	This course is designed to prepare you to take over managing your instance of Civic Platform following implementation. Dive deep into user experience design concepts and configuration options. Learn how to create different record types, study business analysis and process design. Build workflows, custom field groups, design page forms, layouts, and learn how to develop and utilize expressions. Cap that all off with exploring user security and permissions.	Up to 18 hours, typically 3–6-hour sessions	12	1
T.3	Training Class - Accela Automation End User	This course focuses on the functionality you will use daily in Civic Platform. Learn the processes of creating records, entering, and completing applications, adding fees and payments, and entering workflow information. Learn how to schedule inspections and navigate through inspection data entry. Learn how Accela Mobile is used for inspections and code compliance,	Up to 12 hours, typically 2–6-hour sessions	10	14

		explore GIS mapping, and learn about managing reviews and workflows.			
T.4	Training Class – G-Wiz	This course is designed to prepare you to take over managing your instance of G-Wiz following implementation.	Up to 6 hours, typically 2-3 hours sessions	5	1
T.5	Training Class - Accela Mobile Office	The course is recommended to prepare you for implementing Mobile Office in your instance of Civic Platform. Learn how to access job lists and records in the field and create new records in the field. Discover how to create, schedule, reschedule, cancel, and reassign inspections. Learn how to establish settings for offline and online inspections. Develop the skills to search records and inspections by creating and applying filters.	Up to 4 hours and typically 2 2-hour sessions	15	1
T.6	Training Class - Ad Hoc Report Training	This course is designed to prepare you to use reporting in the Civic Platform. Learn how to use report tools to design and develop reports and create sub-reports. Learn to deploy reports in hundreds of places throughout the Civic Platform and ACA. Practice creating expressions to concatenate or calculate at the field level. Discover how to use the form designer to create forms and letters.	Up to 4 hours, typically 2 2-hour sessions	10	1
T.7	Train the Trainer	<p>This Civic Platform course is intended to prepare identified customer trainers to train their end users.</p> <p>As a Trainer in training, you will first review the basic 2-day End- User course around the customer daily Civic Platform processes. You will then engage in workshop practice sessions where you will teach the Accela instructor and other participants sections of the 2- day end user course. Feedback will be given to help you obtain the skills needed to effectively train your end users. By the end of this course, you will have ability to train your end users in Civic Platform functions.</p>	Up to 18 hours, typically 3–6-hour sessions	10	1
T.8	Business Automation	<p>This course is designed to help you learn the basics of the Business Automation engine and understand the relationship between configuration and scripting. Explore planning, implementation, modification, and deletion of scripts. Learn about migrating to configurable business rules.</p> <p>The student is required to know JavaScripting and at a minimum have</p>	Up to 4 hours, typically 2 2-hour sessions	10	1

		attending at least 16 hours of JavaScript training.			
T.9	Digital Plan Room-End User Training	Gray Quarter will complete all the necessary training to run electronic plan review operations across applicable departments. Training materials and required training sessions will be created and conducted. Two-hour sessions for Intake Specialists/Permit Technicians with same curriculum for each session. Four-hour sessions for Plan Reviewers/Managers with same curriculum for each session.	6-hour sessions (2 hour session for Intake Specialists/Permit Technicians.	10	4
T.10	Digital Plan Room-Admin Training	Gray Quarter will provide training to Client staff focusing on the administrative and technical setup and the Digital Plan Room administration and configuration. The goal is to educate Client staff in all aspects of the Digital Plan Room solution and ensure the staff is self-sufficient before Go-Live.	4-hour sessions	10	2
T.11	Digital Plan Room-Customer Enablement Training	Gray Quarter will conduct Agency Customer Enablement training. Gray Quarter provides web-based training sessions, produces contextually relevant public-facing web-based training videos, and produces a User Guide for Agency's Customers on how to use the ePermitHub Digital Plan Room embedded in Accela Civic Access. Client publishes videos and User Guide to a dedicated Digital Plan Room information page at Client's website.	1.5 hour sessions	Customer software dependent	3
T.12	Custom Training Materials	Gray Quarter will develop up to one hundred hours of custom training materials or provide ad-hoc training. During the life of the project the team will provide loom videos and scribehow documents that should meet the needs of custom training.	Up to one hundred hours	NA	NA

User Acceptance Testing

- System testing will follow the agile methodology and occur in each of the 23 Sprints.
- The Client will commence 4 weeks of user testing in the final Sprint.
- It shall be the Client's responsibility to develop, document, and execute the user acceptance test cases throughout each sprint.
- Gray Quarter will play a supportive consultative role with the City's ownership of developing, documenting, and executing UAT test cases. This role will be time boxed at 140hrs.
- Gray Quarter will assist Client in the UAT effort and validation of system configuration.
- Gray Quarter will resolve issues resulting from Client User Testing.

- Gray Quarter will provide recommendations on testing strategy and best practices.
- Gray Quarter and the client will agree on the UAT completion date and Go-Live date.

Release Plan

The Release Plan outlines four (4) iterative Releases (Go Lives) within twenty-four (24) months and is planned as follows:

- Project startup phase (2-weeks) for plan elaboration, project kick-off meeting, and core team training.
- Sprint 0: Foundation phase (4-weeks) for building the initial Product Backlog (all work):
 - Determine required configuration to support business needs,
 - Determine required reporting needs,
 - Determine integration requirements,
 - Determine conversion data map requirements.
- Sprint 1-24: Twenty-four (24) Build Phase sprints over a 2-year period with four (4) sprints inclusive of releases to Production:
 - Sprints 1-5: Five (5) 4-week Build Phase sprints,
 - Sprint 6: 4-week Build Phase and Production release one,
 - Sprints 7-11: Five (5) 4-week Build Phase sprints,
 - Sprint 12: 4-week Build Phase and Production release two,
 - Sprints 13-17: Five (5) 4-week Build Phase sprints,
 - Sprint 18: 4-week Build Phase and Production release three,
 - Sprints 19-23: Five (5) 4-week Build Phase sprints,
 - Sprint 24: 4-week Final User Acceptance Testing and Production release four.
- 12 weeks of post-go-live support and maintenance
 - Fix severity 1 and severity 2 issues identified in post-Go Live.

Management and Governance

This section defines the project management practices, governance bodies, and associated processes.

Status Reporting

The Gray Quarter Scrum Master/Project Manager will provide a written weekly status report to the Client Project Manager and Product Owner. The Gray Quarter Scrum Master/Project Manager will publish the weekly status using PowerPoint and Jira (refer to the Project Tools section for tool information).

The weekly report will include the percentage of completion of the Product Backlog, the pass rate for the Story Tests, key project delivery milestone status, estimated completion date for each milestone,

as well as other information relevant to the delivery of the project as may be agreed upon between the parties' Product Owner and Gray Quarter Scrum Master/Project Manager.

This online collaboration tool will also track risks, action items, and issue escalations between the Gray Quarter Scrum Master/Project Manager, the Client Project Manager, and the Client Product Owner.

The project management team will meet weekly to discuss the status and review the report using Jira and/or PowerPoint.

Issue, Risk, and Action Item Management

Gray Quarter will use Jira to document project issues, action items, and risks. The project management team will review these items during the periodic management calls to assign owners, drive to due dates, and escalate to the appropriate individuals or governance body where required. The Gray Quarter Scrum Master/Project Manager will identify issues blocking team progress and impacting team velocity. If blocking issues are not resolved within two business days, the Gray Quarter Scrum Master/Project Manager will escalate to the Gray Quarter Executive and the Client oversight team for resolution.

Definition of Done and Deliverable Acceptance

Meeting quality assurance standards during each Sprint is the responsibility of the Scrum Team.

Quality assurance standards are defined in the Definition of Done for a Sprint and a Release.

Confirmation of the Definition of Done for the Sprint Backlog constitutes the Acceptance Criteria for a Sprint deliverable, as follows:

- Team member completes the Project Backlog Item (PBI) work,
- Associated configurations and code are deployed to the development environment against the current version in source control, where applicable,
- Item has passed unit testing,
- Item has been peer reviewed to confirm meeting development standards,
- Backlog Item test cases (based on the Acceptance Criteria defined for the PBI) were written and tests passed. Testers must complete testing for each PBI within the timeframe defined by the team during Sprint Planning for the Sprint,
- Regression test cases updated, as appropriate,
- Item is deployed to the test environment and has passed at least 80% of system/regression tests (regression tests as documented in acceptance criteria for previously completed PBIs). Testers must complete regression testing for the PBIs in the Sprint within the timeframe defined by the team during Sprint Planning,
- No Severity 1 or 2 defects remain for the PBI,
- The Product Owner has reviewed and moved JIRA Story to "Done".

For a Release, deliverable acceptance is conditioned upon meeting the following Definition of Done:

- Sprints planned for the Release are complete,
- The Product Backlog Items scheduled for the Release are complete,
- Code is deployed to the Production environment,
- Severity 1 and 2 defects identified during the build Sprints are resolved.

Definition of Defect, Defect Severities

A Defect is defined as a deviation from the established acceptance criteria for a PBI. The table below elaborates on the severity levels for Defects.

- **Severity Level 1:** This is a "must-fix" problem, a "showstopper." The problem is causing a major system error, fatal error, serious database corruption, serious degradation in performance, major feature malfunction, or is preventing a major business goal from being realized. The problem needs a reasonably acceptable workaround for the corresponding end-users.
- **Severity Level 2:** This is a problem causing a significant loss of feature functionality, but the system can recover from the problem, and it does not cause a total collapse of the system. The system does not meet a business goal or a portion of a business goal; performance degradation is minor but not within established exit criteria; or minor database issues may exist (e.g., single rows or fields may be locked). The problem does have a workaround that is reasonably acceptable to the corresponding end-users.
- **Severity Level 3:** This is a problem that is causing minor loss of feature functionality. Optional workarounds are acceptable but causing potential efficiency loss.
- **Severity Level 4:** This is a problem that is causing minor loss of feature functionality. Optional workarounds reasonably acceptable to the corresponding end-users are available with minor efficiency loss. Minor issues, misspellings, cosmetic changes, etc.

Change Control

Both parties recognize that there will be changes throughout this project. Change is defined as any of the following:

- Change in Scope Requirements – change in the underlying assumptions used to create this Statement of work. Examples would include changes in number of reports, number of scripts, number of data conversion sources, and data conversion source sizes (+10%).
- Change in Expense Budget
- New Product Backlog Items – The addition of a new Epic, User Story, or Product Backlog Item (PBI) is a project change. The Product Owner must approve the addition of a new PBI. The Scrum Team will estimate the new PBI and assign Story Points.

- Change to Existing PBI – Change to an existing PBI that impacts the level of effort to complete it (estimate and Story Points) is considered a project change and is documented by the Product Owner adding a new PBI to define the change. For example, a change to the Acceptance Criteria or a specification that impacts the complexity constitutes scope change. Changes impacting PBIs/ User Stories completed in a previous Sprint may require additional rework. If rework is required, the rework changes will be added to the Product Backlog as a new PBI/User Story.
- Change to Definition of Done – Changes to the Definition of Done for a Sprint or Release may impact the level of effort for completing PBIs and delivering a Release, impacting overall delivery velocity. Gray Quarter will assess proposed changes to the Definition of Done and document the impacts in a Change Order (e.g., change impacts to schedule, scope, or costs) (Please see Change Control section).
- Change in Projected Team Velocity – The velocity of the team is dependent on all team members fulfilling their assigned tasks or actions within the timeframes agreed during Sprint Planning. The team will monitor projected velocity against actual velocity. If the actual velocity falls below the projected velocity, the team will assess the root cause of this velocity impact. If the root cause is attributed to a Gray Quarter team member(s) performance or management issues, the project change and associated impact will be borne by Gray Quarter. If the velocity impact is attributed to Client team member(s) performance or management issues (such as delays in decisions or issue escalation/resolution), the project change/impact will be borne by the Client. In either case, the Product Owner will document the change and impact with support from the Gray Quarter Scrum Master/Project Manager. For velocity changes attributed to the Client that impact the overall project costs or overall Release timeline, Client will process a Change Order adjusting the deliverables/payment amounts to incorporate the additional cost.
- Non-Productive Time – Gray Quarter's price for this SOW is based on the assumption that the Gray Quarter team will have complete, timely, and accurate information and other deliverables and dependencies from the Client team, enabling the team to be productive during working hours throughout the course of the project. Issues impacting the Gray Quarter team members' productive time will be escalated to the Change Control Board (CCB) and a mutually agreed resolution must be in place within seventy-two (72) hours of the initial escalation.

No changes shall be made to Sprint Backlog (User Stories /PBIs) during the current Sprint, for either PBIs/ User Stories already delivered but not yet accepted and PBIs/ User Stories accepted.

The Product Owner can address Standard Changes by re-prioritization of the Product Backlog, with agreement from the Gray Quarter Scrum Master/Project Manager and Scrum Team. For example, if a new "must-have" User Story is identified during Sprint 2, the Product Owner can schedule the new User Story for Sprint 3 as long as a User Story of equivalent size (hours, Story Points, and sizing factors) is removed from the Product Backlog.

Changes to the Product Backlog affecting the overall project scope, level of effort, or timelines for the Release must be approved following the Extraordinary Change Order process set forth below.

Standard Change Order Process – Standard changes are items that can be addressed through reprioritization of the Product Backlog without impacting the overall scope, delivery timeline, or costs. The decision makers required for standard changes include the Gray Quarter Scrum Master/Project Manager, Client Product Owner, and Client Project Manager.

- For each change where Gray Quarter and Client agree to define as a new PBI/ User Story, the Client Product Owner completes the definition of the Story.
- The Gray Quarter team will analyze the change during the next scheduled Sprint Planning session to estimate and size (hours and Story Points) the new PBI and check against available sizing factor allowances. If the change applies to an already implemented PBI/Story, then any rework or impacts to other stories required will be added as another PBI/Story.
- The Client Product Owner must make the decision concerning the change. There are two possible options:
 - Accept the change into the Product Backlog and decide which PBI/Story (or stories) are to be removed to offset the added size (hours, points, sizing factors) or
 - Reject the change.
- Finally, the Client Product Owner will prioritize the new PBI/Story (if added) against the Product Backlog.

Extraordinary Change Order Process – If a change exceeds the baseline Product Backlog size (as defined by Story Points and sizing factors) or otherwise impact the planned number of Sprints and Release date set for the project, then the Client Product Owner will:

- Prepare a preliminary Project Change Order Form to identify the nature of the requested change.
- The Gray Quarter Scrum Master/Project Manager will work with the team to perform an assessment/review to determine the full impact on the project, including cost and timeline impacts if applicable.
- Escalate this assessment to the Client and Gray Quarter Stakeholders.

Project Management Tools

The project team will use the following tools:

- JIRA – Gray Quarter will establish a JIRA instance for the project team to use as its virtual scrum board. Gray Quarter will load the Product Backlog into JIRA and the team will use the tool during Build Sprints to organize and track work. The Gray Quarter Scrum Master/Project Manager will use this tool to monitor project metrics such as Burndown and Velocity.
- PowerPoint – Gray Quarter may summarize the information found in JIRA into two slides.

- Project – Gray Quarter will mutually develop a project schedule using Microsoft Project.

Project Governance Framework

Project Governance occurs at multiple levels to maximize business value and mitigate risks for the project.

- Project Level – Project-level governance is performed by the project management team, which consists of the Gray Quarter Scrum Master, Client Product Owner, and Client Project Manager. This team is empowered to make day-to-day decisions within the constraints of the project SOW. This team meets weekly to review project status, identify, and mitigate risks, resolve issues, and monitor action items. This team is responsible for escalating issues to the Program Level governance team where they cannot reach a resolution or otherwise avoid impacting the project scope, timeline, resources, or costs.
- Stakeholder Level – Stakeholder level governance is performed by the Gray Quarter Executive, and Client Stakeholder. This team meets bi-weekly, handles issue escalations, supports risk mitigations, and makes decisions. This group is responsible for rapidly addressing blocking issues escalated from the Project Team.

Implementation Methodology

The team will adhere to an Agile scrum framework tailored for the Accela Civic Platform. The methodology is an adaptation of Agile methods to work within this project's unique constraints of price, scope, low-risk tolerance, and deployment of the new configurations into a live Production Accela environment.

The Agile framework for this project consists of a series of four types of Sprints:

1. **Foundation Analysis Sprint (Sprint Zero)**—Upon project start, the team will begin with a Sprint Zero to create Product Backlog Items (PBI), also known as "User Stories". The source of Sprint Zero items can be a combination of Client requirements and/or best practices from other government Client configurations that are similar in nature. These items will comprise the Release Product Backlog.
2. **"Build" Sprints** – Following Sprint Zero, construction begins through a series of time-boxed build Sprints. The team uses the outputs from the Sprint Zero to inform the solution architecture, configure the solution foundation, and develop the technical components. Working software is delivered during the Sprints, with conversions, interfaces and reports all being developed and managed concurrently within the Sprint. Sprints are time-boxed to maintain the integrity of the delivery timeline. Within a Sprint, development proceeds according to the established priorities. The product developed in each Sprint is reviewed and validated by the Product Owner with support from Client SMEs, often through a facilitated walk through of each use case developed/configured in the system.

3. **Readiness (Production Release) Sprint** –During the Readiness Sprint stage the team completes final end-to-end and regression tests and promotes the software to Production.
4. **Stabilization and Transition (Post-Production) Sprint** – Following Production Go Live; the team will deliver post- Production support and system refinements through a series of Sprints. The first Sprint is the Stabilization Sprint where Gray Quarter prepares the Release for transition to the Client support team. System maintenance and refinement Sprints continue following the Stabilization period.

Team Roles and Responsibilities

A joint team comprised of Gray Quarter and Client resources will deliver this SOW. Team size and composition may vary based on the Release scope and activities underway during a given Sprint. Gray Quarter will assign the required resources to the team, which may change during a Release in response to project demands.

General Gray Quarter Responsibilities

- Development and Unit Test - Perform software configuration and development for the PBIs assigned to Gray Quarter staff in each build Sprint.
- Defect Correction - Resolve Severity 1 and 2 defects (related to PBIs assigned to Gray Quarter staff) discovered during Sprint testing within the Sprint, or according to an alternate timeline mutually agreed with Product Owner. Severity 3 and 4 defects are treated as new PBIs and prioritized by the Product Owner according to the Change Control process defined above.
- Backlog Grooming Support - Support the Product Owner in Product Backlog grooming activities by providing consultative support for defining Gray Quarter solution approaches, for up to 6 hours of Product Backlog grooming working sessions per Sprint. Any additional Product Backlog grooming tasks assigned to Gray Quarter resources (outside the allocated 6 hours per Sprint for consultation) will be treated as a new PBI and prioritized by the Product Owner according to the Change Control process described above.
- Knowledge Transfer - Enable Accela product knowledge transfer to Client resources to support the delivery of tasks assigned to Client resources and enable ramp-up of the team skillset. This will be accomplished through up to 8 hours per Sprint of open office hours or knowledge transfer work sessions targeted toward completing specific Product Backlog tasks scheduled within the current Sprint. The 8 hours for Knowledge Transfer will be allocated and defined for each Sprint during Sprint Planning. Any additional knowledge transfer tasks assigned to Gray Quarter resources (outside the allocated 8 hours per Sprint for consultation) will be treated as a new PBI and prioritized by the Product Owner according to the Change Control process described above.
- Scrum Master, Project Management, Project Oversight – Gray Quarter will assign a Scrum Master to the project to facilitate the scrum processes, such as Release and Sprint Planning,

Sprint reviews and retrospectives, and scrum meetings. In addition, the Gray Quarter Scrum Master/Project Manager will perform general project management tasks to monitor Gray Quarter resources' work, assignment of tasks, and other project management disciplines. Gray Quarter will also assign an Executive to provide oversight and act as the initial escalation point beyond the day-to-day project team.

General Client Responsibilities

- Development and Unit Test - Perform software configuration and development for the PBIs assigned to Client staff in each build Sprint.
- Defect Correction – Approve the resolution of severity 1 and 2 defects (related to PBIs assigned to Client staff) discovered during Sprint testing within the Sprint, or according to an alternate timeline mutually agreed with the Client Product Owner.
- Backlog Grooming – The Product Owner will lead continuous Product Backlog grooming and is responsible for delivering a Sprint Product Backlog that meets the Definition of Ready prior to the Sprint planning meeting. Client program area personnel and subject matter experts will perform Product Backlog grooming activities as the Product Owner directs.
- Testing – Client resources will perform testing per the timeframes defined during Sprint Planning, this includes development and execution of regression test cases that incorporate PBI Acceptance Criteria as well as confirm adherence to the Definition of Done.

Specific Team Roles

- Client Product Owner – This is a Client business lead with the following responsibilities:
 - Initial development and prioritization of the Product Backlog during Sprint 0,
 - On-going revision and re-prioritization of the Product Backlog (grooming),
 - Identification of the prioritized Sprint Backlog prior to Sprint Planning,
 - Adherence to the "Definition of Ready" for the targeted Sprint Backlog before the Sprint Planning meeting,
 - Participation on behalf of Client in scrum planning and review meetings,
 - Direct Client testers to confirm completion of Sprint Backlog items,
 - Move completed items to "Done" on the scrum board before the Sprint Review,
 - Review and sign-off on all project deliverables.
- Client Subject Matter Expert (SME) / Tester – This is a Client role with the following responsibilities:
 - Primary Client person supporting the Product Owner in creating/updating the Story/task details in the Product Backlog,
 - Provides detailed answers for business questions posed by Scrum Team members,
 - Develop, document, and execute the test cases,
 - Attends scrum meetings and is a member of the Scrum Team.

- Client Project Manager – This is a Client role with the following responsibilities:
 - Provides project and budgetary oversight and status,
 - Provides backup for Gray Quarter Scrum Master/Project Manager,
 - Attends scrum meetings and holds the scrum standup meeting.
- Gray Quarter Solution Architect(s), Script Specialist(s), Report Writer(s), Implementation Consultant(s), and Business Analyst(s):
 - Gray Quarter resources are available to provide Product Backlog grooming support to the Product Owner,
 - Define and validate Accela solution approaches and tasks during Sprint Planning and throughout the Sprint cycle,
 - Perform configuration tasks assigned to the Gray Quarter team during the build Sprints,
 - Attends scrum meetings and is a member of the Scrum Team.
- Gray Quarter Scrum Master / Project Manager:
 - Facilitates the use of the scrum methodology,
 - Organizes and leads the scrum standup meeting, Sprint Planning, Sprint Review, and Sprint Retrospective,
 - Works with Client PM to remove Scrum Team roadblocks and escalate issues as needed,
 - Monitors team velocity and prepares weekly status reports,
 - Prepares mitigation plans for project risks and performs general project management discipline-related tasks.
- Client Oversight Team – This a Client team that includes senior-level stakeholders (such as the project sponsor) and managers, and provides strategic support to help define business needs and achieve project outcomes

Delivery Approach

The project will be delivered through a series of Agile Sprints. The first Sprint (Sprint 0) is roughly 4 weeks in duration and is allocated exclusively to Product Backlog grooming and elaboration in preparation for the first build Sprint. Build Sprints are 4 weeks in duration. The final Sprints prior to the Release are allocated to Production readiness and "hardening", performing the final code promotion, data migration, and end-to-end testing before Production use.

Sprint Zero and Product Backlog Elaboration

The first Sprint for the project will consist of a Sprint 0 Product Backlog elaboration activity (Foundation Analysis). The purpose of Sprint 0 is for the Client Product Owner and the project team to create / elaborate the Product Backlog, assign Story Points, prioritize stories, and create the overall Release Plan. During the Foundation Analysis prior to finalization of the Release Plan, the team will compare the elaborated Product Backlog to the Scope as defined in this SOW to identify changes. If new or changed scope is identified during Foundation Analysis, the team will determine whether such items can be accommodated in the Release (through workshare or assignment of equivalent Product Backlog items to Client resources) or whether a Change Order (Please see Change Control section) is required to incorporate the new scope.

In addition, during Sprint 0, the team must elaborate enough Product Backlog detail to meet the "definition of ready" for Sprint 1 Planning. The Product Owner will conduct subsequent Product Backlog elaboration continuously, throughout each Release, creating elaborating enough detail to drive the subsequent Sprints. The Product Owner is responsible for identifying and prioritizing product backlog targeted for the next Sprint and elaboration work required to confirm the Sprint Backlog meets the Definition of Ready prior to the Sprint Planning session.

Sprint 0 Foundation Analysis

To complete Sprint 0, Gray Quarter will facilitate working sessions and activities to further understand and define the regulatory functions for the Client and how these workflows and functions will be automated within the Accela Civic Platform.

Integrations, imports, exports, conversions, and reports are identified in the Business Foundation Analysis from a functional perspective, in the context of the overall use cases/ User Stories.

Separate analysis for integrations (including imports and exports), conversions, and reports will commence during this phase following the business analysis sessions. These activities will complete the more detailed technical analysis, which often requires different participants than those in the business analysis sessions.

- For the conversion analysis, Gray Quarter staff will evaluate the data sources for all anticipated regulatory functions,
- For each data source, Gray Quarter will work with the Client data owner to define the conceptual data mapping to Accela, identify high level business rules and data transformations required based on the conceptual data mapping, and define the delivery/extract format Client will use to provide the datasets to Accela during Implementation. In addition, the team will identify data quality and cleaning tasks.

- Gray Quarter will identify and define conceptual solutions for reports, imports, and exports. Gray Quarter will incorporate these items into the Product Backlog by defining associated User Stories.

Sprint 0 Foundation Analysis Acceptance Criteria

The following is the acceptance criteria for the Sprint 0 deliverable:

- The Release Plan and Product Backlog accurately capture the inputs provided by Client staff during the business and technical analysis working sessions.
- The Product Backlog and related artifacts contain sufficient detail to enable the team to understand the requirements and provide accurate build estimates. All items do not require full elaboration, as additional elaboration is expected to occur during later activities. The Product Owner has assigned a priority for each Product Backlog item.
- Each Product Backlog item is assigned Story Points for purposes of understanding the relative effort to develop each item.

Definition of Ready

The criteria listed below define what the team considers readiness of Product Backlog items for scheduling into a Sprint during Sprint Planning:

- Story/PBI contains actors, problem, and value,
- Story should fit in a Sprint,
- Story is appropriately documented and ready for building. Supporting material for a Story will be attached to the appropriate "cards" in JIRA,
- Business value should be obvious, if not, it should be explicitly stated,
- Story contains verifiable, explicit acceptance criteria,
- Test case for the Story is written,
- Story focuses on business goals, not solutions.

During Sprint 0 and ongoing Product Backlog elaboration and grooming, the Product Owner (with support from the Scrum Team) performs the following activities:

- Prioritizes each PBI using the JIRA Priority field (Low, Medium, High, Critical),
- Defines and prioritizes new Product Backlog items (see Change Control section above for process),
- Identifies changes needed to existing Product Backlog items (see Change Control section above for process),
- Continuously monitors relative priorities against the Release Plan (i.e., which PBIs are targeted for each Sprint) and applies changes to the Release Plan (in collaboration with the Gray Quarter Scrum Master/Project Manager),

- Identifies PBIs for the next Sprint and elaborates sufficient details and tasks to confirm the Sprint Backlog meets the Definition of Ready prior to the Sprint Planning meeting,
- Directs the Scrum Team in the creation of test cases.

Build Sprints

Build Sprints shall begin after the completion of Sprint Zero. The Product Owner in collaboration with the Gray Quarter Scrum Master/Project Manager and Scrum Team shall select sufficient work from the current Product Backlog for Sprint 1. Based on this selected work, the team will develop an initial Sprint Backlog, and enter the build Sprint phase of the Release.

Build Sprints continue until the Release Backlog is complete and ready for the Release Readiness or "hardening" Sprints.

Prior to the actual configuration or development occurring in a Sprint, the team performs Sprint Planning to review the Product Backlog items assigned to the Sprint, identify additional details surrounding each item and establish the tangible tasks to be completed by the team. The Scrum Team establishes the Sprint Backlog based on Product Owner priorities and by an assessment of the team's capacity during the Sprint and performance (delivery velocity) from previous Sprints. During Sprint Planning, the team commits to deliver a distinct set of User Stories/Product Backlog items. Items not completed during the time-boxed Sprint (as per the jointly defined Definition of Done and Acceptance Criteria) remain on the Product Backlog for scheduling in a future Sprint.

Once the Sprint begins, the Sprint Backlog cannot be changed without invoking the Change Control Process. The Product Owner can add new requirements such as changes to a User Story or changes/additions to Acceptance Criteria, to the Product Backlog, but not to the Product Backlog items scheduled for completion within the Sprint currently underway. If the new Product Backlog items cause the Product Backlog to exceed the total initial Product Backlog size, equivalent items can be deprioritized (moved off the Product Backlog) or a Change Order (Please see Change Control section) processed to incorporate additional build Sprints into the project.

Throughout a Sprint cycle, standup meetings will be scheduled with the implementation team to discuss what team members accomplished the previous day, plan to accomplish that day, and discuss any issues or roadblocks. At the end of Sprint, final meetings will occur as a review and retrospective to discuss the completed Sprint and determine what could be changed that might make the next Sprint more productive.

During Product Backlog refinement (or grooming), the Product Owner can change the Product Backlog (add, change, remove items) as long as the total effort (hours estimate or Story Points) does not exceed the initially planned Product Backlog size.

The following outlines each of these key build Sprint elements:

1. Sprint Planning Meeting – No longer than 4 hours, held at the start of each Sprint to discuss details for completing the tasks as part of the Sprint's Product Backlog. The following are the key objectives of this meeting:
 - The Product Owner communicates the scope of work for the Sprint, reviewing "ready" Product Backlog items to be done.
 - The team assesses the work and negotiates with the Product Owner on which PBIs can be completed in the Sprint.
 - The entire team prepares the Sprint Backlog by detailing the work (i.e., tasks) needed to finish the selected Product Backlog items. This includes:
 - Breakdown of the item into individual tasks,
 - Estimate of the time required to complete each task,
 - An allocation of the tasks within the development team.
2. Configuration, Development, and Unit Testing – the team configures and/or develops based on the tasks assigned in the Sprint Backlog.
3. Functional Testing – Client resources confirm the unit tested Product Backlog items conform to the acceptance criteria defined for the User Story. If an item passes functional testing, it is promoted to the Product Owner to indicate it is "done" and considered completed for the Sprint.
4. Scrum Meetings – each meeting during a Sprint, the team holds periodic scrum meetings.
 - All team members must come prepared.
 - The meetings should occur at the same time and place every day.
 - The meetings should be limited (i.e., timeboxed) to fifteen minutes.
 - Each team member answers the following questions:
 - What did I do yesterday that helped meet the Sprint goal?
 - What will I do today to help meet the Sprint goal?
 - Do I see any impediments that prevent me or the team from meeting the Sprint goal?
 - Any impediment (stumbling block, risk or issue) identified in the scrum meeting should be captured by the Gray Quarter Scrum Master/Project Manager and an agreed person designated to working toward a resolution (outside of the scrum meeting). No detailed discussions should happen during the scrum.
 - The scrum enables the Gray Quarter Scrum Master/Project Manager to track a Sprint burndown chart that measures the current estimate of outstanding work required to complete each task in the Sprint Backlog against the total available time remaining in the current Sprint. If there is a discrepancy, the development team and the Gray Quarter Scrum Master/Project Manager must propose a corrective action plan to the Product Owner.

5. Sprint Review– the team presents the completed work to the Product Owner during the Sprint review meeting held at the end of a Sprint. The meeting is recommended to be no more than two hours in duration. The following key objective should be met:
 - The team reviews the work that was completed in the Sprint duration. For items that have passed functional testing, the Product Owner assigns a completed status ("done").
 - The team also reviews planned work that was not completed. The Product Owner determines (outside of the Sprint review meeting) how to re-prioritize any incomplete work for future Sprints.
6. Sprint Retrospective Meeting – the Sprint retrospective meeting is also held at the end of the Sprint and is facilitated by the Gray Quarter Scrum Master/Project Manager. The purpose of this meeting is to foster continuous improvement within the team. This meeting should also be no more than two hours in duration. The following questions should be asked to the entire team:
 - What went well during the Sprint cycle?
 - What went wrong during the Sprint cycle?
 - What could we do differently to improve?

As part of the Release Planning and Product Backlog grooming, the Product Backlog will be logically sequenced to address dependencies between technical components (conversion, interfaces, and reports). For example, the team will complete the base configuration of the license types during initial Sprints (e.g., Sprints 1, 2 and 3). In subsequent Sprints, the team will build the next logical layers such as automations, conversions, interfaces, and reports. The following list provides key considerations.

- Solution Foundation – Early build Sprints will focus on configuring the base solution, or foundation. This base configuration solidifies the record types, data fields, and workflows for a given license process. It serves as the basis for automations, reports, and interfaces.
- Automations – Automations are built against the base configuration. In some cases, the automation tasks related to a User Story may be scheduled for a later Sprint to enable the base configuration to be finalized prior to writing automation code.
- Reports and Interfaces– Reports and interfaces are also built against the base configuration and are scheduled for Sprints after the foundation is done.

A given Sprint may include one or more of the following: configuration, business automation, report analysis, etc. The goal is to deliver increments of working product functionality within each Sprint. If a Product Backlog item/ User Story cannot be accomplished within a Sprint, the team must break it down to units of work achievable within a Sprint. In some cases, this may not be practical, for example an entire life cycle of an interface being built within the duration of a single Sprint. In these cases, the team will either break the work down into distinct increments or each Sprint may have pieces of the conversion and interface activities, such as Data Mapping occurring in an early Sprint, conversion development occurring in the next Sprint, and a test conversion run in a later Sprint.

Software Release to Production

Once the Product Backlog items targeted for a Release are complete, the Scrum Team will enter the Production Release Sprints to complete Release testing, and code promotion to Production. During this project stage, final Release testing (often referred to as "hardening") is the goal of testing activities. This effort is focused on confirming that the product increments delivered in each Sprint interoperate as designed and that no new regression errors were introduced. Release Sprints ready the results of the completed build Sprints, enabling the promotion of a new set of configurations into Production Release, encompassing the following activities:

- Code and configuration promoted to the final staging environment,
- Release hardening and regression tests,
- Code promotion to Production,
- Production Release and smoke test.

Release testing cycles are managed in Sprints similarly to how they are managed in a waterfall methodology. Once within the Release testing Sprint, the team will perform end-to-end hardening test for the new configurations and regression tests where applicable against previously released functionality. The Product Owner is responsible for prioritizing the team's work on go-live critical defects to complete the project stage within the allocated Sprint(s) (time box).

Conformance with the Release Definition of Done (which includes no Severity 1 or 2 defects open) constitutes the acceptance criteria for a Release. Defects are deviations from the Acceptance Criteria defined for the Product Backlog item. During the Release Sprint, Severity 1 or 2 defects will be prioritized. Out-of-scope issues will be closed or deferred to a future Release or Post-Production Support Backlog.

Post-Production Support

Following Production Go Live, Gray Quarter and Client will complete a Post-Production Stabilization Sprint (12 weeks) to address post- Production defects and transition the Release to the Client support team.

Assumptions

General Assumptions

- To meet the overall timelines of the project, the Client and Gray Quarter will adhere to the mutually agreed schedule and agree that time is of the essence. For schedule changes or elaboration during Sprint Planning, Gray Quarter and Client determine task deadlines to be documented in the project schedule and/or assigned during Sprint Planning for each Sprint. Unless otherwise defined, Gray Quarter expects a single review cycle (i.e., submit, review, cure,

accept) will be achievable for deliverables and PBI approvals. The second review will focus on defects and comments raised during the first review.

- Sprint Execution – The Client and Gray Quarter will be responsible for maintaining the quality of the Sprint execution. This includes but is not limited to the duration, scope, task completion, feedback, participation, and Product Backlog grooming required for Sprint readiness. Any impact by any party to the Sprint may require a Project Change Order (Please see Change Control section) to address the need for more resources (i.e., time) to complete the remaining Sprints and project activities. Once the Sprints have been set, any changes to the Sprint's scope could result in the need for a Project Change Order (Please see Change Control section) to account for the additional Sprints needed.
- Testing Execution – The Client will be responsible for the build-out and completion of the testing scripts used to validate system functionality against requirements in scope. Case identification and disposition (training, new requirement, or defect) must be agreed upon at the end of each day by the Client Product Owner and Gray Quarter Scrum Master/Project Manager. This will allow for the proper execution of priority work items for the team to resolve to successfully close out the Sprint.
- Travel is anticipated in the performance of this SOW. The Client will be billed for travel expenses.
- No sales tax or use table shall be included in or added to the prices of material on this order.
- The Client and Gray Quarter will review their responsibilities before work begins to ensure that the Services can be satisfactorily completed in the appropriate timeframe.
- Gray Quarter is not responsible for impacts to the timeline caused by a dependency on a third party that is solely caused by the Client.

Payment Terms

Gray Quarter will perform the Services on a Time-and-Material basis. The total price to perform the Services and provide the Deliverables described herein is **\$2,100,336** at \$168 per hour for a total of 12,502 hours exclusive of taxes and expenses (the "Time-and-Material").

The Time-and-Material price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW.

Invoices will be sent monthly based on hours worked.

The Period of Performance (PoP) is projected to be twenty four (24) months from project kickoff to go live.

Expenses

Travel is anticipated for this project and Gray Quarter has allocated up to \$40,000 for travel expenses. The City will approve any onsite from Gray Quarter prior to any finalizing of an onsite meeting. If additional travel is required beyond the travel budget, the client and Gray Quarter will mutually agree to the increased amount. The actual amounts of any reasonable and customary travel expenses incurred during the performance of the Services will be billed to Client. Gray Quarter will bill Client for actual expenses incurred for travel and lodging/living, as well as other approved out-of-pocket expenses (such as mileage, parking, tolls and telecommunications charges, etc.). City can reimburse per City's reimbursement policy. Expense receipts will be made available as requested by Client.

Appendix A: Statement of Work for the ePermitHub's Digital Plan Room

High Level Overview of the DPR implementation

The Digital Plan Room (DPR) implementation will follow the Release Plan referenced on page 19 of the SOW. The DPR implementation phase activities are outlined below but will follow the SOW's referenced 24 sprints and 4 iterative releases.

Implementation Phase Activities:

1. Project kick-off and initiation (Project startup phase listed within the SOW):
 - Establish a communication and project tracking plan.
 - Deliver the Project kick-off presentation and meeting.
2. Digital Plan Room Cloud Provisioning (Sprint 0: Foundation Phase listed within the SOW):
 - Verify that all Accela Civic Platform prerequisites are in place.
 - Cloud Provisioning of the Digital Plan Room components into Client's nonprod1 environment.
 - Cloud Provisioning of the Digital Plan Room database.
 - Discuss nonprod2 and PROD environments.
3. Digital Plan Room Configuration Analysis (Sprint 1 listed within the SOW):

- Define the configuration for each record type to be enabled in the plan room.
 - Gather all document types needed for upload and mapping to the plan room.
 - Gather Digital Signature validation requirements.
 - Gather review package checklist requirements.
 - Plan Accela workflow integration configuration points.
 - Design final approved documentation business logic.
 - Determine Accela user group to Digital Plan Room role mappings.
 - Determine Digital Plan Room disciplines to workflow task configuration.
 - Gather stamp and watermark requirements.
4. Digital Plan Room Configuration (Sprint 2-23 listed within the SOW):
- Configure Accela Civic Platform standard choices as defined during Configuration Analysis.
 - Configure Digital Plan Room business rules utilizing the DPR Accela SDK.
 - Implement custom EMSE scripting as determined during Configuration Analysis.
 - Develop stamps and watermarks as determined during Configuration Analysis.

Training, User Acceptance

1. User Acceptance Testing (UAT) will follow the SOW referenced on page 19.
2. Historical Plan Review Conversion:
 - Migration of documents from in-flight plan review and historically approved projects from legacy electronic plan review platform into the Digital Plan Room.
 - Migration of textual comments for historical plan reviews.
3. Administrative and technical training will follow table 6, referenced in the SOW.
4. Staff Training will follow table 6, referenced in the SOW.
5. Agency Client Enablement:
 - Produce contextually relevant public-facing training and help web-based videos for licensed professionals, contractors, owners, and the public submitting plans.
 - Produce public-facing User Guide for licensed professionals, contractors, owners, and the public submitting plans.
- Conduct web-based Agency Customer training sessions.

ePermitHub Digital Plan Room Project Plan Details

The following section(s) describes the specific activities and tasks that will be executed to meet the Client's business objectives and requirements. In support of the implementation effort described below and within the SOW, Gray Quarter will provide the below-detailed implementation services. For each deliverable, a description is further defined below.

Digital Plan Room Provisioning

During the cloud provisioning step, the Gray Quarter team will review the Digital Plan Room cloud provisioning requirements with the Client's technical team, including infrastructure and software prerequisites. Once the prerequisites are confirmed to be in place in the Client's SUPP environment, the Digital Plan Room software components will be provisioned by the Gray Quarter and verified to work properly. Documentation on the software setup architecture specific to the Client will be provided to the Client's technical team for reference.

Gray Quarter Responsibilities:

- Providing timely and appropriate responses to Client's requests for information.
- Consulting with Client resources to provide technical input and answer technical questions related to the requirements for the Digital Plan Room.
- Gray Quarter will provision up to two [2] sandbox environments.

Client Responsibilities:

- Providing timely and appropriate responses to Gray Quarter's requests for information.
- Providing Gray Quarter with Admin contact information to setup Client's Admin account.

Digital Plan Room Configuration Analysis

During the Foundation phase and Sprints comprises of the activities required to define the appropriate configuration of the Digital Plan Room and its integration points with the Accela Civic Platform, specifically to reflect the Client's plan review business processes. During this task, the Gray Quarter team, with input from the Client, will identify any details as it pertains to plan submittal, review, and approval and provide appropriate configuration specifications for the following items:

- Determine configuration for each Plan Review record type,
- Determine all needed document types,
- Determine document upload configuration,
- Determine Digital Signatures validation configuration,
- Determine Accela workflow integration configuration points,
- Determine final approved set cloning business logic,

- Determine Accela to Digital Plan Room user role mappings,
- Determine Digital Plan Room discipline configuration,
- Determine required Approval Stamps.

Gray Quarter Responsibilities:

- Providing timely and appropriate responses to Client's request for information.
- Interviewing staff to understand existing business processes.
- Conducting meetings via email, web conference, and phone to gather and validate analysis input.

Client Responsibilities:

- Providing timely and appropriate responses to Gray Quarter's requests for information.
- Making available the appropriate Client key users and content experts to provide the required information, participate in the configuration analysis, and verify the accuracy of the documented workflows, input/output formats, and data elements.
- Providing any existing business process documentation, including process flows; fee schedules; commonly used applications, reports, and forms; and other relevant information.
- Scheduling participants and meeting locations for analysis activities.

Digital Plan Room Configuration

Gray Quarter will configure the Digital Plan Room and make any modification to the Accela Civic Platform configuration by the requirements and determinations made and agreed upon between Gray Quarter and the Client.

The following high-level tasks will be performed:

- Configure Accela Civic Platform standard choices for the Digital Plan Room as defined in the previous Deliverable,
- Configure new Accela document types and associated business rules,
- Configure Digital Signature validation,
- Configure Digital Plan Room EMSE library and required scripts,
- Implement custom EMSE scripting as determined during Configuration Analysis,
- Design, create and configure Approval Stamps as determined during Configuration.

Documentation on the software configuration specific to the Client will be provided to the Client's administrative and technical team for reference.

Gray Quarter Responsibilities:

- Providing timely and appropriate responses to Client's request for information.

Client Responsibilities

- Providing timely and appropriate responses to Gray Quarter's requests for information.
- Making available the appropriate Client key users and content experts to participate in creating the system to learn about the system (knowledge transfer).
- Working with Gray Quarter to verify that the system meets the requirements captured in the foundation phase.

User Acceptance Testing (UAT)

During UAT, Gray Quarter will assist the Client in testing and validating the configuration and readiness to be migrated to production. The testing effort will require a significant time investment by the Client. The Gray Quarter will aid the Client through UAT support and address and rectify issues discovered during the UAT process.

Gray Quarter Responsibilities:

- Providing recommendations on testing strategy and best practices.

Client Responsibilities:

- Providing timely and appropriate responses to the Gray Quarter's request for information.
- Making available the appropriate Client key users and content experts to participate in UAT as defined and managed by Client.
- Utilizing the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.

Administrative and Technical Training

The Gray Quarter will provide training to Client staff focusing on the administrative and technical setup and the Digital Plan Room administration and configuration. The goal is to educate Client staff in all aspects of the Digital Plan Room solution and ensure the staff is self-sufficient before Go-Live.

The Gray Quarter will provide remote training sessions that span 4 hours. Client staff is responsible for selecting qualified users for the training, who are critical to project success. The following topics will be covered as part of the training session:

- Accela workflow integration,
- Plans and Documents upload,
- Digital Plan Room roles and mapping to Accela roles,
- Digital Plan Room Standard Choices,
- Digital Signatures validation,
- Approval Stamps creation and deployment.

The Gray Quarter will provide Client staff with appropriate documentation for the topics covered in the training session.

Gray Quarter Responsibilities:

- Coordinate with the Client to define training schedule and logistics.
- Deliver training per the specific requirements listed above and within the SOW.

Client Responsibilities:

- Select and prepare the power-users who participate in the training and subsequently training end-users.
- Arrange the time and qualified people for the training who are critical to the project's success.
- Provide suitable Client facilities to accommodate various training classes.
- Ensure that users are proficient in using PCs in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with the use of standard Internet browsers as a prerequisite for the course.
- Ensure that the users install prerequisite software prior to training.

End User Training

Gray Quarter will complete all the necessary training to run electronic plan review operations across applicable departments. Training materials and required training sessions will be created and conducted.

Gray Quarter will provide the following onsite or remote training sessions to the Client End Users (Users with non-administrative roles) referenced on page 19 of the SOW.

It is recommended that each training session be recorded for reference.

The course curriculum is as follows:

Intake Specialists/Permit Technician Curriculum

	Description
ePermitHub Digital Plan Room embedded into Accela Citizen Access	<ul style="list-style-type: none">• Plan submittal from the Client perspective.<ul style="list-style-type: none">○ Understanding the process, a Client will follow to submit an application and submit plans and supporting documents.○ Review the types of file validation & digital signature validation occurring during submittal and how to interpret any errors.○ Walkthrough file processing and reviewing the automated sheet numbering.
	<ul style="list-style-type: none">• Resubmittal process from the Client perspective<ul style="list-style-type: none">○ Reviewing & answering issues from a rejected plan set○ Completing the resubmittal of plan addressing the answered issues.
ePermitHub Digital Plan Room embedded into Accela Civic Platform Back Office	<ul style="list-style-type: none">• Plan submittal from a staff perspective when done in-house.• High-level review of Plan Reviewer activities<ul style="list-style-type: none">○ Learn at a high-level the steps a plan reviewer will perform and how they affect what the Client will see in Accela Citizen Access

Plan Reviewers/Managers Curriculum

	Description
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ePermitHub Digital Plan Room embedded into Accela Civic Platform Back Office	<ul style="list-style-type: none"> • Accela workflow and the digital plan room ○ Learn how the digital platform interacts with the Accela workflow
	<ul style="list-style-type: none"> • Completing a plan review <ul style="list-style-type: none"> ○ Navigating the digital plan room ○ Overview of the viewer and available tools ○ Creating issues & markup ○ Reviewing issues and filtering tools ○ Sheet versioning ○ Comparison tools ○ Stamping • Rejecting plans & requesting revisions • Resubmittals & approving plans. • Create print set
	<ul style="list-style-type: none"> • Overview of Intake Staff usage of the digital plan room ○ Plan submittal from a staff perspective when done in-house
ePermitHub Digital Plan Room embedded into Accela Citizen Access	<ul style="list-style-type: none"> • Overview of Client usage of digital plan room ○ Plan submittals and file validation & processing. ○ Reviewing and answering issues contextually from the plan markup

Gray Quarter Responsibilities:

- Coordinating with the Client to define training schedule and logistics.
- Providing End User Training as described above.
- Providing training material in a format easily modifiable by the Client.

Client Responsibilities:

- Selecting and preparing the power-users who will be participating in the training and subsequently training end-users.
- Arranging the time and qualified people for the training who are critical to the project's success.

- Providing suitable Client onsite facilities to accommodate various training classes.
- Providing printed training resources developed by Gray Quarter for Client staff.
- Ensuring that users are proficient in using PCs in a Windows environment as a prerequisite for the course.
- Ensuring that users are familiar with the use of standard Internet browsers as a prerequisite for the course.

Agency Customer Enablement

In this context, the “Agency” (i.e., city, county, state, etc.) is the Gray Quarter’s Client, and the “Agency Customer” is the Agency’s Customers, such as the licensed professionals, owners and general public leveraging the ePermitHub Digital Plan Room embedded in Accela Citizen Access to:

- Submit their initial electronic plans and supporting documents,
- Respond to Issues related to their plans created by Agency Plan Reviewers,
- Resubmit corrected plan sheets (aka, digital slip sheets),
- Access and print approved job copies of their plans.

During Agency Customer Enablement, Gray Quarter provides web-based training sessions, produces contextually relevant public-facing web-based training videos, and produces a User Guide for Agency’s Customers on how to use the ePermitHub Digital Plan Room embedded in Accela Civic Access. Client publishes videos and User Guide to a dedicated Digital Plan Room information page at Client’s website.

Gray Quarter Responsibilities:

- Provide three [3] web-based Agency Client training sessions of one [1] hours each covering the following topics:
 - Plan Submittal,
 - File Validation Overview,
 - Response to Agency Correction comments,
 - Plan Re-submittal.
- Produce the following five (5) public-facing videos:
 - Uploading Plans & Supporting Documents,
 - Finalizing & Submitting Review Packages,
 - Accessing Review Issues & Conditions,
 - Submitting Revised Plans,

- Downloading Approved Plans.
- Produce User Guide in editable format.

Client Responsibilities:

- Creating a dedicated public-facing information web page for related Digital Plan Room videos and User Guide,
- Adding Client branding at the beginning and end of each video.
- Adding Client branding to User Guide.
- Adding Digital Plan Room videos and User Guide to Client's Digital Plan Room information web page.
- Coordination of the external Client webinar scheduling, registration and launching of the training.

Project Assumptions

1. Gray Quarter assumes the Client will have the proper resources to implement the Digital Plan Room software.
2. Gray Quarter assumes all Professional Services costs and work have been identified in the SOW. Any additional cost or work required for this project will be identified and requested through a Change Request process.
3. Gray Quarter assumes the Client has identified a dedicated Accela user-account to be used for communication between the ePermitHub and Accela software.
4. Gray Quarter assumes the Client will provide the appropriate staff to be trained on the software during the training periods outlined in the Project timeline.
6. Gray Quarter assumes it will provide recommendations to the Client for plan review related record types regarding record and workflow statuses most appropriate for the Digital Plan Room software.
7. Gray Quarter assumes all standard choices required to integrate the software into the Client's Accela configuration and software will be configured by Gray Quarter.
8. Gray Quarter assumes the Client will collaborate with Gray Quarter on delivery of scripts required for the Digital Plan Room.
9. Gray Quarter assumes the Client's Accela Configuration Environment and Production Environments are in sync.
10. Gray Quarter assumes Client will verify that all Accela Civic Platform prerequisites are in place.

13. Training Execution parameters are as follows:

- a. At the beginning of the project, the Client selects and prepares the power-users who will be participating in the training and subsequently training end-users. Any switch in Client internal resources may require the need for a project change request to account for missing time.
- b. In the event of onsite training, Client provides suitable onsite facilities and equipment, such as access to network-connected training computers and monitors, to accommodate various training classes.
- d. In the event of offsite training, Client ensures all remote class attendees have access to suitable equipment, such as access to internet-connected training computers and monitors, to accommodate various training classes.
- e. Gray Quarter provides training resources in digital format developed by Gray Quarter for Client staff being trained.
- f. Ensure that users are proficient in using PCs in a Windows environment as a prerequisite for the course.
- g. Ensure that users are familiar with the use of standard Internet browsers as a prerequisite for the course.

14. Schedule and delivery are contingent on availability and access to Client staff.