

Accela Subscription Services Agreement.....	pg. 1
Exhibit A (reserved) .....	pg. 9
Exhibit B, Accela Availability and Security Policy.....	pg. 10
Exhibit C, Accela Consolidated SaaS Support Policies.....	pg. 12
Exhibit D, Accela Data Storage Policy .....	pg. 19
Exhibit E, Accela RFP Response .....	pg. 21
• RFP Appendix A – Land Management/Function Workbook Tabs .....	pg. 89
• RFP Appendix B Vendor Profile .....	pg. 171
• RFP Appendix C Vendor Financial Information.....	pg. 172
• RFP Appendix D Vendor Customer Base .....	pg. 173
• RFP Appendix E Vendor References .....	pg. 174
• RFP Appendix F Vendor General System.....	pg. 175
• RFP Appendix G1 On-Premise Project Costs .....	pg. 177
• RFP Appendix G2 Cloud/Hosted Project Costs .....	pg. 179
• RFP Appendix H Interface Costs .....	pg. 182
• RFP Appendix I Conversion Costs.....	pg. 184
• RFP Appendix J Modification Costs .....	pg. 185
Accela Order Form .....	pg. 186
Accela BAFO .....	Attachment, immediately after Accela Order Form)
Accela System Overview Follow-up Items	Attachment, immediately after Accela BAFO)

## ACCELA SUBSCRIPTION SERVICES AGREEMENT

This Accela Subscription Services Agreement (this “**Agreement**”) is entered into as of the date of the applicable Order, as defined below, that incorporates these terms (the “**Effective Date**”) by and between Accela, Inc. and the entity identified in such Order (“**Customer**”).

### 1. DEFINITIONS.

1.1 “**Accela System**” means the information technology infrastructure used by or on behalf of Accela in performing the Subscriptions Services, including all software (including but not limited to Accela Software), hardware, databases, electronic systems (including database management systems), and networks, whether operated directly by Accela or its third-party suppliers.

1.2 “**Aggregate Data**” means data and information related to Customer’s use of the Subscription Services, including anonymized analysis of all data processed in the Subscription Services, that is used by Accela in an aggregate and anonymized manner, including compiling statistical and performance information related to the provision and operation of the Services.

1.3 “**Authorized User**” means one named employee, contractor or agent of Customer (each identified by a unique email address) for whom Customer has purchased a subscription to the Subscription Services and who is authorized by Customer to access and use the Services under the rights granted to Customer pursuant to this Agreement.

1.4 “**Consulting Services**” means packaged or time and materials consulting, review, training or other services (but excluding Subscription and Support Services) delivered by Accela to Customer pursuant a separate Order and terms.

1.5 “**Customer Data**” means the content, materials, and data that Customer, Authorized Users, and External Users enter into the Subscription Services. Customer Data does not include any component of the Subscription Services, material provided by or on behalf of Accela, or Aggregate Data.

1.6 “**Documentation**” means the then-current technical and functional user documentation in any form made generally available by Accela for the Subscription Services.

1.7 “**External Users**” means third party users of the Subscription Services that access the public-facing interfaces of the Subscription Services to submit queries and requests to facilitate communications between such third party and Customer.

1.8 “**Intellectual Property Rights**” means any patent rights (including, without limitation, patent applications and disclosures), copyrights, trade secrets, know-how, and any other intellectual property rights, in all cases whether or not registered or registrable and recognized in any country or jurisdiction in the world.

1.9 “**Order**” means an Accela order form or other mutually acceptable document fully executed between Customer and Accela that incorporates this Agreement.

1.10 “**Service Availability Policy**” means the Service Availability and Security Policy located at Exhibit B.

1.11 “**Subscription Services**” means the civic administration services, comprised of the Accela System, Software, and Support Services, to which Customer may license access to in accordance with the terms herein.

1.12 “**Software**” means any licensed software (including client software for Authorized Users’ devices) and Documentation that Accela uses or makes available as part of the Subscription Services.

1.13 “**Support Services**” means those technical and help services provided by Accela in accordance with the Software Support Services Policies (SaaS) located at Exhibit C.01023

1.14 “**Subscription Period**” means the duration of Customer’s authorized use of the Subscription Services as designated in the Order.

## **2. USAGE AND ACCESS RIGHTS.**

2.1 Right to Access. Subject to the terms and conditions of this Agreement, Accela hereby grants to Customer a limited, non-exclusive, non-transferable right and license during the Subscription Period, to permit: (i) Authorized Users to access and use the internal and administrative interfaces of the Subscription Services in accordance with the Documentation to support Customer’s internal business purposes and (ii) its External Users the ability to access and use the publicly available interfaces to submit requests and information to Customer. Each instance of the Subscription Service shall be provisioned with the amount of storage set forth in the Order and additional storage may be purchased at the then-current rates.

2.2 Support Services & Service Availability. During the Subscription Period, Accela shall provide to Customer the Support Services specified in the Order and shall make all commercially reasonable efforts to attain the service levels specified in the applicable policies. The remedies set forth in the Support Services and Service Availability Policy are the sole and exclusive remedies for any breach of the service levels. Customer grants Accela a royalty-free, worldwide, transferable, sub- licensable, irrevocable, perpetual license to use or incorporate into its software or services any suggestions or other feedback provided by Customer or Authorized Users relating to the operation or features of the Subscription Services.

### 2.3 Reserved.

2.4 Restrictions on Use. Customer shall not, and shall not permit others to: (i) use or access the Subscription Services in any manner except as expressly permitted by the Agreement, including but not limited to, in a manner that circumvents contractual usage restrictions set forth in this Agreement; (ii) license, sub-license, sell, re-sell, rent, lease, transfer, distribute, time share or otherwise make any portion of the Subscription Services available for access by third parties except as otherwise expressly provided herein; (iii) use the Subscription Service in a way that: (a) violates or infringes upon the rights of a third party; or (b) stores or transmits libelous, tortious, or otherwise unlawful material or malicious code or viruses; (iv) create derivative works, reverse engineer, decompile, disassemble, copy, or otherwise attempt to derive source code or other trade secrets from or about any of the Subscription Services (except to and only to the extent such rights are proscribed by law); (v) interfere with or disrupt the security, integrity, operation, or performance of the Subscription Services; (vi) access, use, or provide access or use to the Subscription Services or Documentation for the purposes of competitive analysis or the development, provision, or use of a competing software, SaaS or product or any other purpose that is to Accela’s detriment or commercial disadvantage; (vii) provide access to the Subscription Services to competitors of Accela; (viii) access or use components of the Subscription Service not licensed by Customer; (ix) use or allow the use of the Subscription Services by anyone located in, under the control of, or that is a national or resident of a U.S. embargoed country or territory or by a prohibited end user under Export Control Laws (as defined in Section 12.3, Compliance with Laws); (x) remove, delete, alter or obscure any trademarks, Documentation, warranties, or disclaimers, or any copyright, trademark, patent or other intellectual property or proprietary rights notices from any Subscription Services; or (xi) access or use the Subscription Services in, or in association with, the design, construction, maintenance, or operation of any hazardous environments, systems or applications, any safety response systems or other safety-critical applications, or any other use or application in which the use or failure of the Subscription Services could lead to personal injury or severe physical or property damage.

2.5 Ownership. Accela retains all Intellectual Property Rights, including all rights, title and license to the Subscription Service, Software, Accela System, Support Services, Consulting Services, and Aggregate Data, any related work product of the foregoing and all derivative works thereof by whomever produced; provided however, that to the extent such materials are delivered to Customer as part of the Subscription Services, Consulting

Services or Support Services then Customer shall receive a limited license consistent with the terms of Section 2 to use such materials during the Subscription Period.

**2.6 Customer's Responsibilities.** Customer will: (i) be responsible for meeting Accela's applicable minimum system requirements for use of the Subscription Services set forth in the Documentation; (ii) be responsible for Authorized Users' compliance with this Agreement and for any other activity (whether or not authorized by Customer) occurring under Customer's account; (iii) be solely responsible for the accuracy, quality, integrity and legality of Customer Data; (iv) use commercially reasonable efforts to prevent unauthorized access to or use of the Subscription Services and Customer Data under its account, and notify Accela promptly of any such unauthorized access or use, and; (v) use the Subscription Services only in accordance with the applicable Documentation, laws and government regulations.

### **3. PAYMENT TERMS.**

**3.1 Purchases Directly from Accela.** Except as otherwise set forth in an Order, Subscription fees shall be invoiced annually in advance and such fees shall be due and payable on the first day of the Subscription and on each anniversary thereafter for each renewal, if any. All other invoices shall be due and payable net sixty (60) from the date of the applicable invoice. All amounts payable to Accela under this Agreement shall be paid by Customer in full without any setoff, deduction, debit, or withholding for any reason. All Subscription Services fees are exclusive of any taxes, levies, duties, withholding or similar governmental assessments of any nature (collectively, "**Taxes**"). If any such Taxes are owed or payable for such transactions, they shall be paid separately by Customer without set-off to the fees due Accela.

**3.2 Purchases from Authorized Resellers.** In the event that Customer has purchased any products or services through a reseller, subject to these terms, any separate payment arrangements and terms shall be exclusively through such reseller and Accela is not a party to such transactions. Accela's sole obligations are set forth herein and Customer acknowledges that its rights hereunder may be terminated for non-payment to such third party.

**4. CONFIDENTIALITY.** As used herein, "**Confidential Information**" means all confidential information disclosed by a one party to this Agreement to the other party of this Agreement whether orally or in writing, that is designated as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of disclosure. However, Confidential Information will not include any information that: (i) is or becomes generally known to the public without breach of any obligation owed to the disclosing party; (ii) was known to the receiving party prior to its disclosure without breach of any obligation owed to the disclosing party; (iii) is received without restriction from a third party without breach of any obligation owed to the disclosing party; or (iv) was independently developed by the receiving party. Each party will use the same degree of care that it uses to protect the confidentiality of its own confidential information of like kind (but in no event less than reasonable care) not to disclose or use any Confidential Information except as permitted herein, and will limit access to Confidential Information to those of its employees, contractors and agents who need such access for purposes consistent with this Agreement and who are bound to protect such Confidential Information consistent with this Agreement. The receiving party may disclose Confidential Information if it is compelled by law to do so, provided the receiving party gives the disclosing party prior notice of such compelled disclosure (to the extent legally permitted) and reasonable assistance, at the disclosing party's request and cost, to contest, limit, or protect the disclosure.

### **5. CUSTOMER DATA.**

**5.1 Ownership.** Customer reserves all its rights, title, and interest in and to the Customer Data. No rights are granted to Accela hereunder with respect to the Customer Data, except as otherwise set forth explicitly in Section 5.

**5.2 Usage.** Customer shall be responsible for Customer Data as entered in to, applied or used in the Subscription Services. Customer acknowledges that Accela generally does not have access to and cannot retrieve lost Customer Data. Customer grants to Accela the non-exclusive right to process Customer Data (including personal data) for the sole purpose of and only to the extent necessary for Accela: (i) to provide the Subscription Services; (ii) to verify Customer's compliance with the restrictions set forth in Section 2.4 (Restrictions on Use) if Accela has a reasonable

belief of Customer's non-compliance; and (iii) as otherwise set forth in this Agreement. Accela may utilize the information concerning Customer's use of the Subscription Services (excluding any use of Customer's Confidential Information) to improve Subscription Services, to provide Customer with reports on its use of the Subscription Services, and to compile aggregate statistics and usage patterns by customers using the Subscription Services.

5.3 Use of Aggregate Data. Customer agrees that Accela may collect, use and disclose Aggregate Data derived from the use of the Subscription Services for industry analysis, benchmarking, analytics, marketing and other business purposes. All Aggregate Data collected, used and disclosed will be in aggregate form only and will not identify Customer, its Authorized Users or any third parties utilizing the Subscription Services.

## **6. WARRANTIES AND DISCLAIMERS.**

6.1 Subscription Services Warranty. During the Subscription Period, Accela warrants that Subscription Services shall perform materially in accordance with the applicable Documentation. As Customer's sole and exclusive remedy and Accela's entire liability for any breach of the foregoing warranty, Accela will use commercially reasonable efforts to: (a) repair the Subscription Services in question; (b) replace the Subscription Services in question with those of substantially similar functionality; or (c), after making all commercially reasonable attempts to do the foregoing, terminate the applicable Subscription Services and refund all unused, prepaid fees paid by Customer for such non-compliant Subscription Services.

### **6.2 Reserved.**

6.3. Disclaimers. EXCEPT AS EXPRESSLY PROVIDED HEREIN, ACCELA MAKES NO WARRANTY OF ANY KIND, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AND SPECIFICALLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, SECURITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

6.4. Cannabis-Related Activities. If Customer purchases any Subscription Services for use with any cannabis-related activities, the following additional disclaimers shall apply: Accela is considered a software service provider to its customers and not a cannabis related business or agent thereof. In addition to the foregoing, Accela only retains Subscription Services fees of this Agreement from its Customer for general software services, a state or local government agency, and does not retain these fees from any type of External Users. It is the sole responsibility of the Customer to offer state law compliant services, which may be coordinated and facilitated through the use of the Subscription Services. Accela makes no representations, promises, or warranties with respect to the legality, suitability, or otherwise regarding any third-party provider, including partners, and have no responsibility or liability with respect to services provided to Customer by such third parties.

7. **INDEMNIFICATION.** Each party will defend (or, at the indemnifying party's option, settle) any third party claim, suit or action brought against the other party to the extent that it is based upon a claim arising out of the performance of the indemnifying party's obligations under this Agreement or the gross negligence of willful misconduct of the indemnifying party, and will pay any costs, damages and reasonable attorneys' fees attributable to such claim that are finally awarded against the indemnified party, provided that the indemnified party provides: (a) the indemnifying party notice of such claim as soon practical and in no event later than would reasonably permit the indemnifying party to respond to such claim, (b) reasonable cooperation to the indemnifying party, at the indemnifying party's expense, in the defense and/or settlement of such claim and (c) the indemnifying party the sole and exclusive control of the defense, litigation and settlement of such claim. For a claim that the Subscription Services, as furnished by Accela hereunder, infringes or misappropriates the Intellectual Property Rights of any third party, in the event that Accela reasonably believes, in its sole discretion, that such claim

may prevail or that the usage of the Subscription Services may be joined, Accela may seek to: (a) modify the Subscription Services such that it will be non-infringing (provided such modification does not materially reduce the functionality or performance of Customer's installed instance); (b) replace the Subscription Services with a service that is non-infringing and provides substantially similar functionality and performance; or, if the first two options are not commercially practicable, (c) terminate the remainder of the Subscription Period and refund any, pre-paid, unused fees received by Accela. Accela will have no liability under this Section 7 to the extent any claims arise from (i) any combination of the Subscription Services with products, services, methods of a third party; (ii) a modification of the Subscription Services that were either implemented by anyone other than Accela or implemented by Accela in accordance with Customer specifications; (iii) any use of the Subscription Services in a manner that violates this Agreement or the instructions given to Customer by Accela; (iv) a version of the Subscription Services other than the current, fully patched version, provided such updated version would have avoided the infringement; or (v) Customer's breach of this Agreement. THIS SECTION 7 STATES THE ENTIRE OBLIGATION OF ACCELA AND ITS LICENSORS WITH RESPECT TO ANY ALLEGED OR ACTUAL INFRINGEMENT OR MISAPPROPRIATION OF INTELLECTUAL PROPERTY RIGHTS RELATED TO THIS AGREEMENT.

**8. LIMITATION OF LIABILITY.** EXCEPT FOR LIABILITY ARISING OUT OF EITHER PARTY'S LIABILITY FOR DEATH OR PERSONAL INJURY, BREACH OF CONFIDENTIALITY, REFUSAL OF SERVICES, WILLFUL MISCONDUCT, DAMAGE TO PHYSICAL PROPERTY, VIOLATIONS OF APPLICABLE LAWS OR GROSS NEGLIGENCE, NEITHER PARTY'S AGGREGATE LIABILITY FOR DAMAGES ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT OR FROM THE USE OF OR INABILITY TO USE THE SERVICE, WHETHER IN CONTRACT, TORT OR UNDER ANY OTHER THEORY OF LIABILITY, SHALL EXCEED THE TOTAL AMOUNT PAID BY CUSTOMER HEREUNDER IN THE TWENTY FOUR (24) MONTH PERIOD IMMEDIATELY PRECEDING THE INCIDENT. EXCEPT FOR LIABILITY ARISING OUT OF EITHER PARTY'S LIABILITY FOR DEATH OR PERSONAL INJURY, BREACH OF CONFIDENTIALITY, REFUSAL OF SERVICES, WILLFUL MISCONDUCT, DAMAGE TO PHYSICAL PROPERTY, VIOLATIONS OF APPLICABLE LAWS OR GROSS NEGLIGENCE, IN NO EVENT SHALL EITHER PARTY OR ANY OTHER PERSON OR ENTITY INVOLVED IN CREATING, PRODUCING OR DELIVERING THE SERVICE BE LIABLE FOR ANY INCIDENTAL, SPECIAL, EXEMPLARY OR CONSEQUENTIAL DAMAGES, INCLUDING LOST PROFITS, LOSS OF DATA OR LOSS OF GOODWILL, SERVICE INTERRUPTION, COMPUTER DAMAGE OR SYSTEM FAILURE OR THE COST OF SUBSTITUTE PRODUCTS OR SERVICES, ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT OR FROM THE USE OF OR INABILITY TO USE THE SUBSCRIPTION SERVICES, WHETHER BASED ON WARRANTY, CONTRACT, TORT (INCLUDING NEGLIGENCE), PRODUCT LIABILITY OR ANY OTHER LEGAL THEORY. THE FOREGOING EXCLUSIONS APPLY WHETHER OR NOT A PARTY HAS BEEN INFORMED OF THE POSSIBILITY OF SUCH DAMAGE, AND EVEN IF A LIMITED REMEDY SET FORTH HEREIN IS FOUND TO HAVE FAILED OF ITS ESSENTIAL PURPOSE.

**9. SECURITY.** Accela has implemented commercially viable and reasonable information security processes, policies and technology safeguards to protect the confidentiality and integrity of Customer Data, personal data protect against reasonably anticipated threats. Customer acknowledges that, notwithstanding security features of the Subscription Services, no product, hardware, software or service can provide a completely secure mechanism of electronic transmission or communication and that there are persons and entities, including enterprises, governments and quasi- governmental actors, as well as technologies, that may attempt to breach any electronic security measure. Subject only to its limited warranty obligations set forth in Section 6, Accela will have no liability for any such security breach. Customer further acknowledges that the Subscription Services is not guaranteed to operate without interruptions, failures, or errors. If Customer or Authorized Users use the Subscription Services in any application or environment where failure could cause personal injury, loss of life, or other substantial harm, Customer assumes any associated risks and will indemnify Accela and hold it harmless against those risks.

**10. THIRD PARTY SERVICES.** Customer may choose to obtain a product or service from a third party that is not directly produced by Accela as a component of the Subscription Services ("**Third Party Services**") and this may include third party products resold by Accela. Accela assumes no responsibility for, and specifically disclaims any liability, warranty or obligation with respect to, any Third Party Service or the performance of the Subscription Services (including Accela's service level commitment) when the Subscription Services are used in combination with or integrated with Third Party Services.

## **11. TERM AND TERMINATION.**

**11.1 Agreement Term.** This Agreement shall become effective on the Effective Date and shall continue in full force and effect until the expiration of any Subscription Periods set forth in an applicable Order governed by the Agreement.

**11.2 Subscription Periods & Renewals.** Subscription Periods begin as specified in the applicable Order and, unless terminated earlier in accordance with this Agreement, continue for the term specified therein. Except as

otherwise specified in the applicable Order, (a) all Subscription Services will automatically renew for additional Subscription Periods equal to the expiring Subscription Period, unless either party gives the other at thirty (30) days' notice of non-renewal before the end of the relevant Subscription Period and (b), Orders may only be cancelled or terminated early in accordance with Section 11.3. Subscription Services renewals may be subject to an annual increase, for which Accela shall provide Customer notice prior to the renewal of the Subscription Period. In the event of any non-renewal or other termination, Customer's right to use the Subscription Services will terminate at the end of the relevant Subscription Period.

**11.3 Termination or Suspension for Cause.** A party may terminate this Agreement and Subscription Services license granted hereunder for cause upon thirty (30) days' written notice to the other party of a material breach if such breach remains uncured at the expiration of such thirty (30) day period. Either party may terminate immediately if the other party files for bankruptcy or becomes insolvent. Accela may, at its sole option, suspend Customer's or any Authorized User's access to the Subscription Services, or any portion thereof, immediately if Accela: (i) suspects that any person other than Customer or an Authorized User is using or attempting to use Customer Data; (ii) suspects that Customer or an Authorized User is using the Subscription Services in a way that violates this Agreement and could expose Accela or any other entity to harm or legal liability; (iii) is or reasonably believes it is required to do so by law or court order or; (iv) Customer's payment obligations are more than one hundred and twenty (120) days past due, provided that Accela has provided at least thirty (30) days' notice of such suspension for delinquent payment. Should Customer terminate this Agreement for cause, Accela will refund a pro-rata portion of unused, pre-paid fees.

**11.4 Effect of Termination.** If this Agreement expires or is terminated for any reason: (i) within thirty (30) calendar days following the end of Customer's final Subscription Period, upon Customer's request Accela provided Customer Data and associated documents in a database dump file; provided that Customer pays (a) all costs of and associated with such copying, as calculated at Accela's then-current time-and-materials rates, and (b) any and all unpaid amounts due to Accela; (ii) licenses and use rights granted to Customer with respect to Subscription Services and intellectual property will immediately terminate; and (iii) Accela's obligation to provide any further services to Customer under this Agreement will immediately terminate, except as mutually agreed between the parties. If the Subscription Services are nearing expiration date or are otherwise terminated, Accela will initiate its data retention processes, including the deletion of Customer Data from systems directly controlled by Accela. Accela's current Data Storage Policy at Exhibit D.

**11.5 Survival.** Sections 2.5 (Ownership and Proprietary Rights), 4 (Confidentiality), 6.3 (Disclaimer), 8 (Limitation of Liability), 11.4 (Effect of Termination), 11.5 (Surviving Provisions), and 12 (General Provisions) will survive any termination or expiration of this Agreement.

## **12. GENERAL.**

**12.1 Notice.** Except as otherwise specified in this Agreement, all notices, permissions and approvals hereunder will be in writing and will be deemed to have been given upon: (i) personal delivery; (ii) three days after sending registered, return receipt requested, post or; (iii) one day after sending by commercial overnight carrier. Notices will be sent to the address specified by the recipient in writing when entering into this Agreement or establishing Customer's account for the Subscription Services.

**12.2 Governing Law and Jurisdiction.** This Agreement and any action related thereto will be governed by the laws of the State of California without regard to its conflict of laws provisions. The exclusive jurisdiction and venue of any action related to the subject matter of this Agreement will be the state and federal courts located in the County of San Bernardino, California and each of the parties hereto waives any objection to jurisdiction and venue in such courts.

**12.3 Compliance with Laws.** Each party will comply with all applicable laws and regulations with respect to its activities under this Agreement including, but not limited to, export laws and regulations of the United States and other applicable jurisdictions. Further, in connection with the services performed under this Agreement and Customer's use of the Subscription Services, the parties agree to comply with all applicable anti-corruption and anti-bribery laws, statutes and regulations.

**12.4 Assignment.** Neither party may assign or transfer this Agreement, whether by operation of law or otherwise, without the prior written consent of the other party. Any attempted assignment or transfer, without such consent, will be null and void. Subject to the foregoing, this Agreement will bind and inure to the benefit of the parties, their respective successors and permitted assigns.

**12.5 Publicity.** Notwithstanding anything to the contrary, each party will have the right to publicly announce the existence of the business relationship between parties without disclosing the specific terms of the Agreement.

12.6 Miscellaneous. No failure or delay by either party in exercising any right under this Agreement will constitute a waiver of that right. Other than as expressly stated herein, the remedies provided herein are in addition to, and not exclusive of, any other remedies of a party at law or in equity. If any provision of this Agreement is held by a court of competent jurisdiction to be contrary to law, the provision will be modified by the court and interpreted so as best to accomplish the objectives of the original provision to the fullest extent permitted by law, and the remaining provisions of this Agreement will remain in effect. Neither party will be liable for any delay or failure to perform under this Agreement to the extent such delay or failure results from circumstances or causes beyond its reasonable control. This Agreement does not create a partnership, franchise, joint venture, agency, fiduciary or similar relationship between the parties. This Agreement, including any attachments hereto as mutually agreed upon by the parties, constitute the entire agreement between the parties concerning its subject matter and it supersedes all prior communications, agreements, proposals or representations, written or oral, concerning its subject matter. No modification, amendment, or waiver of any provision of this Agreement will be effective unless in writing and signed by a duly authorized representative of each party against whom the modification, amendment or waiver is to be asserted. Notwithstanding any language to the contrary, no additional or conflicting terms or conditions stated in any of Customer's purchase order documentation or otherwise will be incorporated into or form any part of this Agreement, and all such terms or conditions shall be null and void.

12.7 Notwithstanding anything to the contrary, the parties acknowledge and agree that Exhibit E, Accela's RFP response, is attached for informational purposes only, including the Accela System Overview Follow-Up items, and has no legal effect. Only the items detailed in the SOW, with their capabilities, will be subject to being a deliverable under this Agreement. The attached BAFO and Order Form are final and supersedes any previous pricing.

In WITNESS WHERE OF, the parties have indicated their acceptance of the terms of this Agreement by their signatures below

**ACCELA, INC.**

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Signed by:  
  
73668EE5EB274C8...  
Michael E Gigliello  
Controller  
10/24/2024

**CUSTOMER: City of San Bernadino**

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_



## **Accela Availability and Security Policy**

### **Service Availability:**

Accela will use commercially reasonable efforts to (a) provide bandwidth sufficient for Customer's use of the Subscription Services provided hereunder and in an applicable Order Form and (b) operate and manage the Subscription Services with a ninety-nine and nine percent (99.9%) uptime goal (the "Availability SLA"), excluding situations identified as "Excluded" below.

"Excluded" means any outage that results from any of the following:

- a. Any maintenance performed by Accela during Accela's standard maintenance windows. Accela will notify Customer within forty-eight (48) hours of any standard maintenance and within twenty-four (24) hours for other non-standard emergency maintenance (collectively referred to herein as "Scheduled Maintenance"). Scheduled maintenance includes off-business hours (agency time) deployments of major releases & service packs. Major releases are deployed into an agency's non-production environments well in advance, typically 4 weeks ahead of production, to allow for adequate user acceptance testing.
- b. Customer's information content or application programming, or the acts or omissions of Customer or its agents, including, without limitation, the following:
  1. Any misconfiguration by Customer (as determined in Accela's sole discretion), including, without limitation, configuration errors and bad or unintended usage of the Subscription Services.
  2. Force majeure or other circumstances beyond Accela's reasonable control that could not be avoided by its exercise of due care.
- c. Failures of the carrier networks itself and the network by which Customer connects to the carrier networks any other network unavailability.
- d. Any window of time when Customer agrees that Subscription Services availability/unavailability will not be monitored or counted.
- e. Interruptions or delays in providing the Subscription Services resulting from telecommunication or Internet service provider failures.
- f. Customer's or any third party's use of the Subscription Services in an unauthorized or unlawful manner.

### **Remedies for Excessive Downtime:**

In the event the Availability of the Subscription Services falls below the Availability SLA in a given calendar month, Accela will pay Customer a service credit ("Service Credit") equal to the percentage of the fees set forth in the table below corresponding to the actual Availability of the Subscription Services during the applicable calendar month. Such Service Credit will be issued as a credit against any fees owed by Customer for the next calendar month of the Subscription Period or, if Customer does not owe any additional fees, then Accela will pay Customer the amount of the applicable Service Credit within thirty (30) days after the end of the calendar month in which such credit accrued. Such Service Credit will be in addition to any other remedies available to Customer at law, in equity or under this Agreement.

System availability is measured by the following formula:  $x = (n - y) * 100 / n$

Notes:

- (1) "x" is the uptime percentage; "n" is the total number of hours in the given calendar month minus scheduled downtime; and "y" is the total number of downtime hours in the given calendar month.
- (2) Specifically excluded from "n" and "y" in this calculation are the exception times on scheduled upgrade and maintenance windows.

Service	Availability	Percentage of Monthly Service Credited Fees
>99.9%		0%
95.0% -	< 99.9%	5% (max of \$280)
90.0% -	< 95.0%	10% (max of \$560)
80.0% -	< 90.0%	20% (max \$840)
70.0% -	< 80.0%	30% (max of \$1,120)
60.0% -	< 70.0%	40% (max of \$1,400)
<	< 60%	50% (max of \$2,800)

#### Customer Account Login:

For Accela user interface access, Accela uses TLS 1.2 with AES 256 bit or similar encryption for protection of data in transit, which is supported by most modern browsers. Accela will also restrict applicable administrative user interface access to Customer corporate networks for additional security on written request by Customer.

#### Accela SaaS Service Delivery:

Accela manages its apps and infrastructures within the industry-leading Microsoft Azure hosting environment, specifically designed and constructed to deliver world- class physical security, power availability, infrastructure flexibility and growth capacity. Accela's audit and compliance foundation includes SSAE 18 SOC 2 Type II, HIPAA, California Consumer Privacy Act (CCPA), and PCI-DSS (payment adapters). Accela's partnership with Microsoft delivers multi-layered security in physical datacenters, infrastructure and operations, with adherence to its numerous security certifications. More information can be found at <https://azure.microsoft.com/en-us/overview/security/>.

Exhibit C

Software Support Services Policies

**Accela, Inc.**

**Consolidated SaaS Support Policies**

**This document contains the Standard Support SaaS Services Policy . In the event you are unsure or wish to upgrade your Support Services Level, please contact your account manager.**

**Policy 1**

**Accela, Inc.**

**Standard SaaS Support Services Policy**

**Dated: April 21, 2021**

This Accela Standard SaaS Support Services Policy ("Support Policy") governs the terms under which Accela provides Support Services and is subject to the SaaS services agreement ("Agreement") entered into between Accela and the recipient of such services ("Customer"). This Support Policy may be updated from time to time by Accela in its sole discretion.

**General Requirements and Hours of Operation**

- a. Ticketing Support:** Accela will provide access to a ticketing system, which will be available twenty-four (24) hours per day, seven (7) days per week. A qualified support specialist shall use commercially reasonable efforts to answer questions and resolve problems regarding the Subscription Service from 4:00 A.M. until 6:00 P.M. Pacific Standard Time Monday through Friday, excluding Accela's observed holidays.
  - b. Telephone Support:** Accela's Customer Support Department, a live technical support facility, will be available to Customer from 4:00 A.M. until 6:00 P.M. Pacific Standard Time Monday through Friday, excluding Accela's observed holidays.
  - c. Online Support Material:** Available twenty-four (24) hours, seven (7) days a week, Accela will make available to Customer certain archived software updates and other technical information in Accela's online support databases.
- (1) Agency Contacts:** "Agency Contacts" are the individuals who will be the primary users of the Support Plan. You may designate up to two (2) Agency Contacts and agree to let Accela know if they change.

Your Agency Contacts will be responsible for:

Overseeing your Agency's support case activity, developing and deploying troubleshooting processes within your Agency's organization.

Agency will ensure Agency Contacts:

Have completed the Administrator Training offered as part of Accela's implementation and adoption programs. Are knowledgeable about the Agency's configured solution in order to assist Accela in analyzing and resolving technical issues. Have a basic understanding of any problem that is the subject of a case, and the ability to reproduce the problem in order to assist Accela in diagnosing and triaging the problem.

## **(2) Submitting a Case**

Agency Contacts may submit cases via: the online support portal by logging into the Accela Success Community at <https://success.accela.com> and selecting Get Support > Submit a case or

- a. a telephone call to Customer Support as described below (*For Severity Level 1 and Severity Level 2 issues, Agency must call Customer Support*)

## **(3) Updates**

Updates may address security fixes, critical patches, general maintenance functionality, and documentation and shall be made available at Accela's discretion. Accela is under no obligation to develop any future functionality or enhancements unless otherwise specified in the Agreement. If an update for the Service is made available to Customer pursuant to this Support Policy, it will automatically replace the previous version of the applicable Service.

Where practical, Accela will schedule Updates during non-business hours and will provide

Customers with advance notice of all Updates.

## **(4) Upgrade/Downgrade of Severity Level**

If, during the Support Request process, the issue either warrants assignment of a higher severity level than currently assigned or no longer warrants the severity level currently assigned based on its current impact on the production operation of the SaaS offering, then the severity level will be upgraded or downgraded accordingly to the severity level that most appropriately reflects its current impact.

## **(5) Customer Cooperation**

Accela must be able to reproduce errors in order to resolve them. Agency agrees to cooperate and work closely with Accela to reproduce errors, including, without limitation, conducting diagnostic or troubleshooting activities, implementation of fixes or updates previously provided by Accela, or providing information as reasonably requested and appropriate. Also, Accela may access Agency Contacts account and/or an admin account and/or Agency's personnel may be asked to provide remote access to their internal system for, without limitation, conducting diagnostic or troubleshooting activities, or implementation of fixes or updates previously provided by Accela.

## **(6) Third Party Product Support**

If any third-party software is supplied by Accela, Accela disclaims all support obligations for Such third-party software, unless expressly specified by Accela in Customer's Agreement.

## **(7) Exclusions**

The following Support Exclusions are not covered by this Support Policy:

- a. Support required due to Customer's or any End User's or third party's misuse of the Services;

- b. Support during times outside of Accela's regular business hours stated above;
- c. Support necessitated by external factors outside of Accela's reasonable control, including any force majeure event or Internet access or related problems beyond the Service demarcation point;
- d. Support of or caused by customizations (if outside of Accela's best practice recommendations), configuration changes, scripting, or data loss caused by or on behalf of Customer or any End User;
- e. Support of or caused by Customer's or any End User's or third party's equipment, software or other technology (other than third party equipment within Accela's direct control);
- f. Support to resolve or work-around conditions which cannot be reproduced in Accela's support environment and
- g. Support of any software add-ons supplied together with the Service (except where specified in the customer's Agreement).

Any support services falling within these Support Exclusions may be provided by Accela at its discretion and, if so provided, may be subject to additional pricing and support terms as specified by Accela.

#### **(8) Error Classification**

**Functional Definitions:** For the purposes of error classification, essential or major functions include: data capture features, SLA and alarming features, performance management features and application performance problem resolution features.

Severity	Definition
<b>Level 1</b>	Supported Product is non-functional or seriously affected and there is no reasonable workaround available (e.g. business is halted).
<b>Level 2</b>	Supported Product is affected and there is no workaround available or the workaround is impractical (e.g. Supported Product response is very slow, day to day operations continue but are impacted by the work around).
<b>Level 3</b>	Supported Product is non-functional however a convenient workaround exists (e.g. non-critical feature is unavailable or requires additional user intervention).
<b>Level 4</b>	Supported Product works, but there is a minor problem (e.g. incorrect label, or cosmetic defect).

#### **(9) Target Initial Response Time**

Accela will use commercially reasonable efforts to respond to each case within the applicable response time described in the table below:

Target Initial Response Time by Case Severity	
Severity Level	Target Initial Response Time

1	1 day <sup>a</sup>
2	3 days <sup>a</sup>
3	5 days <sup>a</sup>
4	7 days <sup>a</sup>

<sup>a</sup> Initial response times are including M-F, 4 am to 6 pm PT, excluding weekends and holidays. Severity Level 1 and 2 cases must be submitted via telephone as described above. Severity Level 1 and 2 target initial response times do not apply to cases submitted via email or electronically via the Accela Success Community.



## Exhibit D

### Data Storage Policy

#### **ACCELA, INC.** **DATA STORAGE POLICY**

The Licensee's subscription comes with a limit of 2.5TB data storage for all cloud environments. Data storage includes:

- Transaction data;
- Reference data;
- Configuration data;
- Documents and Report Files;
- Backup copies; and
- Other data stored by Accela on behalf of the customer.

Additional storage can be purchased from Accela in blocks of 500GB, with a price of one thousand dollars (\$1,000) per year. When Licensee approaches the 2.5TB limit, it will begin receiving monthly notifications highlighting data usage levels across its environment. Once the 2.5TB limit is reached, a charge of one thousand dollars (\$1,000) for an additional 500GB will be automatically added to the Licensee's subscription renewal.

#### **Data Retention**

If the Licensee's Software as a Service ("SaaS") subscription expires or is otherwise terminated, Contractor will initiate its data retention processes, including the deletion of licensee data from systems directly controlled by Contractor.

- If a Licensee's SaaS subscription expires or is otherwise terminated, Contractor will store its customer data, as defined in the master agreement between Licensee and Contractor, for ninety (90) days (the "Retention Period"). During the Retention Period, provide Licensee with a notice indicating its intention to delete its Customer Data.
- After the Retention Period, Contractor will, within a commercially reasonable amount of time, disable the account and delete the customer data, including any cached or backup copies.

History and log data will be available to customers in real-time for up to 2 years in production and 1 year in non-production unless otherwise specified. After 2 years, the history data will be archived and retained for up to 7 years. This data will be provided to the customer upon request.

#### **Frequently Asked Questions**

##### **Can Licensee track its storage usage on the Accela Cloud?**

It's not currently possible to track storage usage in the Civic Platform application. However, Licensee will receive a report detailing its data usage annually, at the time of renewal. Licensee can request this information at any time outside of the renewal period by submitting a support case through Accela Customer Support. When Licensee approaches the storage limit, it will receive monthly notifications particularizing its storage usage.

##### **What will happen if Licensee exceeds its storage limit?**

If Licensee's Accela Cloud instance exceeds the storage limit, it will receive notification and a charge of one thousand (\$1,000) per 500GB of usage will be billed at the time of subscription



renewal.

**Can I increase my storage limit?**

Yes. Storage limits can be increased by purchasing additional storage in blocks of 500GB at one thousand dollars (\$1,000) per year.

Exhibit E

RFP Response

(next page)



THE  
HEART OF  
GOVERNMENT™

December 14, 2023

# Accela and the City of San Bernardino

## ♥ Response to RFP #F-23-78

Land Management System



December 12, 2023

Ms. Linda South  
City of San Bernardino  
290 North D Street  
San Bernardino, CA 92401

Re: RFP #F-23-78 – Land Management System

Dear Ms. South and Members of the City Evaluation Panel:

We are pleased to present Accela's latest generation permitting solution to the City of San Bernardino.

Accela aims to elevate our longstanding partnership with the City and modernize you beyond legacy solutions Permits Plus and Velocity Hall. Our integrated approach, utilized by 600+ agencies across the globe, prioritizes back-office efficiencies within a citizen-first framework. This recommendation to upgrade to our Civic Applications is rooted in a deep understanding of the City's current realities and future goals.

As an enterprise government technology provider, Accela offers the ability to seamlessly grow into a suite of 10+ applications hosted on the Civic Platform — all poised to tackle various City needs and leverage your investment. In phase one, we present the Civic Applications for Building and Planning to prioritize fully transitioning onto a modern permitting platform. Additional Civic Applications for future consideration include Service Request Management, Business Licensing, Cannabis Regulation, Short Term Rentals, and more.

As part of this proposal, we have created the right partnerships to ensure the City's goals are exceeded. This starts with ePermitHub for integrated electronic plan review and extends to Rapid Scheduler for inspection scheduling, PowerBI dashboards and analytics, ESRI for mapping, and DocuSign for electronic signature.

For professional services, we joined with premier Accela implementation partner, Gray Quarter, who has deep experience in migrating from Permits Plus to the Accela Civic Platform.

When governments and technology work together, great things happen. And when best-in-class technologies work together, cities benefit tenfold.

We are confident we offer the best solutions to holistically improve your business operations and invest in your success. The following response outlines our approach to meeting your project goals, engaging with your citizens, and satisfying the needs that are most important to City stakeholders.

I am authorized to bind the company contractually. For any questions regarding this response or subsequent phases, please contact Arielle Mallen at (925) 359-3527 [or amallen@accela.com](mailto:amallen@accela.com). Please [copy\\_rfp@accela.com](mailto:copy_rfp@accela.com) on any correspondence.

Thank you for your consideration,

DocuSigned by:  
  
56C2716C41B4461...

Dennis Michalis  
Chief Revenue Officer

# Table of Contents

Table of Contents .....	5
1 Executive Summary .....	9
1.1 Presenting the Accela Solution .....	9
1.2 Implementing with Proven Partners .....	11
1.3 Moving Forward Together .....	11
2 Understanding of Project Objectives .....	12
3 Specific Proposal Requirements .....	17
3.1 Programming Languages .....	17
3.2 Operating Systems .....	17
3.3 Database .....	18
3.4 User Interface Configurations .....	18
3.5 Reporting Capabilities .....	18
3.6 Electronic Document Management Capabilities .....	24
3.7 Workflow Capabilities .....	24
3.8 Application Security .....	27
3.9 Application Software Functionality Requirements .....	29
3.10 Software Upgrades.....	29
3.11 User-Access Requirements by Module.....	31
3.12 Hosted/SaaS Model.....	31
3.13 Hardware Requirements .....	34
3.14 Integration/Interface Capabilities .....	34
3.15 Cost Considerations .....	34
3.16 Mobile Field Computing .....	36
3.17 Telephone and Other Support.....	38
3.18 Implementation Methodology .....	42
3.19 Conversion Costs.....	44
3.20 Training and Education.....	45
3.21 Project Management.....	47
3.22 Subcontractor and Third-Party Relationships.....	48
3.23 Customer Implementation Responsibilities .....	48
3.24 Sample User and Technical Manuals & Other Documentation .....	49

3.25	Vendor/Reseller Information .....	52
3.26	Technology Direction .....	52
3.27	Vendor Financial Information.....	53
3.28	User Groups .....	53
3.29	References and User Base.....	55
4	Detailed Proposal and Contractual Requirements.....	57
5	Appendices .....	67

**About Accela**

Accela provides market-leading SaaS solutions that empower governments worldwide to build thriving communities, grow businesses and protect citizens. From planning, building, licensing and permitting, to service request management, environmental health and more, Accela's offerings accelerate efficiency and transparency in governments of all sizes. Powered by Microsoft Azure, Accela's open and flexible technology helps agencies address specific needs today, while ensuring they are prepared for any emerging or complex challenge in the future. Accela's solutions serve more than 80 percent of America's largest cities. Accela is headquartered in San Ramon, California, with additional offices around the world. For more information, visit [www.accela.com](http://www.accela.com).

**Disclosure**

In relation to future versions of planned system enhancements or future product direction, the information contained in this material is not a commitment or legal obligation to deliver any of the features or functionality described herein.



## Exhibit List

Exhibit 1: Accela offers ready-to-deploy Civic Applications unified on a single, scalable, and extensible platform.	10
Exhibit 2: Key Benefits of Accela Planning .....	13
Exhibit 3: Key Benefits of Accela Building .....	15
Exhibit 4: Example dashboard leveraging Accela Insights .....	19
Exhibit 5: Accela’s Ad hoc Reporting Tool .....	20
Exhibit 6: City of San Diego Development Services Permit Executive Dashboard .....	22
Exhibit 7: City of San Diego Executive Project Dashboard .....	22
Exhibit 8: Accela’s Azure Cloud Environment .....	23
Exhibit 9: Clean lines, color-coded and icon-based status indicators, and an HTML5 responsive design allow your agency to quickly move applications through the unique business processes to take them from intake to approval. ....	25
Exhibit 10: The Detail Card View allows users to see the detailed step information that is pertinent to a specific workflow task so they can track, update, and move an application forward. ....	26
Exhibit 11: Accela maintains these key security certifications within our products. ....	28
Exhibit 12: Software Upgrades .....	30
Exhibit 13: Increase time to value with ready-made solutions that respond to the rapid modernization of technology. ....	32
Exhibit 14: Accela and Microsoft Azure – better together .....	33
Exhibit 16: Error Classification Definitions .....	40
Exhibit 17: Target Initial Response Time by Case Severity .....	41
Exhibit 18: Gray Quarter Implementation Methodology .....	42
Exhibit 19: Typical Sprint Activities .....	43
Exhibit 20: Sample Project Schedule .....	44
Exhibit 21: City Project Resources .....	48
Exhibit 22: Sample Civic Platform User Guide Table of Contents .....	50
Exhibit 23: Sample Administrator Guide Table of Contents .....	51
Exhibit 24: Sample Project Schedule .....	51
Exhibit 25: Example of Northern California User Group Presentations .....	54
Exhibit 26: Gray Quarter California Client List .....	55



*(This page was left intentionally blank)*



# 1 Executive Summary

The City of San Bernardino (hereinafter, the City) faces an incredible opportunity to modernize your Land Management System and transform how citizens interact with your government.

## 1.1 Presenting the Accela Solution

At Accela, we see the challenges that affect a government and its citizens, and we see how innovative technology can help solve those problems.

We bring over 40 years of innovation dedicated to government, serving 80 percent of the top 100 US cities, including California neighbors such as San Diego, Sacramento, Oakland, Moreno Valley, and Eastvale. Our approach is thoughtful, and our proposal is value-driven. Our objective is to boost operational efficiency by leveraging leading methodologies and contemporary technologies, such as automated workflows, online portals, and mobile solutions tailored to address the evolving challenges within the permitting industry.

We stand in partnership ready to support the City in aligning its technology goals and improve service to your staff and citizens. Your project aims to streamline processes, minimize manual efforts, enhance integrations, and align with superior business practices. We can help.

Our solutions empower 275M+ residents and businesses worldwide. Our cloud-based productivity and citizen engagement offerings include planning, building, licensing, service requests, environmental health, and more. The City can leverage common services like GIS, mobile tools, dashboards, online payments, and web portals to further extend Accela's capabilities.

Our solutions benefit the City by:

- **Increasing agency collaboration and efficiency delivering a unified citizen experience** – We can integrate multiple agencies into a single platform, enabling them to share cases and information.
- **Leveraging the work we have done for other clients** – We have more than 600 customers, so agencies never start from scratch.
- **Addressing your most pressing challenges** – Our Civic Applications are preconfigured but flexible and deploy on the most robust platform, backed by years of domain expertise built-in.
- **Meeting changing regulations and workflows** – Our platform's flexible deployment options and citizen engagement software help remove friction between residents and agencies. Our platform is built specifically for community development and regulation, whereas some competitors use generic platforms to build custom solutions.

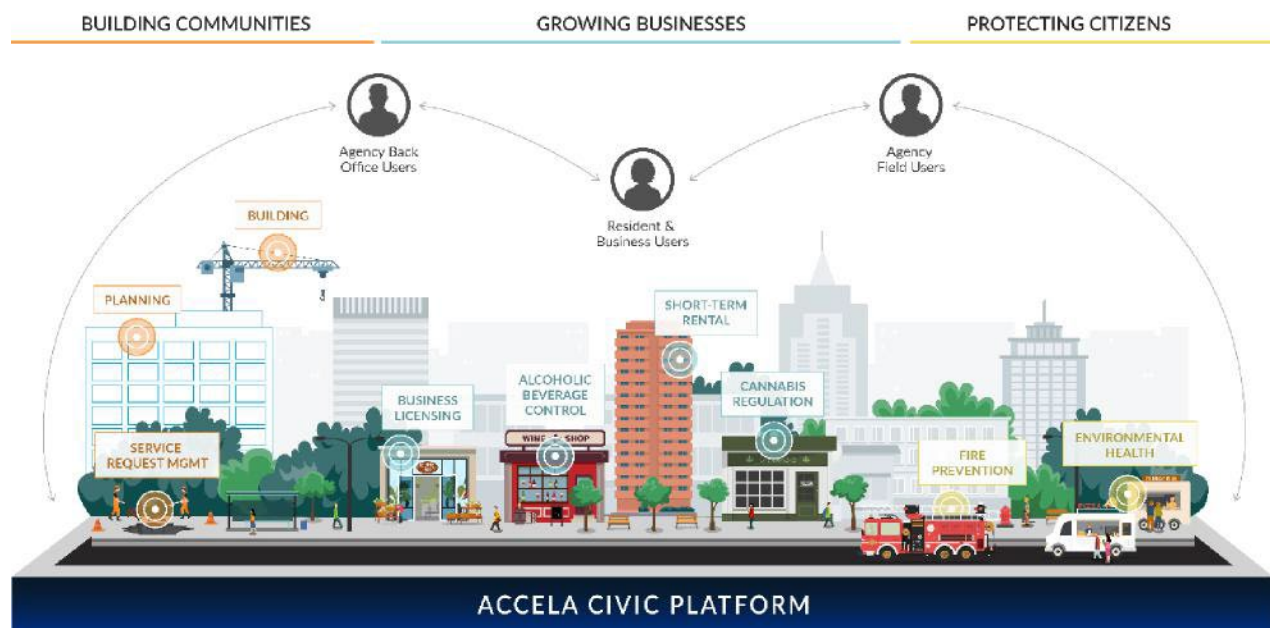
The following highlights our proposed solution:

- **A comprehensive permitting, licensing, and building solution** that tracks and manages all your permitting, plan review, inspections, code enforcement, case management and other development activities to ensure improvement in cross-city collaboration and increased efficiencies for both residents and City staff. The information available will allow your entire staff to have complete detailed information instantly and reduce staff hours spent on processing applications. Accela's Civic Applications for Building and Planning are the right balance of out-of-the-box functionality based on best practices and yet allow for personalization to meet the City's exclusive needs.



- **Accela SaaS**, using the Microsoft Azure cloud, allows the City to scale, reduce costs, and leverage the existing skills of current staff.
- **Accela Mobile** extends processing capabilities to the field for inspections and code enforcement.
- **Accela Citizen Access** provides the City with better, faster services to citizens and businesses using a citizen-facing web portal. Improve customer service via 24/7 access and allow citizens to submit applications, check status, pay fees, and conduct agency business digitally, 24x7 on their preferred device. Also, keep citizens informed via text and email notifications. Streamlining processes and providing more self-service options speed up the permitting process from start to finish, reduce front counter visits, and provide a higher level of service to the customers you serve.
- **Accela GIS** delivers mapping and routing functionality to the enterprise. This overlays your data onto Esri GIS maps and allows customers to initiate and manage a variety of activities from a geospatial platform. Accela has been a trusted Esri Business Partner for 20+ years and is a recipient of the Esri Partner Award for the Civic Platform.

## Accela at the Heart of City Operations



**Exhibit 1: Accela offers ready-to-deploy Civic Applications unified on a single, scalable, and extensible platform.**

For your project, we have brought together leading technology providers to ensure complete success:

- **ePermitHub**, the market leader for electronic plan review. Since 2017, jurisdictions such as Moreno Valley and Clark County, NV have streamlined their business processes, reduced paper, and conserved resources with ePermitHub.
- **Gray Quarter** is world-class in the design, implementation, training, and support of the Accela Civic Platform. Experts in government licensing and land management processes, Gray Quarter provides industry-leading solutions that help governments like the Cities of Anaheim, Moreno Valley, and Seattle. Specific services include Technical Services, Managed Services, Solution Architecture, Training, Project and Program Management.





Together, we offer the City a seamless and fully integrated approach executed in phases that prioritize permitting first and ensure success. The City can expect connected data across ePermitHub, Laserfiche, DocuSign, Esri GIS, PowerBI, iWorks, New World ERP, Host Compliance (Granicus), and more. As needs evolve, Accela's enterprise platform positions you to seamlessly extend into other case types, workflows, or Civic Applications (e.g. Short-Term Rental and Business Licensing) to further leverage the investment.

Lastly, beyond the technology lies our user community. As 29 of the top 50 California cities (and 32 of 35 California counties) use Accela, the California community we are cultivating is invaluable. There are over 500+ Accela Subject Matter Experts (SMEs) within our online community. In the Spring, we will host our next in-person Southern California user group meeting where 150+ agency attendees gather to share best practices. Topics include resource deployment, governance, hiring, online digital experience, analytics, and AI strategy all within local government.

We hope you take advantage of the power of our scalable, enterprise offering and look forward to working on a scope of work together.

## 1.2 Implementing with Proven Partners

We propose Gray Quarter as the owner of professional services for the City's project.

They will lead all implementation workstreams. Their leadership has over 45 years of combined Accela-employed experience, thus creating a significant technical product gap while at the same time being able to craft unique solutions to spotlight the Accela solution. Gray Quarter brings forward not only industry-best professional services but a marketplace of products that enhance the user and citizen experience. These products are layered within the Accela solution, complement the user/citizen journey, improve internal integrations, and are built on best practices.

## 1.3 Moving Forward Together

Accela values this opportunity to earn the City's business and demonstrate why Accela offers you the best solution to meet your system requirements. Our proposal goes into more detail about how we'll create these results and what you can expect during the process.

After a thorough review of industry providers, we are confident that the City and the evaluation committee will conclude that **Accela is a partnership worth pursuing**. We would love to have the City of San Bernadino join the Southern California user group as we continue to provide technology that meets policy.



## 2 Understanding of Project Objectives

Accela understands that this project aims to replace the City's current land management system, Permits Plus, with an enterprise solution. The City seeks a comprehensive, enterprise platform that addresses current and future needs. The goal is to enhance operational efficiency by adopting best practices, automated workflows, and modern technology, including online portals and mobile solutions based on the changing challenges of the permitting industry.

The project's objectives include streamlining processes, reducing manual efforts, improving integrations, and adhering to best business practices. Success will be measured by the timely and budget-conscious implementation of the new system. The evaluation criteria focus on how well the proposed solution meets the City's functional requirements.

Specifically, as part of this proposal, we have carefully executed a holistic strategy bringing together the right solutions and partnerships to ensure the City's goals are exceeded:

- Deliver superior online customer experience to Citizens
- Provide reporting and analytics for City leadership to make proactive decisions for resource deployment
- Empower back-office staff to manage caseloads more efficiently
- Provide training during implementation for power users to further enhance the systems
- 24/7 acceptance of electronically submitted plans and permits
- Robust and unlimited Citizen-facing portal for online payments, document upload, tracking communications, etc.
- A clear strategy to migrate from Permits Plus to Accela
- Strong integrations between Accela and Esri GIS, Laserfiche, New World ERP, Bluebeam, DocuSign, PowerBI, cashiering, and more
- Access to Accela University, Success Community, and Accela's Learning Management System for free and low-fee ongoing training
- A 50+ unique agency Southern California User group online and in person (Annually)
- Reliable customer support and a named account executive for escalations
- Ability to accommodate future permitting activity types like Short Term Rentals.

We have provided overviews of our proposed Civic Applications for Planning and Building in this section to show how they'll meet the City's objectives.



## Accela Civic Application for Planning



Accela Civic Application for Planning helps communities build and grow safely with zoning, planning, plan review and approval, complaint management, and code enforcement automation.

Please click above to view a demo of Accela Planning or visit: <https://www.youtube.com/watch?v=XAi1Og25Pok>

Accela Civic Application for Planning helps the City improve community quality, promote economic growth, and protect resident welfare.



**Exhibit 2: Key Benefits of Accela Planning**

**Optimize Development with Accela's Civic Application for Planning:** Accela's Civic Application for Planning revolutionizes the development process, empowering government agencies to streamline planning operations, foster growth, and enhance citizen engagement. Designed with the singular mission of modernizing local governments, this comprehensive solution transforms the way agencies manage permits, zoning, compliance, and code enforcement.

**Zoning Capabilities for Effective Land Use:** Efficiently manage zoning requirements and regulations with our application's zoning capabilities. Make informed decisions regarding land use, density, and development standards to achieve optimal urban planning and community development.

**Seamless Permitting Management:** With our Civic Application for Planning, agencies can efficiently manage and issue a wide range of permits crucial to development. From building permits to land use permits and zoning approvals, the application simplifies the process, reducing administrative burdens and expediting approvals.

**Transparent Project Tracking:** Stay in control of development projects with our intuitive project-tracking capabilities. From initial submission to final approval, agencies gain real-time insights into project status, enabling transparent communication with stakeholders and ensuring projects stay on track.

**Empowered Code Compliance and Enforcement:** Accela's Civic Application for Planning reinforces code compliance, ensuring development projects adhere to zoning regulations and other planning codes. With automated workflows, agencies can proactively address violations, promoting orderly development and enhancing community safety.

**Data-driven Insights with GIS Integration:** Harness the power of Geographic Information Systems (GIS) integration to visualize and analyze planning data. Effortlessly identify trends, uncover hidden patterns, and make data-driven decisions, optimizing resource allocation and bolstering informed planning.

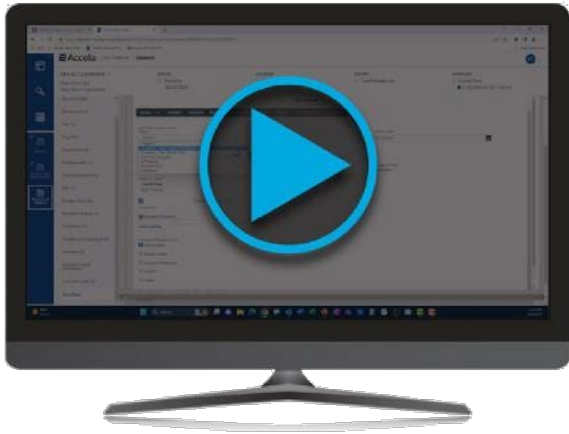
**Enhanced Public Engagement and Communication:** Engage with the community like never before through our application's public engagement features. Offer citizens online portals for submitting planning applications and receiving real-time updates on project progress, fostering transparency, and building trust with the public.

**Streamlined Workflow Automation:** Experience newfound efficiency through our application's workflow automation capabilities. Standardize planning processes, eliminate manual tasks, and reduce delays, allowing agencies to focus on what matters most - driving development.

**Insights through Reporting and Analytics:** Empower your agency with actionable insights using our robust reporting and analytics tools. Measure performance, assess outcomes, and make data-backed decisions to optimize planning strategies and fuel future growth.

In addition to its core when it comes to development, Accela's Civic Application for Planning is the catalyst for transformation. Drive innovation, embrace efficiency, and engage with the community like never before. Unlock the full potential of your planning endeavors with Accela - your trusted partner in modernizing government operations.

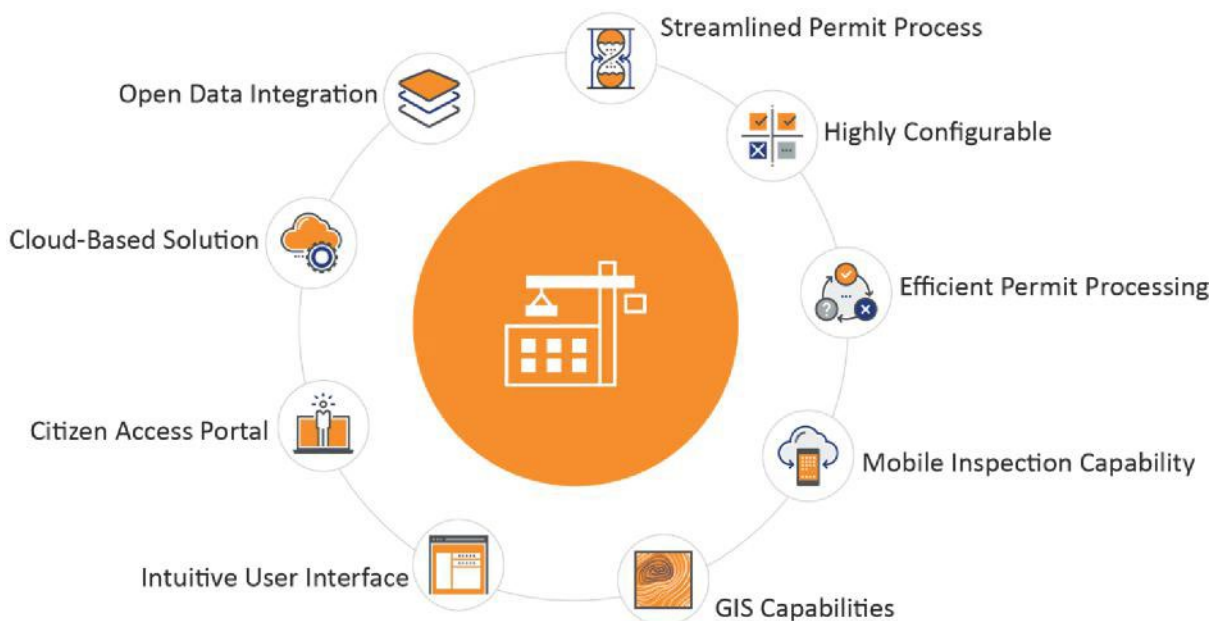
## Accela Civic Application for Building



Accela Civic Application for Building provides an end-to-end cloud-based solution for building permit processes, including web-based access for citizens and back-office staff as well as mobile inspection capabilities.

Please click the screen above to view a demo of Accela Building or visit: <https://youtu.be/OVatnLNFDKw>

Accela Building includes out-of-the-box configurable workflows, business rules, reports, and GIS integration to help streamline agencies' permitting process.



**Exhibit 3: Key Benefits of Accela Building**

**Streamlined Permit Process:** Accela Building simplifies the permit application process for residents, enabling them to conveniently submit applications, documents, and fees online. This eliminates the need to visit agency offices, saving time for applicants and reducing administrative burden for agencies.

**Highly Configurable:** While Accela Building is an out-of-the-box solution, it also offers high configurability. Agencies can tailor the platform to meet their specific processes and requirements, ensuring seamless integration into their existing workflows.

**Efficient Permit Processing:** The platform allows reviewers to access applications and plans simultaneously, promoting collaboration and reducing bottlenecks in the review process. Additionally, it integrates with other systems to provide access to code and zoning information, further streamlining the approval process.

**Mobile Inspection Capability:** Accela Building equips inspectors with a mobile app that works both online and offline, enabling them to conduct on-site inspections efficiently. This capability optimizes routes, reduces errors, and increases productivity.

**GIS Capabilities:** With built-in Geographic Information System (GIS) capabilities, Accela Building enhances the visualization and analysis of building-related data. Agencies can better understand spatial relationships, make data-driven decisions, and improve overall planning and development.

**Intuitive User Interface:** Both agency staff and residents enjoy a modern and user-friendly interface accessible from any device. This ensures a seamless and pleasant experience for all users throughout the permit process.

**Citizen Access Portal:** Builders can leverage the Citizen Access Portal to easily submit applications, schedule inspections, and track the progress of their permits. This level of transparency and accessibility fosters better communication between agencies and applicants.

**Cloud-Based Solution:** Accela Building operates on a cloud-based infrastructure, eliminating the need for agencies to worry about managing complex hardware and software resources. This results in a cost-effective and scalable solution.

**Open Data Integration:** The platform offers platform-wide APIs and SDKs, enabling smooth integration with complementary solutions to address the diverse needs of agencies. This flexibility allows for future expansions and enhancements as requirements change.

In addition to its core features for building permits, Accela Building provides functionalities for Trade License Verifications and Code Enforcement. These capabilities empower agencies to efficiently manage licensing lifecycles, online applications, inspections, and fine collections, further streamlining agency operations.

With automation at every stage, from application intake to inspection scheduling, Accela Building ensures a transparent and efficient permit process that benefits both agencies and applicants alike. Its out-of-the-box nature, GIS capabilities, and mobile app's offline functionality make it a comprehensive solution for modernizing building permit management.



## 3 Specific Proposal Requirements

Include the following items in the order listed below (and indexed in the same manner) in your response to this Request for Proposals (RFP).

During the assessment phase of the project, key issues were discussed regarding alternate information management solutions. Following is a list of specific concerns of the City. Please respond to each issue in detail regarding how the proposed solution will satisfy each concern.

Accela has provided our responses to the Specific Proposal Requirements outlined in Section 3 of the RFP in this section.

### 3.1 Programming Languages

Please provide information on all programming languages used for each proposed required application.

Accela's solutions are developed with open architecture and common best practices and utilize publicly available open-source technologies, such as common best design patterns (Adapter, Factory, Facade, etc.), and common programming languages. Accela developers use industry-standard IDEs and tools for developing our applications. There are no proprietary technologies in the product. This architecture ensures that the complete Accela ecosystem is scalable for easy deployment.

The Accela product suite consists of applications developed in Java and C# for cloud, web, and mobile platforms. The specific IDEs and compilers used are dependent on the Accela application and platform. Our Java/J2EE (JDK 1.8) based applications are developed using the Eclipse IDE/IntelliJ Idea. Our C#/[ASP.NET](#) based applications are developed using Visual Studio 2013. Our mobile applications are developed using Xcode for iOS, Eclipse for Android, and Visual Studio for Windows Phone. IDE tools are used for code violations including Syntax and errors, and Veracode for Security code scans and Application scans.

### 3.2 Operating Systems

Please provide a description of the proposed server and desktop operating systems used by your products and which server software option is being proposed (include server software name, year, and version).

We are proposing the Accela Civic Platform. The Civic Platform is a SaaS solution, hosted in the Microsoft Azure cloud. Access to the solution is accomplished through standard and supported web browsers. Accela Mobile supports the most common operating systems in the field: Android, Windows, and iOS. In short, the Civic Platform can be accessed through a desktop, tablet, and/or mobile device to carry out all permitting and licensing tasks.

### 3.3 Database

The City expects the information system to be based on a very stable and flexible relational database standard. The City's preference is MS SQL. Please briefly describe the relational database platforms available in the use of your products and which database option(s) are being proposed (include database management system name, year, and version).

The Accela solutions are deployed in a three-tier model consisting of the database tier (MSSQL), Business Services/Application tier (J2EE web application leveraging web services for data exchange), and Presentation/Public Web tier (predominantly Java and .NET).

The foundation of the solution is the *Database Tier*, which contains a data schema specifically designed for government-focused key business data, activities, and processes.

- **Government-focused data schema** – Leveraging decades of industry experience, our solutions data schema allows end users to quickly access the data they need to perform their roles.
- **Industry-standard data access** – Our solution architecture application layer accesses the data layer using the Java Data Base Connectivity (JDBC) standard. External applications can access the data layer via either JDBC or ODBC using ANSI SQL92 statements.
- **Single database across enterprise platform** – Since our solutions access the same, consolidated database, all end users work with consistent, accurate, and up-to-date information across the entire enterprise.

### 3.4 User Interface Configurations

The City desires to move forward with advancing technologies and, therefore, prefers a solution that is a web-based application and browser-agnostic environment that can be run on desktop and mobile platforms. Screen-scraping technology configurations will not be considered. Please describe your client architecture.

We are aligned with the City's preference for a web-based application. The Civic Platform is a web-based, SaaS solution, hosted in the Microsoft Azure cloud. Accela Civic Platform can be accessed through a desktop, tablet, and/or mobile device to carry out all permitting and licensing tasks.

The back-office Accela system is supported on Chrome and MS Edge browsers. The public-facing Citizen Access portal is supported on Chrome, Firefox, MS Edge, Safari, and Opera browsers.

### 3.5 Reporting Capabilities

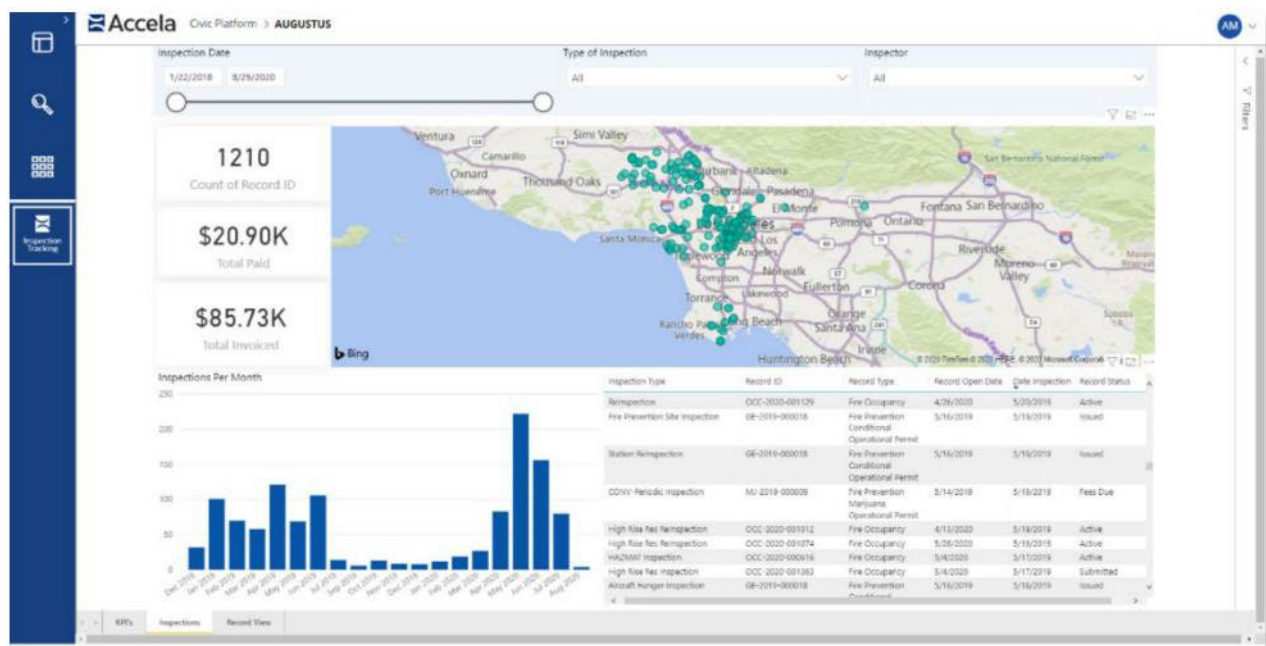
Please provide information on overall system/solution reporting capabilities (e.g., canned reports, ad hoc reporting, executive dashboard, etc.) Please define the reporting architecture that is used (e.g., Crystal, Cognos, SSRS, or other[s]).

Leveraging Power BI technology, included in your seat license cost, Accela provides an embedded data visualization tool known as Accela Insights. Accela Insights allows end-users to create modern and interactive dashboards. This tool provides multiple views into your Accela data through visualizations representing different

information and insights. It does this with an interface simple enough for end-users to create their dashboards while accessing their data through business terms they are familiar with and understand.

Accela Insights allows stakeholders to consume the information that matters the most, while also having the chance to interact and drill into more information in a self-sufficient experience. It empowers agencies to:

- Provide operational dashboards to track daily operations and provide a comprehensive snapshot of performance, analytical, and strategic dashboards.
- Provide analytical dashboards to use data from the past to identify trends that can influence future decision-making.
- Provide strategic dashboards to track performance concerning your key performance indicators to better align actions with strategy.
- Provide a single source of truth for tracking department and organization-wide metrics.
- Empower inspection managers to understand team performance and key metrics more easily.
- Enable inspectors to see and track their inspection activities and optimize routes for upcoming tasks.



**Exhibit 4: Example dashboard leveraging Accela Insights**

Our reporting and analytics offerings even go beyond dashboarding with our Ad hoc Report Writer, which provides an easy point-and-click user interface and user-friendly views of our solutions data, offering the City the ability to design, deploy, and manage its reports and documents (i.e., form letters) **without requiring any third-party reporting tools**. Due to its ease of use, report writers do not need specialized report-writing skills or in-depth knowledge of our solution's data schema. A basic tabular report can be written in less than 15 minutes.

Reports may be immediately published in our solutions without the assistance of the IT team or administrative staff. Tabular reports automatically provide hyperlinks that allow users to launch and view related Record data in our solutions from within a report. In addition to creating tabular reports, users may also create formatted forms and documents such as contracts, permits, rental agreements, etc. Comprehensive administrative functions are available for these reports, forms, and documents, such as controlling access to creating/running

reports, controlling access to data views, managing report menu visibility, automated generation of reports, automated emailing of reports, automated saving of reports to a document management system, etc.

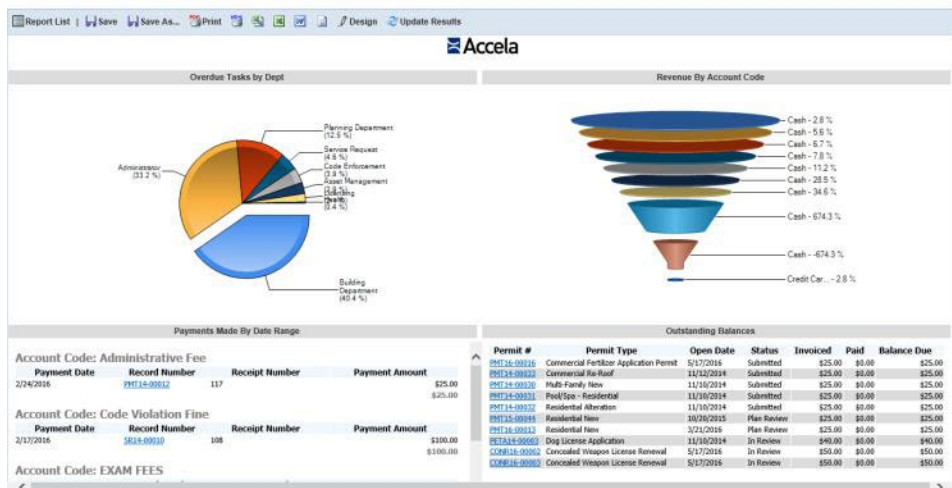
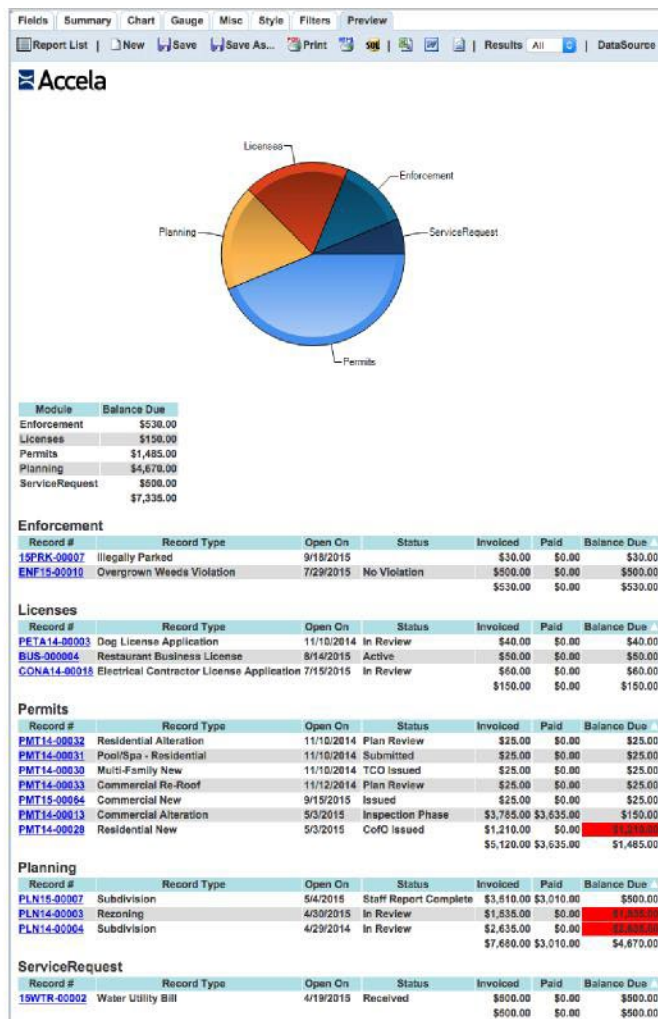


Exhibit 5: Accela's Ad hoc Reporting Tool

Reports can be generated in multiple formats depending on the need including Hypertext Markup Language (.html), Adobe Acrobat Portable Document Format (.pdf), Microsoft Word (.doc), Rich Text Format (.rtf), delimited text by tab or comma, Microsoft Excel Spreadsheet format (.xls), and XML. Reporting tools provide services to format, spell check, and design documents from simple to detailed designs.

In addition to Accela's built-in Ad Hoc Report Writer tool, our solutions also support reports developed in the major report authoring tools on the market including MS SQL Server Reporting Services and Crystal Reports. Accela centralizes your reporting experience for all your reporting needs within the Civic Platform's Report Manager. Leveraging this single-source platform, users with access to configure and deploy reports can secure reports to only the intended user groups, attach them to workflows, deploy them to citizen access, and many other features.

Users can create, save, organize, and maintain an unlimited number of reports from the Report Manager. Report parameters can be established, permissions assigned, and reports can be attached to screens and associated with workflow tasks (for example, "print permit" for a specific record). The Report Manager manages the configuration and printing of all reports, including permits, documents, statistics, analytics, and form letters. Hard copy permits may be printed manually, as part of a workflow task, or as part of a batch process. In addition to Accela's robust reporting offerings, built-in functionality allows the following:

- **CSV Export** – End users can export the contents of any List screen directly to an Excel\ spreadsheet for reporting and analysis activities.
- **Filters and Global Searches** – Filters and Global Searches let end users see data they need to see, in the way they want to see it. This allows end-users to do their jobs more effectively. Administrators configure role-based filters, thus allowing end-users to see only authorized data. Global Searches are dynamic queries that either administrators or end users can configure and save.

Additionally, our Report Manager deploys Microsoft Word documents for mail-merge reporting against data within Accela. These reports can be deployed throughout the application seamlessly. They do not require the deployment of any additional software or services onto client/end-user machines to run the reports from within the system.

Accela's reporting and analytics solutions also offer the ability to deploy reports virtually anywhere within the system and make them available for execution manually, automatically, or only when specific milestones have been met. The City is also able to restrict who can execute reports based on role-level security and/or application status.





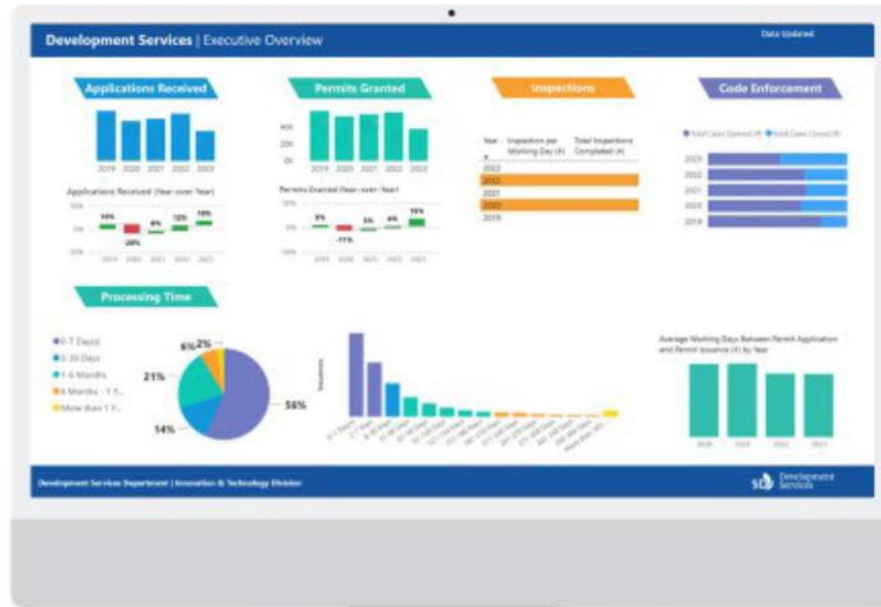


Exhibit 6: City of San Diego Development Services Permit Executive Dashboard

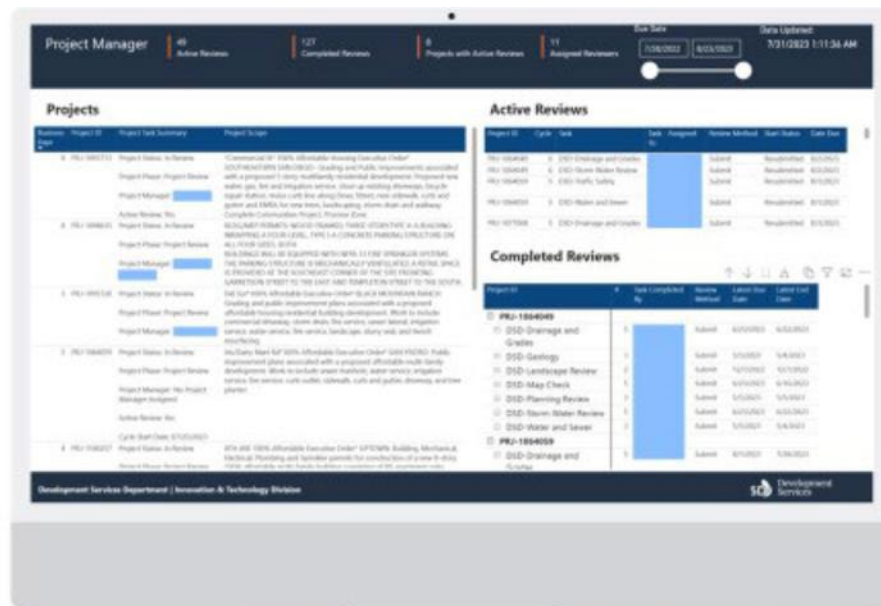


Exhibit 7: City of San Diego Executive Project Dashboard

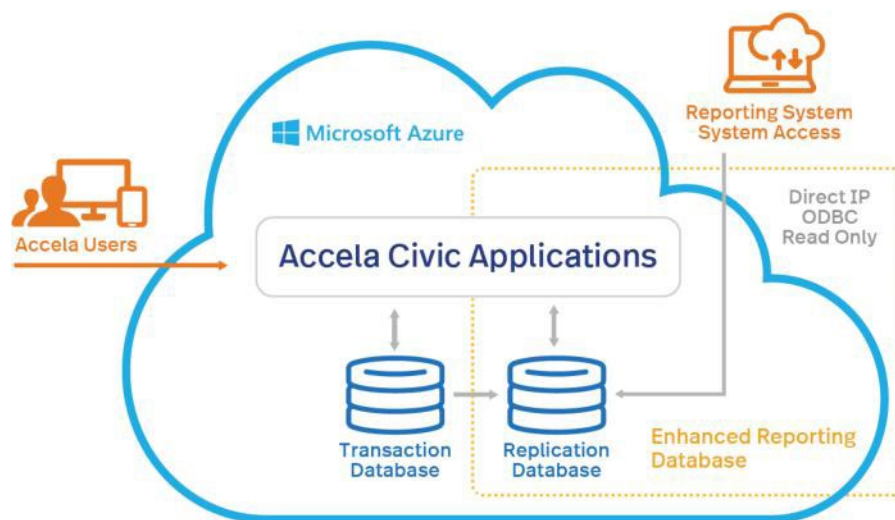
### 3.5.1 Enhanced Reporting Database

Accela has created the Enhanced Reporting Database (ERD) option for our cloud customers. This gives the City direct, secure access to your raw Accela data within Microsoft Azure.

The Enhanced Reporting Database is a full replication of the Accela cloud-based transaction database providing near real-time syncing (seconds, not minutes) between the transaction database and the read-only reporting database. Customers access the Enhanced Reporting Database directly through an ODBC connector.

The system is designed for one-way copying of data — with no data synchronization or mirroring capabilities — to ensure high system performance is always maintained.

This offering is SQL Server-based, and available in Accela’s Azure cloud environment.



**Exhibit 8: Accela’s Azure Cloud Environment**

The City can leverage ERD to write live SQL queries against your Accela data, use it to import all your data locally and use your preferred tools.

ERD comes with a Power BI connector that provides an opportunity for agencies to leverage their Power BI enterprise license and deploy dashboards within Accela with third-party data leveraging our security framework and report manager interface.

### 3.6 Electronic Document Management Capabilities

Please provide information on your document management capabilities and options, including integration to third-party EDMS solutions. If your solution offers standard integration with any EDMS solutions, please list them and describe the integration capabilities.

Accela Document Service is an internal system feature that allows for the collection, naming, and organization of any type of electronically formatted document in its native format. Under Document Services, the City can grant specific privileges to end users to access this site to review documents pertinent to their inquiries or for other business purposes.

Additionally, Accela allows documents to be attached to virtually anything in the solution including properties (address, parcel), people (contacts and licensed professionals), records, and inspections. The solution also allows for bulk document upload (i.e. multi-select files), bulk printing, and bulk downloading.

Another document-related feature is the ability to scan documents directly from a local or networked scanner into our solutions without a user having to save the scanned file to a secondary location and then use the "Attach" feature in Accela, locate the document(s) in the secondary location and manually attach them thus saving significant time and effort.

Document access can be controlled by permissions including what is available to the public, they can possess their individual, City-defined statuses and can be configured to capture and store City-defined custom data fields that correlate to the Group and Type classifications related to the document.

Additionally, Accela's solutions have a robust Electronic Document Management System (EDMS) SDK that supports integration into most industry-standard EDMS/ECM applications. In some cases, a custom integration will be required for a specific EDMS/ECM application.

### 3.7 Workflow Capabilities

Please provide information on your system's workflow capabilities. Describe the integration level with all systems. If you have no workflow capabilities, please indicate so.

The flexible configuration of our solutions lets customers define and manage the sequence and requirements of the hundreds of steps involved in a workflow. The solution manages all types of regulatory activities. Permits or other case types the City desires may be configured at any time in the future by System Administrators to meet these yet unforeseen needs.

Accela's Workflow Designer can mimic the City's simple or complex workflow and allows every aspect of each key business process to be configured in our solutions. This tool efficiently guides each process from task to task, from initialization to completion, but it also

- Facilitates key task assignments
- Allows the definition of duration for each of the tasks
- Automatically sets due dates based on task durations

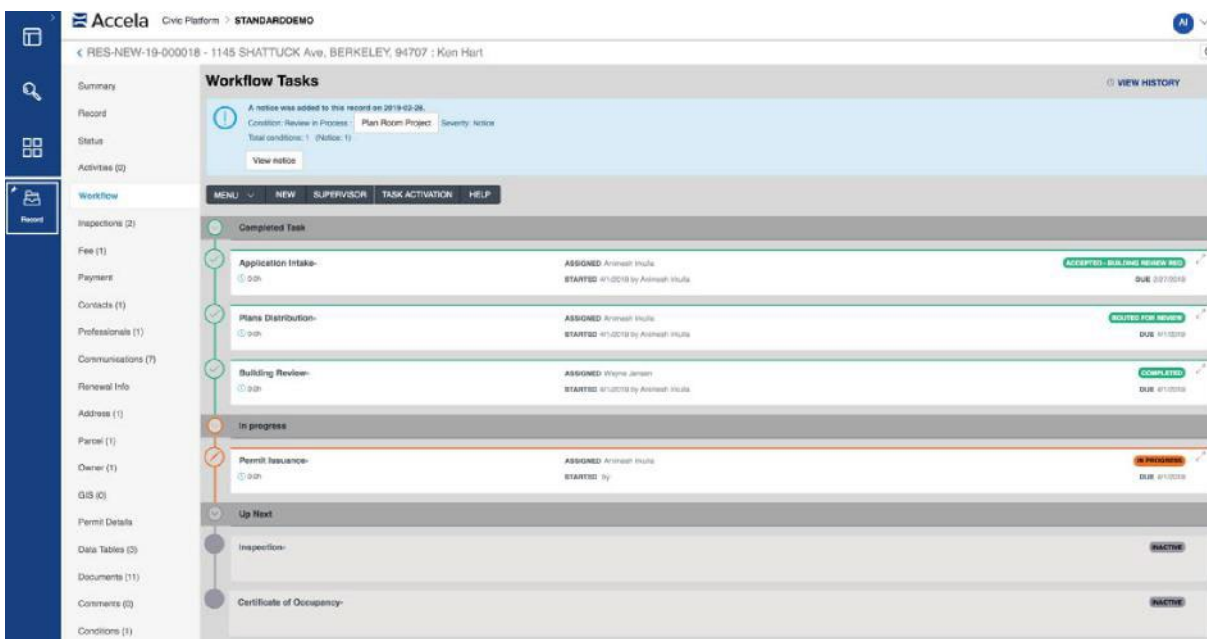
- Task tracking: Who is assigned to handle the task, task status, and location of pertinent data about the completion of the task

This workflow engine is the universal element in the Accela client space, acting as the eyes and ears to a myriad of public processes in city, county, and state governments. Accela's Workflow Designer has expanded this graphic design tool for workflow configuration to include the following major features:

- Support administrators to drag and drop widgets onto the canvas to visually build or edit a workflow process. The widgets may be process start and end points, forks, joins, flow lines, and tasks (including sub-processes).
- Support administrators in designing workflow and processes, and define tasks in processes, including setting task basics, associating task-specific information groups, setting task status, proximity alert, and e-mail notification.

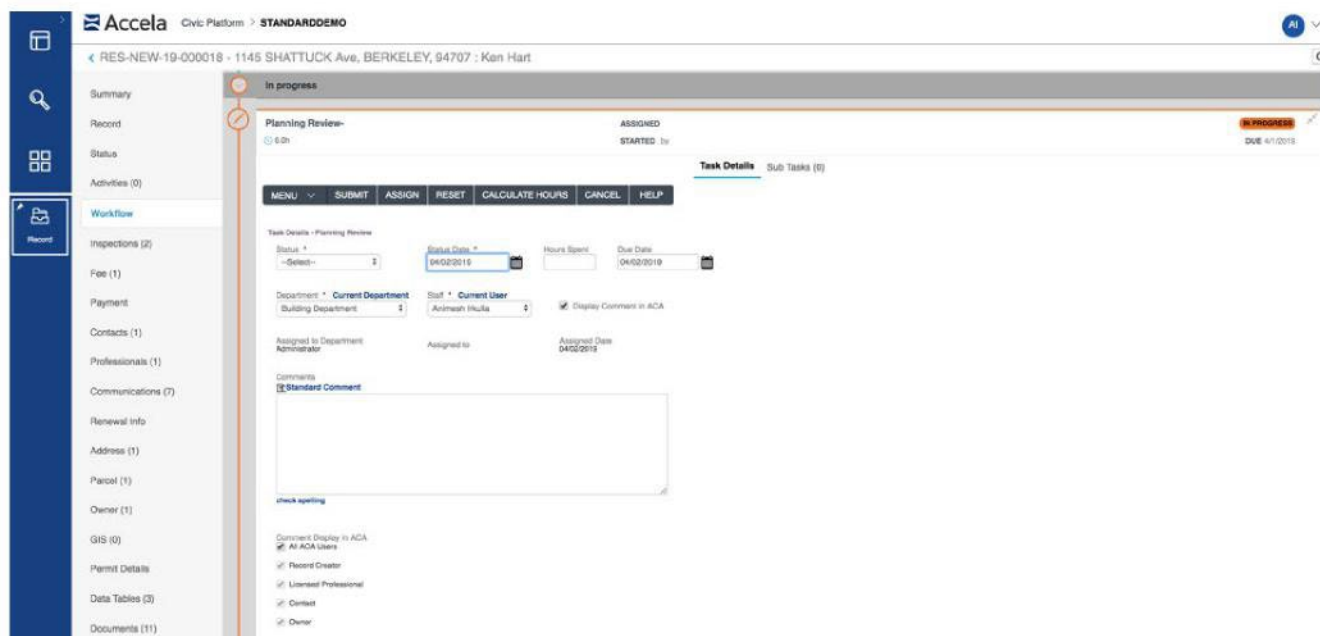
Each workflow task is represented as a milestone to be done sequentially, concurrently, or Ad hoc based on the business requirements of your agency. This includes task-specific status dispositions, custom data collection, time tracking, and workflow metrics management that help ensure you capture the right information at the right time. Workflow automation including generating internal and external communication via email, SMS, and alerts, generating applicable documents/forms, routing work tasks to other stakeholders, and automatically creating related records such as trade permits, licenses, etc. are all managed “under the hood” through Accela’s workflow design tool, thus keeping the end-user experience streamlined and efficient.

Each set of workflow tasks (*Completed*, *In Progress*, and *Up Next*), can be collapsed to help the user focus on a specific task or set of tasks. The *Completed* and *Up Next* tasks are collapsed by default. Users can quickly expand collapsed task sets and then expand the individual tasks that are most pertinent to their jobs. This puts important information at the user’s fingertips without presenting an overly detailed and distracting view of the entire workflow process. Ad Hoc tasks are displayed in the same manner, with *Completed* and *In Progress* tasks grouped so they can be collapsed or expanded.



**Exhibit 9: Clean lines, color-coded and icon-based status indicators, and an HTML5 responsive design allow your agency to quickly move applications through the unique business processes to take them from intake to approval.**





**Exhibit 10: The Detail Card View allows users to see the detailed step information that is pertinent to a specific workflow task so they can track, update, and move an application forward.**

The key components of the Workflow Designer feature include:

- **Workflow Tasks:** Each workflow process consists of a series of logically ordered, user-defined tasks that comprise a specific business process. The Workflow Designer allows these tasks to be handled one at a time or concurrently. It can change based on each task's status, for example, skipping certain tasks as appropriate, branching and/or looping to other tasks as needed, or repeating tasks when necessary.
- **Task Statuses:** Each task may have a series of Task Statuses that update and direct the task within the Workflow Designer process. These statuses are user-defined and control the various paths the workflow process takes using flow controls. However, because a task is just one component of an application, the task status may be different from its application's status. For example, if there are six tasks required for one application, all six tasks need to be completed before the application status can be "complete." Therefore, it is possible to have the status of one task be "complete" while the application status is still "in process".
- **Application Status:** Task Statuses can drive an overall application status, providing a high-level view of the progress of the workflow process. This is particularly useful in managing process timelines and high-level management reporting.
- **Task-Specific Information:** Task-Specific Information is key data entered during the Workflow Task update process. This component also drives task-specific checklists that are often critical components of workflows. Task-specific information fields can be marked as searchable for easy searches.

Accela's Workflow Designer is a powerful feature that is integrated with an agency's organizational structure. This lets administrators assign each task to an individual that works for the agency. Administrators can add sub-

tasks, also known as activities, to each task. Sub-tasks help create a more detailed workflow process or outline the steps involved in each main-level task. Administrators can also associate any type of document with a sub-task. Documents can give further instructions about a sub-task or record the results of the sub-task. For example, users can attach a report of the results of the plan review or upload the actual plans. A workflow

process represents all the tasks that an agency is responsible for concerning a certain application type. Users can determine the view, assignment, and search settings for workflow tasks for the My Tasks user screen.

For each task in a workflow process, users can set up a series of appropriate and user-defined task statuses, such as “Active,” “In Progress,” or “Complete.” Task statuses allow users to describe the current situation of a workflow task accurately. As users update workflow tasks, our solutions know which tasks to activate next, depending on how users set up the statuses. In this way, the process moves forward or where needed following user input. When users update a certain task, our solutions will update the task in the workflow for the record. However, because a task is just one component of an application, the task status may be different from its application’s status. For example, if there are six tasks required for one application, all six tasks need to be completed before the application status can be “complete.” Therefore, it is possible to have the status of one task be “complete” while the application status is still “in process.”

Every step in the workflow process is recorded in workflow history so that any user with assigned rights can view the history and assess the progression of the workflow for any given work order. Task assignments and due dates are automatically viewed through the system’s My Task feature. Individual users view their specific assignments and due dates through a Task portal; and supervisors can view assignments and due dates across the entire department.

## 3.8 Application Security

Please describe application and user security features/capabilities. Indicate any special security features (e.g., user security, function security, file security, field-level security, etc.) provided by the software. Please also confirm your support of Active Directory and if you provide single sign-on capabilities.

### 3.8.1 Security Compliance

As a provider of Software as a Service (SaaS) solutions for government, Accela prides itself on delivering an elevated level of data and cloud security by implementing a variety of measures to protect its customers. Along with in-depth audits for its network, applications, and databases, Accela’s use of encryption, user authentication, backup and recovery programs, and real-time network performance monitoring offers governments and the communities they serve the ability to provide innovative, reliable solutions securely.

Accela’s security is aligned with the National Institute of Standards and Technology’s (NIST) standards, Payment Card Industry Security Standards, and AICPA Trust Services Principles. Partner companies, like Microsoft, ensure their cloud services meet the FBI’s Criminal Justice Information Services (CJIS) standards, another high benchmark in cybersecurity. Accela’s software development lifecycle and operational processes align with the Open Web Application Security Project (OWASP).

These standards require security controls like identity management, multi-factor authentication, configuration controls, incident response, and change control. For CJIS compliance, there are also the added requirements that grant the FBI physical access to Microsoft’s cloud facilities for IT audits, to get detailed quarterly security updates, and for agents to conduct background checks on Microsoft personnel.

Accela maintains a broad set of controls across the areas of people, processes, and technology covering these areas:





- Application security
- Data security and lifecycle management
- Secure software and delivery lifecycle
- Audit and Accountability
- Business Continuity
- Change and Configuration management
- Datacenter / Infrastructure as a Service Security
- Encryption in transit and at rest
- Threat, Vulnerability, and Risk Management
- Identity and Access Management
- Mobile Security
- Incident Management and Response

Accela also maintains a variety of security certifications to demonstrate and provide third-party validation of its commitment to customer security, as shown in Exhibit 11.

			
<b>Accela holds SSAE 18 SOC 2 Type II</b>	<b>HIPAA HITECH</b>	<b>PCI-DSS v3.2.1 SAQ-D Service Provider</b>	<b>California Consumer Privacy Act</b>
Audited at least annually against the SOC reporting framework by independent third-party auditors	Audited annually against the national standards passed by the Health Insurance Portability and Accountability Act (HIPAA)	Self-assessed annually for SAQ-D service provider as an e-commerce merchant for its payment adapter integrations for Civic Platform	The California Consumer Privacy Act (CCPA), enacted in 2018, creates new consumer rights relating to the access, deletion, and sharing of personal information collected by businesses
Audit controls for data security, availability, and confidentiality as applicable to in-scope trust principles for each service			

**Exhibit 11: Accela maintains these key security certifications within our products.**

### 3.8.2 User Security

Accela's solutions provide a multi-level security system where the system administrator has full control over user access. This control on user access is granted based on a single user login ID and grants that user specific rights and privileges to the system.

Accela's solutions also allow system administrators to set up groups or roles and set security based on those such as read-only, update, or no access. Our security goes beyond this setup to the functional level, allowing administrators to set security down to a specified function. For example, an Investigator may have read-only access, but no access to "Add Fees".

These rights and privileges can be extended to internal users, other departments, outside agencies, and even public citizens and applicants to safeguard the sanctity of system information. Individuals, as well as groups, can have one or more distinct security rights and system administrators can have universal rights and privileges or assign such rights to other designated and duly authorized users.

Administrators can set up password time-out frames at the individual user level. If the password time-out is blank, the system will set it up to a default of 90 days.

### 3.8.3 Single Sign-On

For SaaS customers in the Azure environment, Accela offers a single sign-on service (SSO) that makes it easy to integrate our back-office solutions with third-party identify providers Okta or Azure Active Directory.

SSO provides control of user accounts that can authenticate to the Accela back-office system using Microsoft Azure Active Directory and Okta. City users follow the Accela login web link, the system redirects them to the IDP login to authenticate the user, which then redirects the authenticated user to the Accela dashboard fully logged in without any additional authentication steps.

The Accela single sign-on adapter for Microsoft Azure Active Directory is built into our solutions and leverages Active Directory Services / or SAML V2 as the authentication API.

## 3.9 Application Software Functionality Requirements

Please complete the Software Features, Functions, and Capabilities Listing contained in the electronic file provided with the RFP Section 5 (Appendix A).

The proposed software should demonstrate an online, integrated method of processing the noted application modules and allow for immediate updates of all information. Access to information in either summary or detail should be obtained easily and intuitively. The proposed software's data entry screens should be designed to facilitate rapid data entry.

For each application software module proposed, indicate whether your organization developed the module or if the module is available because of a third-party relationship that has been established with another vendor.

In addition to the required and optional software information requested in Section 5, provide general information on other application modules not requested in this RFP that may be of interest or benefit to the City.

We have provided Appendix A, Software Features, Functions, and Capabilities Listing in Section 5, Appendix, as well as a separate attachment.

## 3.10 Software Upgrades

Please describe your software versioning and update policies/practices. Include, at a minimum, how often you issue upgrades (new versions) and whether new versions are provided as part of your annual maintenance and support fees. Please explain the process of installing update patches and service packs. Please provide costs related to the following upgrade items.

### Frequency

Accela provides a major software release twice per year. We apply service packs each month with usability enhancements and new capabilities, as well as to correct identified problems with a software program or maintenance on operating systems that require immediate action or updates. These major releases include enhancements to the Civic Platform, Citizen Access, GIS, Mobile, and our pre-configured Civic Applications.

All upgrades are included as part of the ongoing yearly subscription cost.



## Provision of release notes

All version releases and service packs are provided with corresponding instructions to enable a complete understanding of the reasons and outcomes. Detailed product release notes accompany all product releases, and are alternatively available on Accela's Success Community website for customers to review before installation. In addition, the following technical documentation is provided with each major release: Administrator Guide, User Guide, Installation and Configuration Guide, Online Help, and Interface Software Development Kit.

## Steps to perform an upgrade

For SaaS customers, Accela manages the upgrade process. We recommend the City review the corresponding release notes and third-party software versions to ensure compatibility with the upcoming Accela release (browsers, local ArcGIS Server, ePayment providers, etc.). Release windows are typically four to six hours on Tuesdays or Thursday nights once a month, with minimal downtime.

## Release to SaaS Clients

For major versions, Accela upgrades our SaaS Staging environment four to six weeks before the customer SaaS Production and non-production environments are upgraded to the same release version. (For minor releases, we upgrade the SaaS Staging environment one week ahead of the Production and non-production environments update.) This gives our clients time to certify, train, perform integration testing, and elect any new features that will require specific configurations before the release is installed into the Production environment. Accela completes upgrades for our clients. Our customers perform all testing and verification of the new release against their specific configuration and setup in the Staging environment.

**Exhibit 12: Software Upgrades**

Upgrade Types	Typical Frequency (in months)	Typical Vendor Assistance Cost		Typical Vendor End-User Training	
		Low Cost	High Cost	Low Cost	High Cost
<b>Version Upgrades</b>	Biannually / Every 6 Months	Upgrades are included in the annual SaaS subscription.		Release notes and technical documentation are provided as part of the annual SaaS subscription.	
<b>Major Upgrades</b>	N/A	Upgrades are included in the annual SaaS subscription.		Release notes and technical documentation are provided as part of the annual SaaS subscription.	
<b>Minor Upgrades</b>	Monthly	Upgrades are included in the annual SaaS subscription.		Release notes and technical documentation are provided as part of the annual SaaS subscription.	



### 3.11 User-Access Requirements by Module

The following table lists the City's estimated number of Full and Inquiry user-access requirements by module.

**NOTE:** These are not separate user IDs. Most of these are duplicate users because users may work in multiple modules. This information is intended to give the vendor an understanding of the number of users involved in implementation and/or training at each module level. For overall total user counts, please see "User Information" under section "Volumes and Conversions".

Module	Full Access	Inquiry Access	Total
<b>Land Management</b>			
Planning Projects	110	50	151
Permitting	110	50	160
Inspections	94	66	160
Business Licensing	45	115	160
Code Enforcement	56	104	160
Mobile Inspections and Code Enforcement Solutions	94	0	94
Parcel Address/Management	160	0	160

We have reviewed the user capacity outlined in the above table. Accela software pricing is based on a unique user ID metric. Our pricing is based on 160 users as outlined in the above table however – it is our view that the City would likely need less than 160 users. Pricing is included in work book – Tab G 2.

### 3.12 Hosted/SaaS Model

If your solution can only be deployed in an on-premise environment, complete "Appendix G1 – On-Premise Project Costs." If your solution can only be deployed as a Hosted/SaaS environment, complete "Appendix G2 – Cloud/Hosted Project Costs." NOTE: Both appendices G1 and G2 must be completed if the solution can be deployed as both hosted and on-premise.

We have provided Appendix G2 – Cloud/Hosted Project Costs in Section 5, Appendix, as well as a separate attachment.

With Accela's SaaS offering, the City can embrace efficiency, security, and scalability, all while cutting costs and optimizing your technology investments. Focus on serving your community, and let Accela take care of the rest.







**Exhibit 13: Increase time to value with ready-made solutions that respond to the rapid modernization of technology.**

### Accelerate Efficiency and Reduce Costs with Accela's SaaS Offering

Choose Accela's Software-as-a-Service (SaaS) delivery model to significantly reduce infrastructure costs and free up your IT staff from the burden of hardware and software maintenance. Accela expertly manages our applications and infrastructures within the industry-leading Microsoft Azure hosting environment, ensuring world-class data security and a robust and reliable solution with a 99.9 percent uptime commitment each calendar month. Embrace SaaS innovations and focus on innovation, while we handle the rest.

### Join the Momentum of SaaS Adoption

Joining the cloud revolution is a key reason jurisdictions are adopting a cloud environment to cut capital and maintenance costs. Accela's elastic and scalable cloud offers the ideal solution. With seamless integration capabilities and unparalleled reliability, our SaaS solution ensures continuous access to fully functional web-based applications while preserving ownership of your data. Benefit from a 99.9 percent uptime SLA, rigorous security standards, real-time monitoring, and advance notice of planned maintenance performed during off-business hours.

### Efficiency and Cost-Effectiveness

Accela's SaaS model provides a reliable and cost-effective solution for your mission-critical business needs, with predictable costs over time and reduced upfront investment. Say goodbye to additional hardware investments, as we handle all server infrastructure and application patches/upgrades. Implementations are expedited as our established infrastructure is at your service.

## Robust Data Security with Microsoft Azure

Rest assured with our robust data security measures, including 24/7/365 onsite security, multi-factor authentication, ongoing vulnerability scans, adherence to data encryption standards, redundant middle-tier application servers, and annual, thorough penetration testing. Accela's partnership with Microsoft Azure ensures world-class data hosting and security.



**Exhibit 14: Accela and Microsoft Azure – better together**

## Scalable and Expert Support

Benefit from load-balanced web services to meet user demands, multiple environments for testing, and scalable resources tailored to your needs. Reduce your IT labor with Accela handling server OS and application patches/upgrades. Our dedicated Customer Support team members are experts in Accela's solutions, ensuring a seamless experience for your organization.

### 3.13 Hardware Requirements

Please provide all hardware specifications, including servers, workstations, and other equipment. Include estimated costs (if applicable) in **Section 5 (Appendices G-1 and G-2)**.

We have provided Appendices G-1 and G-2 in Section 5, Appendix, as well as a separate attachment.

### 3.14 Integration/Interface Capabilities

The City is expecting to expand its integration and interfaces with key systems. Please describe any current capabilities, partnerships, or future considerations for the following types of applications/systems. See Appendix H.

The Civic Platform can be extended easily through solutions that are built on the Accela Civic Platform Customization framework as well as custom applications/interfaces built on the Construct APIs. This proposal includes turn-key and custom-developed integrations.

In regards to electronic plan submittals, the ePermitHub Digital Plan Room provides a single platform solution with the Accela Civic Platform. The integration goes beyond a traditional system interface as it is deeply embedded within the Civic Platform creating a seamless user and customer experience in both the back office and the citizen portal and enabling system administrators to streamline support operations. The ePermitHub Digital Plan Room provides accurate and efficient submittal management through robust self-service digital signature validation checks, file validation to ensure documents submitted are usable, automated sheet versioning enabling digital slip sheeting for re-submittals, and document requirements checklists to enhance the quality of customer submissions.

We have provided Appendix H in Section 5, Appendix, as well as a separate attachment.

### 3.15 Cost Considerations

The proposal should include all costs associated with training, implementation, hardware specifications, interface estimates, file conversion assistance, custom modification estimates, annual maintenance, and support.

Initial one-time costs for hardware (if applicable), implementation, training, software licensing, travel, and related costs, etc., must be included with the price proposal. See *electronic price proposal form Section 5 (Appendices G1 and G2)*.

Recurring annual costs should be described in the proposal, clearly stating what is included (e.g., application upgrades, state and/or federal reporting requirements, hours of support, etc.) in **Section 5 (Appendices G1, G2, and H)**.

The objective of all vendors responding to this RFP is to provide all necessary pricing **without any hidden or unexpected costs**.

Accela and Gray Quarter have provided Appendices G1, G2 and H in Section 5, Appendix, as well as a separate attachment.

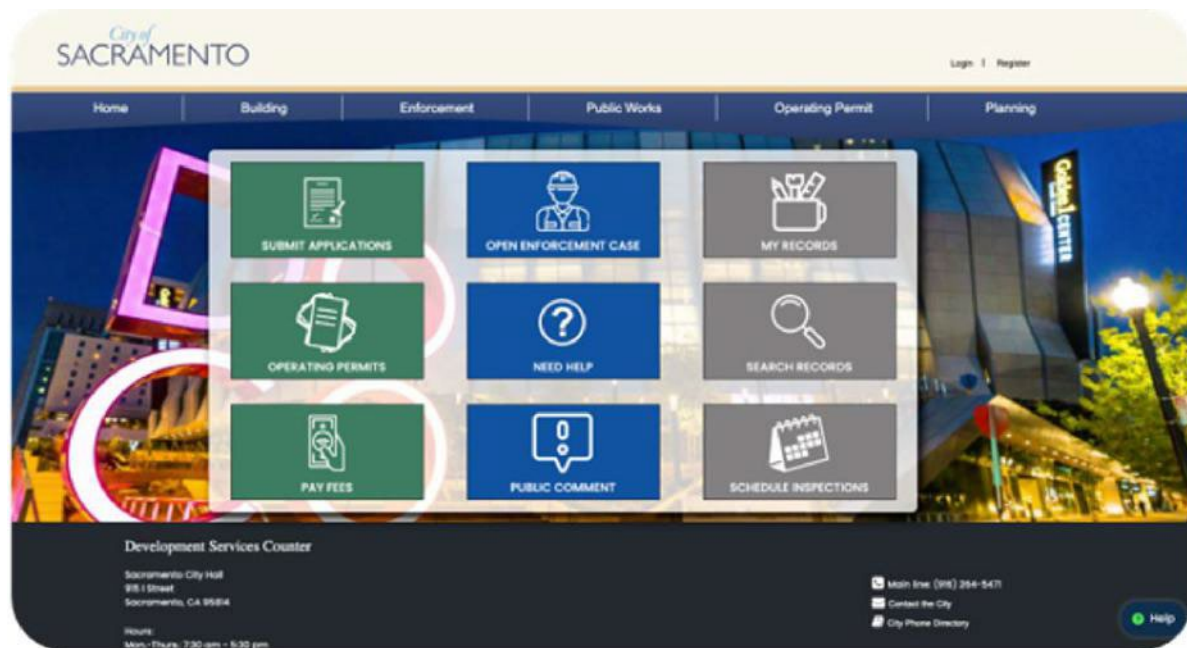
Our price is based on the scope, approach, resource estimates, deliverables, and assumptions defined in this response to the City's RFP. If the City removes scope or makes changes to component pricing, we shall review those elements to determine appropriate adjustments to the estimates provided in this response.

As the detailed project design progresses, we will work with the City to further define and estimate any customizations/extensions and other custom-coded components as well as prioritize work in these areas. Any resulting scope changes will be managed through the established change control procedure for the project.

Our annual SaaS price includes the Accela Civic Applications, as well as Mobile, GIS, and Accela Citizen Access.

Additional recurring costs are broken out as follows:

- Recurring Annual Maintenance/Support – Interfaces:
  - ☐ Customer Internet Payments: Offered as a payment adapter integration with an annual subscription inclusive of maintenance
  - ☐ Electronic Plan Submittal – ePermitHub software is represented here and described above
  - ☐ Inspections – Gray Quarter Rapid Scheduler will create a seamless interface between citizens and the ease of scheduling an inspection
  - ☐ Electronic Content Management System – Gray Quarter Laserfiche Management is a standard interface that is subscription-based
  - ☐ Electronic Signature – Gray Quarter eSignature integrates the City's DocuSign license with Accela's solution to create a seamless user experience
- Citizen Portal Annual Maintenance
  - ☐ Gray Quarter Wizard is a permitting wizard with a decision tree architecture that routes the citizen to the correct destination based on a series of filtering questions around permitting and licensing needs



**Exhibit 8: Gray Quarter Wizard deployment on Citizen Access Portal to enhance first impression optics with Citizens of the City**

Our best-in-class Implementation Methodology focuses on a build-it-once strategy centered around long-term sustainability and supportability. The one-time cost of \$2,378,400 completes all requirements as written. An opportunity exists in downstream conversations to leverage engineering efficiencies and standardization where appropriate to maximize cost mechanics.

### 3.16 Mobile Field Computing

Please describe your solution's mobile field computing options, including full application access through wireless VPN connectivity (i.e., no vendor software required), mobile field application for use with laptops, or mobile field applications with use of tablets (e.g., iPads, Surface, etc.)

Accela offers mobile capabilities for iOS, Windows, and Android-based mobile devices to bring processing to the field through our cloud-based solutions. With Accela Mobile, City field personnel perform inspections and investigations using their mobile device. This includes the following:

- Resulting inspections
- Capturing evidence by attaching photos and videos
- Inserting comments using comment controls that allow ad hoc, as well as standard, favorite, and recent comments
- Using extensive checklist functionality to add comments or documents, fill out custom fields or tables, and score and result inspections
- Creating, rescheduling, and reassigning inspections
- Creating records to log new violations and other violations
- Viewing and updating record and inspection conditions
- Viewing jobs on a map and navigating to a job location
- Communicating with record contacts via email, phone, and text and the ability to edit contact information or add new contacts

#### Job List

The job list displays inspections and records based on data filters that can be customized to show the user what is most relevant based on the needs of their role. Users can drill into specific items from the job list to view details and make updates. Items in the job list can be ordered based on various parameters or manually set in the desired order by the user.

- Job lists can be configurable for the solution, department, user group, or user
- Allow users to quickly filter jobs by many different types of criteria, including inspections for the week, annual inspections coming up, today's complaints, or by status or severity
- Users can switch between filters throughout the day as their needs change. For instance, if one inspector finishes assigned work for the day, he or she can switch filters and help other team members finish their inspections.



## Inspections

With Accela Mobile, users can complete inspections on their device. Building, fire, health, and civic code enforcement inspections can be scheduled, and rescheduled, resulted from Accela Mobile. Checklists can be used to allow the user to perform a step-by-step assessment of the codes and regulations established by government agencies. Inspections can be accessed from the Job List, as well as from search results or from the record or permit with which the inspection is associated.

## Records

Accela Mobile allows users to create and update Records in the field from their mobile device. Records can be created by selecting a location from the map or manually entering an address. New and existing records can also be updated from the app, including the following:

- Adding document attachments, such as photos and video
- Adding or updating record contacts
- Updating agency-specific record information in custom forms or tables
- Viewing and updating record conditions
- Viewing fees and payments associated with a record
- Updating costs and parts associated with work orders
- Viewing related records and setting relationships between records
- Updating workflow tasks associated with a record

## Work Offline

Accela Mobile lets you work with records and inspections in offline mode, allowing you to download job lists, records, documents, contacts, forms, tables, and workflows to your device for use offline in the field. If a data connection is not available when updating an inspection, the app will queue updates to be sent later when you initiate a sync.

## GIS

Accela Mobile lets field staff use Accela GIS to search for records on a specific property within a community or neighborhood. Users can also take advantage of the following capabilities:

- Select which map layers are displayed to show zoning, parcel, and other information relevant to a specific task
- Navigate from one inspection or record location to the next using the current location and driving directions
- Edit and update assets
- View proposed locations on a property for specific applications, such as burn permits or septic tanks





### 3.17 Telephone and Other Support

Please describe all support services available from your company in **Section 5 (Appendix B)**. Specifically, address the following issues:

#### • Normal hours of availability

Accela's Customer Support Department, a live technical support facility, is available in English to identified Authorized Customer Contacts from 4 a.m. until 6 p.m. Pacific Standard Time Monday through Friday, excluding Accela's observed holidays.

We provide one or more email addresses to which a customer may submit routine or non-critical support requests 24 hours a day, which Accela will address during our regular business hours.

#### • Website support information

We provide a 24x7 online support portal. To submit cases, log in to <https://success.accela.com>, navigate to "Submit a case," and click "Submit."

Our online, searchable knowledge base is available 24/7 and provides information on our supported products and solutions. We likewise host a robust online community that is supported by our customers, partners, and Accela personnel.

#### • Online chat

Accela uses an online ticketing support experience.

Ticketing Support: Accela will provide access to a ticketing system, which will be available twenty-four (24) hours per day, seven (7) days per week. A qualified support specialist shall use commercially reasonable efforts to answer questions and resolve problems regarding the Subscription Service from 4 a.m. until 6 p.m. Pacific Standard Time, Monday through Friday, excluding Accela's observed holidays.

#### • Remote system access capabilities

We provide remote assistance via a mutually acceptable remote communication method when required to resolve a maintenance request properly.

#### • Access via toll-free 800 number

We'll provide designated City contacts with a toll-free number.

#### • Costs

As per our standard agreement, Accela's yearly subscription includes Standard Support.

#### • Quality assurance program(s)

Accela's Product Management team is constantly monitoring and analyzing both the product and processes used to support that product. As we find any inefficiencies or areas for improvement in the processes we leverage, we fold those improvements into our process improvement sprints. Process improvement sprints run in parallel to our product development sprints and as we roll out improvements, we can leverage those in the next available cycle.

#### • Other support services

California Accela online user group: Today we have over 350+ Accela super users who connect daily on all things Accela, permitting, and process. Agencies leverage this online community to ask questions, collaborate on problems, and drive project results.

#### • Service-Level Agreements (SLA) – Response time (by priority or severity levels), escalation processes, and other metrics

The Customer Support team receives incident reports and tracks them until they are resolved. A Customer Support representative is assigned to each incident and communicates its progress at critical milestones using our incident tracking system. We use a standardized incident handling process for all customer incident reports. The incident handling process includes the following:

- A customer's Authorized Support Contacts report incidents to Accela Customer Support by phone, email, or Accela's online Customer Success portal.
- All reported incidents are recorded in Accela's incident tracking system.
- Customers receive an email notifying them of the associated case number.
- Incident severity is assigned to the case based on the definitions in the table in Exhibit 2.

The incident handling and escalation process follows this path:

- **Initiation:** Information provided to Accela Customer Support is entered into Accela's tracking system. The incident is given an identification number and assigned to a Customer Support Representative.
  - ☐ **For Requests for Information:** The Customer Support representative provides the requested information and closes the incident.
  - ☐ **For Usage Questions:** The Customer Support representative explains to the customer how to accomplish the task in question. The incident is then closed.
  - ☐ **For Software Issues:** After confirming that the issue is not related to usage, the Customer Support representative performs an issue analysis to determine the cause of the incident.

- **For Enhancements:** The Customer Support representative gathers information about the requested enhancement. If the issue is confirmed as an enhancement, the customer is advised to create an IDEA on Accela's Customer Success Community. The incident is then closed.
- **For Service Requests:** The Customer Support representative communicates and escalates the request to the appropriate Accela Account Executive.
- **Analysis:** Once a software issue is reported, the Customer Support representative attempts to replicate, analyze, research, and diagnose the cause of the issue. The customer may be asked to provide additional information, screenshots, or files to demonstrate the issue.
- **Escalation:** If the Customer Support representative cannot resolve the issue, it is escalated and additional resources are engaged to help resolve the issue.
  - **Escalation to Sales:** Incidents are escalated to our Sales team when custom services are requested. The Sales representative coordinates with the relevant team to determine feasibility and prepare a cost estimate for the requested service. These teams may include Accela's Services team or Accela's Partners. Upon customer approval, a purchase order is generated and the appropriate team provides the requested enhancement or service.
  - **Escalation to Product and Engineering:** Escalation to Accela's Product and Engineering teams occurs when a modification to the existing ecosystem is required. After an initial evaluation, the Product and Engineering Teams provide an estimated completion date. Our Quality Assurance staff evaluates each service pack or workaround before it is deployed to the Customer.
- **Resolution:** Once a solution is identified, and before closing the incident, the customer is asked to review and test the proposed solution. Resolved incidents are then closed.

## Client Testing / Acceptance

Resolution times vary. Resolutions can take many forms: a workaround, code update, user training, or other solutions. If a workaround is provided, Customer Support documents the workaround in the support case and works to provide assistance or clarification as needed. Once resolved, the incident is closed; otherwise, the incident is escalated to Accela's Product and Engineering teams.

Customer Support strives to confirm that a solution meets a customer's needs before closing a case. Once a case is closed, customers can complete a survey to rate their satisfaction with the service they received. All surveys are reviewed by Customer Support management. Once a solution is confirmed to fix the problem, it is closed and no longer tracked by Customer Support. Customer Support can reopen a closed incident if the issue needs further attention.

## Incident Severity, Response, and Resolution

As incidents are reported to the Customer Support team, incident severity is assessed and assigned based on the criteria in Exhibit 16. Reported incidents are triaged based on their impact on business operations and the severity of other reported issues. Resources are assigned to issues based on their severity.

**Exhibit 15: Error Classification Definitions**

Severity Level	Description
Level 1	Supported Product is non-functional or seriously affected and there is no reasonable workaround available (e.g. business is halted).



Severity Level	Description
Level 2	Supported Product is affected and there is no workaround available or the workaround is impractical (e.g. Supported Product response is very slow, and day-to-day operations continue but are impacted by the workaround).
Level 3	Supported Product is non-functional; however, a convenient workaround exists (e.g. non-critical feature is unavailable or requires additional user intervention).
Level 4	Supported Product works, but there is a minor problem (e.g. incorrect label, or cosmetic defect).

We use commercially reasonable efforts to respond to each case within the applicable response time described in Exhibit 17.

**Exhibit 16: Target Initial Response Time by Case Severity**

Severity Level	Target Initial Response Time*
1	1 day
2	3 days
3	5 days
4	7 days

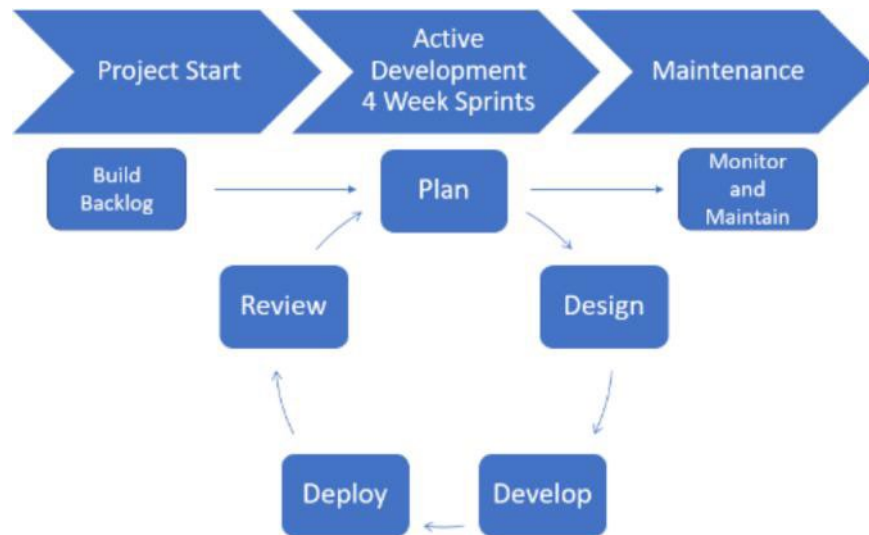
*\*Initial response times include M-F, 4 a.m. to 6 p.m. PT, excluding weekends and holidays. Severity Level 1 and 2 cases must be submitted via telephone as described above. Severity Level 1 and 2 target initial response times do not apply to cases submitted via email or electronically via the Accela Success Community.*



### 3.18 Implementation Methodology

Please describe your implementation methodology with milestones and timeframe. **Include a preliminary implementation schedule** for all applications, including the required time for system and application training, program testing, and conversion. Please include how you expect to sequence the installation of the various applications or application groupings.

**Agile Methodology-Driven:** Gray Quarter employs an agile methodology with Implementation. They assign a project manager to lead the effort and the combined project team. The project manager will be assigned for the duration of the project and will manage the Gray Quarter resources to adequately address sprint needs and issues, minimizing project staffing changes, and optimizing skill sets.



**Exhibit 17: Gray Quarter Implementation Methodology**

**Build The Backlog:** They collect information on your requirements during a Sprint 0 initiative, where they work with your team to identify and document individual work items into the backlog. During Sprint 0, they will be working to understand more details about your requirements. Gray Quarter aims to build collaborative relationships with your agency's subject matter experts.

**Development Sprints:** Once the backlog has been built, they work with City resources to prioritize the backlog into 4-week development sprints.

**Monitor and Maintain:** At the end of the sprint, any completed epics or features ready for release could potentially be released into the production environment and transitioned to support. They can support phased go-live strategies and sequence according to City business use case priority or one go-live.





	Month 1	Month 2	Month 3	Month 4
Typical Sprint Activities	Sprint Planning (Kick-Off, Backlog Grooming, etc.)	Configuration and Development	Configuration and Development	Refactoring / UAT / Release
	Configuration and Development	Mid-Sprint Demonstration Gather Feedback	Product Backlog Refinement	Sprint Review Retro-spective Training

**Exhibit 18: Typical Sprint Activities**

\*For illustrative purposes only

**Project Milestone Description:** The below are the most common project milestones where Gray Quarter will partner with the City Project Management Office to determine cadence, stakeholder approval, and iterative governance structure.

- **Project Initiation:** This milestone involves forming the project team, defining project goals, and establishing the initial product backlog. The product backlog contains a prioritized list of features, user stories, and requirements.
- **Sprint Planning:** At the beginning of each sprint, the team holds a planning meeting to select user stories from the product backlog and determine the work to be done during the sprint. The team estimates the effort required for each user story and creates a sprint backlog.
- **Sprint Execution:** This milestone encompasses the development activities within each sprint. The team works on the selected user stories, focusing on delivering a potentially shippable increment of the software at the end of the sprint. Daily stand-up meetings are conducted to discuss progress, address challenges, and plan the work for the day.
- **Sprint Review:** At the end of each sprint, a review meeting is held to demonstrate the completed functionality to stakeholders. The team gathers feedback, identifies areas for improvement, and updates the product backlog based on the feedback received.
- **Sprint Retrospective:** Following the sprint review, the team holds a retrospective meeting to reflect on the sprint process and identify opportunities for improvement. Lessons learned from the sprint are discussed, and actions are defined to enhance future sprints.
- **Release Planning:** This milestone involves planning the release of a software increment to the production environment. The team considers the prioritized backlog items, evaluates their readiness, and determines the scope of the next release based on stakeholder priorities and project constraints.



- **User Acceptance Testing:** During this milestone, the software increment is tested by end-users or user representatives to ensure it meets the required functionality and user needs. Feedback from user acceptance testing is collected and used to refine the product backlog.
- **Iterative Development and Releases:** Agile projects typically involve multiple iterations or sprints, where the team iteratively develops and releases software increments. Each sprint follows a similar pattern of planning, execution, review, and retrospective until the project goals are achieved.
- **Continuous Integration and Delivery:** Agile projects often emphasize continuous integration and delivery practices, where software changes are frequently integrated, tested, and deployed to the production environment. This milestone ensures that the software is continually available and adaptable to evolving user needs.

Task Name	Duration	Start	Finish	Task Name	Duration	Start	Finish
<b>Project Schedule</b>	<b>521 days</b>	<b>Mon 11/27/23</b>	<b>Mon 11/24/25</b>	<b>Stage 3 - Solution Foundation Complete</b>	<b>0 days</b>	<b>Tue 12/31/24</b>	<b>Tue 12/31/24</b>
Stage 1 - Initiation	26 days	Mon 11/27/23	Mon 1/1/24	Stage 4 - Build	107 days	Wed 1/1/25	Thu 5/29/25
Project Initiation	26 days	Mon 11/27/23	Mon 1/1/24	Conversion	66 days	Wed 1/1/25	Wed 4/2/25
Conduct Internal SOW Review	2 days	Mon 11/27/23	Tue 11/28/23	Historic Data Source 1 Conversion Analysis	29 days	Wed 1/1/25	Mon 2/10/25
Setup Project Internal Tasks	2 days	Wed 11/29/23	Thu 11/30/23	Historic Data Source 2 Conversion Analysis	29 days	Tue 1/14/25	Fri 2/21/25
Build Project Teamsite	3 days	Wed 11/29/23	Fri 12/1/23	Source 1 Data Conversion Execution	28 days	Mon 2/24/25	Wed 4/2/25
Review Project Teamsite	1 day	Mon 12/4/23	Mon 12/4/23	Historic Data Source 2 Conversion Execution	28 days	Mon 2/24/25	Wed 4/2/25
Create Project Charter (including Communication Plan, Risk & Issue Mgmt. Plan)	20 days	Wed 11/29/23	Tue 12/26/23	Interfaces	41 days	Wed 1/1/25	Wed 2/26/25
Finalize Project Plan	15 days	Wed 11/29/23	Tue 12/19/23	Interface Analysis	21 days	Wed 1/1/25	Wed 1/29/25
Build Kickoff Presentation	2 days	Fri 12/15/23	Mon 12/18/23	Interface Development	20 days	Thu 1/30/25	Wed 2/26/25
Conduct Project Initiation/Kickoff Meeting (On-site)	0.5 days	Thu 12/21/23	Thu 12/21/23	Reports	89 days	Wed 1/1/25	Mon 5/5/25
Core Team Product Orientation (On-site)	0.5 days	Thu 12/21/23	Thu 12/21/23	Reports - Prioritize and define complexity	10 days	Wed 1/1/25	Tue 1/14/25
High Level Technical Consultation	5 days	Tue 12/26/23	Mon 1/1/24	Report Specifications	34 days	Wed 1/15/25	Mon 3/3/25
Stage 1 - Initiation Complete	0 days	Mon 1/1/24	Mon 1/1/24	Report Development	45 days	Tue 3/4/25	Mon 5/5/25
Stage 2 - To Be Analysis	54 days	Tue 1/2/24	Fri 3/15/24	Business Process Validation and Automation (BPVA)	25 days	Wed 1/15/25	Tue 2/18/25
To-Be Analysis Design & Documentation	54 days	Tue 1/2/24	Fri 3/15/24	BPVA Inventory - Define and Prioritize	1 day	Wed 1/15/25	Wed 1/15/25
To-Be Analysis (Back-Office/Public Portal) Sessions	29 days	Tue 1/2/24	Fri 2/9/24	BPVA Specifications	15 days	Thu 1/16/25	Wed 2/5/25
To-Be Analysis (Back-Office/Public Portal) Documentation	30 days	Mon 2/5/24	Fri 3/15/24	BPVA Development	11 days	Tue 2/4/25	Tue 2/18/25
Stage 2 - To-Be Analysis Complete	0 days	Fri 3/15/24	Fri 3/15/24	Public Portal Configuration	5 days	Thu 5/22/25	Wed 5/28/25
Stage 3 - Solution Foundation Configuration	210 days	Wed 3/13/24	Tue 12/31/24	Back- Office User Experience Optimization	5 days	Fri 5/23/25	Thu 5/29/25
Back-Office/Public Portal Configuration	90 days	Wed 3/13/24	Tue 7/16/24	Stage 4 - Build Complete	0 days	Thu 5/29/25	Thu 5/29/25
Back-Office/Public Portal Configuration Review	30 days	Wed 7/10/24	Tue 8/20/24	Stage 5 - Readiness	42 days	Fri 5/30/25	Mon 7/28/25
Back-Office/Public Portal Configuration Updates	90 days	Wed 8/21/24	Tue 12/24/24	System & User Acceptance Testing	30 days	Fri 5/30/25	Thu 7/10/25
Back-Office/Public Portal Configuration Review & Sign-Off	5 days	Wed 12/25/24	Tue 12/31/24	Ad-Hoc Query Training	1 day	Fri 7/11/25	Fri 7/11/25
				Train the Trainer Training	3 days	Fri 7/11/25	Tue 7/15/25

**Exhibit 19: Sample Project Schedule**

## 3.19 Conversion Costs

The City anticipates electronic data conversions, depending on cost. Please include an estimated range of costs for data conversions for each application, if available, and a description of data that would be typically converted. Costs for proposed data conversion are to be included **(Section 5, Appendix I)**.

Gray Quarter will mutually agree with the City on what records to convert. The development of all Civic Platform data conversion/migration programs requires that the City provide properly formatted and cleansed source data in an MS-SQL database.

With the assistance of the City, data will be mapped and converted utilizing Accela's Extract, Translate, and Load ("ETL") toolset. This will assist to ensure the accuracy of the mapping. The data mapping tool ensures that the legacy source to Accela solution is accurate and prevents data from failing to convert, while the execution tool can be used to consistently run the conversion process and track statistics.

Historical/Legacy data conversion includes the conversion of attached documents into Accela Document Services ("ADS") in Accela or the Document Management system chosen by the City, provided the City provides the documents in the structure Accela requires. The documents will be converted to the configured primary electronic document management system (EDMS).

Gray Quarter will perform the following activities to complete the data conversion of all legacy data:

- Work with City technical staff and subject matter experts to map the legacy data fields to Accela core fields and custom fields or custom lists.
- Review required data conversion documentation to ensure proper data field mapping to have complete accurate data conversion mappings.
- Develop and test the data conversion/migration programs to load/migrate data from the in-scope data sources into the Accela Civic Platform application.
- Validate that the mapping of converted/migrated data into the Civic Platform meets the specification.

The team will evaluate each data source to determine if the Accela conversion tools are best suited to convert the data source or if the standard Accela APIs can be leveraged to convert the data source.

### Considerations for API Conversions

- Suited well for smaller record counts (less than 5,000 records).
- Leverages JSON object to import data.
- The API will validate business logic (Application submit after, Workflow submit after, etc.) and allow the converted data to mimic more of how it would be handled when entered by hand.

## 3.20 Training and Education

Please describe your consulting and training options, including classroom (on-site and off-site), online (group and self-paced), training videos, and manuals. Include training for all required staff and users. Include ongoing training and user support group training options. Please refer to Appendices G1 and G2 to provide the pricing for this service.

Training Plan for Licensing and Permitting Software at Gray Quarter.

### 1. Assessment of Training Needs:

- Identify the target audience: Determine the specific teams or individuals who will be using the licensing and permitting software.
- Assess the current skill levels: Understand the existing knowledge and skills of the users regarding software usage and related processes.

### 2. Define Training Objectives:

- Clearly outline the goals and objectives of the training program.
- Align objectives with the City's overall strategy and the specific benefits expected from using the software.

### 3. Training Content:

- Deliver standard training materials, including manuals, guides, and multimedia resources.
- Discuss and review how the content covers all aspects of licensing and permitting processes for the City.

#### **4. Training Delivery Methods:**

- Choose appropriate training methods based on the nature of the content and the learning preferences of the participants.
- Options include in-person workshops, online courses, video tutorials, and hands-on exercises.

#### **5. Training Schedule:**

- Develop a training schedule that accommodates the availability of participants.
- Consider providing both initial training sessions and ongoing refresher courses.

#### **6. Instructor Selection and Training:**

- If applicable, select qualified instructors with expertise in both the software and the specific licensing and permitting processes.
- Provide instructors with training on effective teaching methods and the unique aspects of the software

#### **7. Hands-on Training and Simulations:**

- Incorporate hands-on exercises and simulations to allow participants to practice using the software in a controlled environment.
- ⑩ The City will identify realistic scenarios that mimic the actual licensing and permitting workflows.

#### **8. Feedback Mechanism:**

- Establish a feedback system to gather input from participants regarding the training program.
- Use feedback to continuously improve the training content and delivery methods.

#### **9. Documentation and Knowledge Base:**

- Guide City on how to find comprehensive documentation and knowledge base for the software, including FAQs and troubleshooting guides.
- ⑩ Make these resources easily accessible to users for self-help.

#### **10. Assessment and Certification:**

- Implement assessments to evaluate participants' understanding of the software.
- Consider providing certifications for the successful completion of the training program.

#### **11. Ongoing Support:**

- Establish a system for ongoing support, including a helpdesk and regular updates to training materials.
- Ensure that users have access to resources to address any challenges they encounter post-training.

#### **12. Monitoring and Evaluation:**

- Regularly monitor the effectiveness of the training program through key performance indicators (KPIs).
- Evaluate the impact of the software on licensing and permitting processes within the City

#### **13. Continuous Improvement:**

- Use feedback, performance data, and evolving software features to continuously improve the training program.



By following these steps, Gray Quarter and the City can create a comprehensive and effective training plan for licensing and permitting software, ensuring that employees are well-equipped to leverage the software for efficient and compliant operations.

## 3.21 Project Management

The City will provide a designated project manager and expects the vendor to do the same. Please include recommended vendor project management costs (**Section 5, Appendices G1 and G2**) in the proposal and **describe, in detail, services to be provided**. The City reserves the right to accept or reject changes in vendor project management personnel.

Gray Quarter's Project Manager will provide a single point of contact for the City.

For this project, Gray Quarter will develop a Communication Management Plan with City stakeholders that provides directives on how critical project information is exchanged with the client, project team, and stakeholders. Project success depends on communicating the correct information to the appropriate stakeholders, using clear and relevant language that resonates with the audience from project initiation to post-deployment/close-out.

The Communication Management Plan document will provide a roadmap that will direct the project in the topics outlined below:

- Communication guidelines
- Project Manager responsibilities
- City management responsibilities
- Meeting and scheduling standards
- Progress report standards
- Status meeting schedule
- Oversight meeting schedule
- Communication types
- Status report
- Risk and issue report
- Walkthroughs on the progress of each workflow prototype when they are 30% and 60% complete
- Deployment report
- Retrospective report
- Weekly status update calls with City Technical Leads, Departmental Leads, and Business Process Leads

In addition, the Project Manager will facilitate and lead Executive Steering Committees monthly designed to be attended by City sponsors and decision-makers. Gray Quarter believes while risk cannot be exclusively eliminated, success is defined by establishing a risk mitigation charter, a clear understanding of communication guidelines, and open lines of communication between IT and the Business representatives of the City





### 3.22 Subcontractor and Third-Party Relationships

Please describe any subcontractor relationships and/or third-party providers that will be used for this implementation.

**NOTE:** If a vendor chooses to partner with a third-party vendor to address some requirements, this must be clearly stated in the response. Be specific when describing applications and the third-party vendor-solution provider. Third-party vendors will be required to demonstrate their portion of the application solution along with all other required information being provided by the prime vendor.

We propose Gray Quarter provide professional services for the City's project. We can offer the following contract flexibility.

- Option one: Two contracts. One with Accela Software, and one with Gray Quarter Services and Interface Technologies.
- Option two: A single contract. Gray Quarter can offer a single contract to the City (Services, Interfaces and Accela Software)

### 3.23 Customer Implementation Responsibilities

Please describe and/or provide a list of the typical customers' implementation responsibilities.

**City Resources:** The following assumptions have been made about the City's role/staffing as well as key third-party staff:

- The City will identify and assign a Project Manager, a Product Owner, and appropriate subject matter experts that will be a part of the Implementation team.
- The City's Implementation team will be expected to attend the daily standups and all other meetings conducted during the Sprint
- The City is responsible for any third-party relationships and assisting Gray Quarter and Accela in gathering any information needed from third parties such as API information or setting up meetings with their party representatives
- The hours will vary by role. Below is a list of roles and estimated levels of effort per week. The LOE will vary from week to week depending on the phase of the implementation

**Exhibit 20: City Project Resources**

Role	Responsibility	Estimated Hours Per Week
Project Sponsor	<ul style="list-style-type: none"> <li>• The final escalation point and executive support of the project</li> <li>• Ensure the best interests of the City are represented</li> <li>• Stay informed of major project decisions and activities</li> <li>• Assist with the escalation of critical issues</li> <li>• Ensure the City has adequate resources and time allocated to the project</li> </ul>	2

Role	Responsibility	Estimated Hours Per Week
<b>Project Manager</b>	<ul style="list-style-type: none"> <li>• Work closely with Accela Project Manager to manage, track, and facilitate all project activities including:</li> <li>• Planning, scheduling, and tracking activities</li> <li>• Ensure that tasks are completed on time per project schedule</li> <li>• Coordinate and ensure appropriate City resources are engaged as necessary</li> <li>• Overall coordination, communication, and status updates to Sponsor</li> </ul>	16
<b>Product Owner</b>	<ul style="list-style-type: none"> <li>• Represents the best interests of the City and makes all decisions related to product configuration/direction. They collaborate with the Implementation team and are responsible for maintaining the Product backlog of user stories, which is the total of the remaining work to be completed.</li> <li>• Explain the product backlog items, prioritize the work items, assign the user stories to the implementation team, and ensure that the product backlog is easily understandable and transparent.</li> <li>• Clearly define what is included and what the goal is for each Sprint.</li> <li>• Own and maintain the product backlog, adding, updating, and removing user stories as needed and ensuring fit within Sprint schedules.</li> </ul>	20-30
<b>Subject Matter Experts</b>	<ul style="list-style-type: none"> <li>• Work with the Product Owner to drive user stories to completion including defining requirements and acceptance criteria, unit and end-to-end testing, and approving assigned user story functionality each Sprint.</li> </ul>	5-20
<b>IT</b>	<ul style="list-style-type: none"> <li>• Assist as needed with on-premise software, 3rd party relationships, integration, and data migration analysis and testing.</li> </ul>	5-20

### 3.24 Sample User and Technical Manuals & Other Documentation

Please provide sample pages for the following:

- Sample Application User Manual
- Sample Application User Online Documentation
- Sample Technical User Manual
- Sample Technical User Online Documentation
- Sample Training Syllabus
- Sample Section of a Detailed Implementation Project Schedule

Included in your Civic Platform subscription is access to the Accela Success Community. Success Community is a public-facing portal that contains the robust Civic Platform User Guide (both the manual and online documentation) with all its contents as well as a public forum to ask questions on a variety of topics to Accela subject matter experts within the company and within its customer base. Exhibit 22 is an example of the Civic Platform User Guide Table of Contents:

## Civic Platform User Guide

- Civic Platform Access and Usage
- Records
- Record Relationships
- Maps in the Oxygen User Interface
- Maps in the 8.0 User Interface
- Accounting
- Activities
- Attachments
- Audit Logs
- Calendars
- Contacts
- Licensed Professionals
- Education and Examination Providers
- Electronic Document Review
- Enforcement
- Inspections
- Licenses
- Model Maintenance
- Property
- Random Audits
- Sets
- Structures and Establishments
- Time Accounting Tracker
- Assets
- Work Order Cost Distribution
- Asset Condition Assessments
- Part Inventory
- Preventative Maintenance Schedules
- Addresses
- Conditions
- Reports
- Ad Hoc Reports
- SmartCharts
- Workflows and Workflow Tasks
- Work Orders

### Exhibit 21: Sample Civic Platform User Guide Table of Contents

The Accela Success Community in conjunction with the Accela U learning system includes hundreds of forums, canned videos, best practices from Accela and other agencies, as well as the below example of a Power Administrator Guide.

## Civic Platform Administrator Guide

- [Getting Started](#)
- [Part 1: Configuring the User View](#)
- [Part 2: Setting Up Agencies, Organizations, and People](#)
- [Part 3: Configuring Agency Business Objects](#)
- [Part 4: Managing Agency Communications and Events](#)
- [Part 5: Automated Data Processing](#)
- [Part 6: Reporting and Analytics](#)
- [Part 7: Accounting](#)
- [Part 8: Land Management](#)
- [Part 9: Asset Management](#)
- [Part 10: Licensing](#)
- [Part 11: System Diagnostics](#)

### Exhibit 22: Sample Administrator Guide Table of Contents

Exhibit 24 is a sample Project Schedule. A complete project schedule will be jointly aligned as one of the initial steps of the project kickoff.

Task Name	Duration	Start	Finish	Task Name	Duration	Start	Finish
Project Schedule	521 days	Mon 11/27/23	Mon 11/24/25	Stage 3 - Solution Foundation Complete	0 days	Tue 12/31/24	Tue 12/31/24
Stage 1 - Initiation	26 days	Mon 11/27/23	Mon 1/1/24	Stage 4 - Build	107 days	Wed 1/1/25	Thu 5/29/25
Project Initiation	26 days	Mon 11/27/23	Mon 1/1/24	Conversion	66 days	Wed 1/1/25	Wed 4/2/25
Conduct Internal SOW Review	2 days	Mon 11/27/23	Tue 11/28/23	Historic Data Source 1 Conversion Analysis	29 days	Wed 1/1/25	Mon 2/10/25
Setup Project Internal Tasks	2 days	Wed 11/29/23	Thu 11/30/23	Historic Data Source 2 Conversion Analysis	29 days	Tue 1/14/25	Fri 2/21/25
Build Project Teamsite	3 days	Wed 11/29/23	Fri 12/1/23	Source 1 Data Conversion Execution	28 days	Mon 2/24/25	Wed 4/2/25
Review Project Teamsite	1 day	Mon 12/4/23	Mon 12/4/23	Historic Data Source 2 Conversion Execution	28 days	Mon 2/24/25	Wed 4/2/25
Create Project Charter (including Communication Plan, Risk & Issue Mgmt. Plan)	20 days	Wed 11/29/23	Tue 12/26/23	Interfaces	41 days	Wed 1/1/25	Wed 2/26/25
Finalize Project Plan	15 days	Wed 11/29/23	Tue 12/19/23	Interface Analysis	21 days	Wed 1/1/25	Wed 1/29/25
Build Kickoff Presentation	2 days	Fri 12/15/23	Mon 12/18/23	Interface Development	20 days	Thu 1/30/25	Wed 2/26/25
Conduct Project Initiation/Kickoff Meeting (On-site)	0.5 days	Thu 12/21/23	Thu 12/21/23	Reports	89 days	Wed 1/1/25	Mon 5/5/25
Core Team Product Orientation (On-site)	0.5 days	Thu 12/21/23	Thu 12/21/23	Reports - Prioritize and define complexity	10 days	Wed 1/1/25	Tue 1/14/25
High Level Technical Consultation	5 days	Tue 12/26/23	Mon 1/1/24	Report Specifications	34 days	Wed 1/15/25	Mon 3/3/25
Stage 1 - Initiation Complete	0 days	Mon 1/1/24	Mon 1/1/24	Report Development	45 days	Tue 3/4/25	Mon 5/5/25
Stage 2 - To Be Analysis	54 days	Tue 1/2/24	Fri 3/15/24	Business Process Validation and Automation (BPVA)	25 days	Wed 1/15/25	Tue 2/18/25
To-Be Analysis Design & Documentation	54 days	Tue 1/2/24	Fri 3/15/24	BPVA Inventory - Define and Prioritize	1 day	Wed 1/15/25	Wed 1/15/25
To-Be Analysis (Back-Office/Public Portal) Sessions	29 days	Tue 1/2/24	Fri 2/9/24	BPVA Specifications	15 days	Thu 1/16/25	Wed 2/5/25
To-Be Analysis (Back-Office/Public Portal) Documentation	30 days	Mon 2/5/24	Fri 3/15/24	BPVA Development	11 days	Tue 2/4/25	Tue 2/18/25
Stage 2 - To-Be Analysis Complete	0 days	Fri 3/15/24	Fri 3/15/24	Public Portal Configuration	5 days	Thu 5/22/25	Thu 5/28/25
Stage 3 - Solution Foundation Configuration	210 days	Wed 3/13/24	Tue 12/31/24	Back-Office User Experience Optimization	5 days	Fri 5/23/25	Thu 5/29/25
Back-Office/Public Portal Configuration	90 days	Wed 3/13/24	Tue 7/16/24	Stage 4 - Build Complete	0 days	Thu 5/29/25	Thu 5/29/25
Back-Office/Public Portal Configuration Review	30 days	Wed 7/10/24	Tue 8/20/24	Stage 5 - Readiness	42 days	Fri 5/30/25	Mon 7/28/25
Back-Office/Public Portal Configuration Updates	90 days	Wed 8/21/24	Tue 12/24/24	System & User Acceptance Testing	30 days	Fri 5/30/25	Thu 7/10/25
Back-Office/Public Portal Configuration Review & Sign-Off	5 days	Wed 12/25/24	Tue 12/31/24	Ad-Hoc Query Training	1 day	Fri 7/11/25	Fri 7/11/25
				Train the Trainor Training	3 days	Fri 7/11/25	Tue 7/15/25

Exhibit 23: Sample Project Schedule

### 3.25 Vendor/Reseller Information

Please provide all information related to your company as requested in RFP **Section 5 (Appendices)**. In addition, specifically address the following issues:

- Describe your research-and-development approach and process.
- If you are a software reseller/partner, please provide the same company, customer demographics, and reference information for your specific company, in addition to the software vendor's information (see **Section 5, Appendices B, C, D, and E**).
- If your proposed solution belongs to a parent/consolidation company, only provide customer base figures and references for the proposed solution (see **Section 5, Appendices D and E**).

We have provided our responses to Appendices B, C, D and E in RFP Section 5, Appendices, as well as a separate attachment.

### 3.26 Technology Direction

Please describe short-, medium-, and long-term directions regarding major changes in architecture, database, platforms, languages, etc.

Accela maintains a high-level product roadmap that provides strategic direction for all aspects of our solutions. The roadmap is shaped in large part by customer feedback, and priorities may shift over time to meet the demands of changing needs and regulatory environments. Due to this, the roadmap may change at any time at Accela's sole discretion, and we make no assurances as to if and when specific functionality will be provided beyond that which is available at the time of contract signing.

Accela provides customers with two major releases per year, one in the Spring and a second in the Fall. We also have service pack updates monthly. This frequency allows for continuous enhancements which often increase functionality, security, performance, and usability for customers as soon as possible.

Our updates generally include the following products:

- The Civic Platform
- Accela GIS
- Accela Mobile
- Accela Citizen Access
- Accela Insights
- Accela Civic Applications (pre-configured solutions)
- Also may impact our Construct APIs, forms design, and other aspects of the system

In recent releases, we have focused on important aspects such as:

- Ensuring customers get the most value out of their data with solutions such as Accela Insights and Enhanced Reporting Database



- Enabling agencies to offer citizens the most engaging and intuitive interfaces with Premium Citizen Experience
- Improved ways to configure and maintain the system with new admin tools such as Configuration Manager

Accela also enhances the functionality of our Civic Applications, with more pre-built, and domain-specific permit and license types, reports, workflows, forms, checklists, notifications, and other elements to shorten implementation time and effort.

Accela publishes its 18-month roadmap every six months and conducts customer webinars in those same intervals to share the updated roadmap and answer customer questions.

### 3.27 Vendor Financial Information

Short-listed vendors may be required to provide copies of your organization's last three (3) years of audited financial statements, including any pending litigation, in a confidential manner to the City. Please **do not** send financial statements with your proposal.

Accela has been a leader in the government software space for more than 40 years and enjoys long-standing relationships with approximately 600 clients around the globe. As a privately-held (non-publicly traded) corporation, and per our longstanding corporate policies, Accela does not make public disclosures of our financial records or general fiscal condition. Thus, we are unable to provide documented financial data to the City for this RFP.

However, Accela voluntarily submits to a confidential (not subject to any open records request) annual audit of its financial statements. Our most recent audit was performed by Grant Thornton, a premier accounting company, and they issued an unqualified opinion on Accela's audited financial statements.

Furthermore, Accela has the backing of strong capital partners recently closing a new strategic investment in 2023. Accela is owned by Francisco Partners, a global investment company with over 20 years of history investing in over 400 technology companies, and by Berkshire Partners, a private equity firm with a strong record of success over 30 years and over \$100 billion in total enterprise value.

Finally, though we are unable to provide the documented financial data in our response, upon execution of a non-disclosure agreement Accela's Chief Financial Officer is available to review audited financial information with the City staff members via a video conference call.

### 3.28 User Groups

Provide information regarding organized user groups, including frequency and location of user group meetings. Also, indicate who conducts the meetings and who is responsible for establishing meeting agendas. Please also describe a local (state or regional) user groups or meetings.

The Southern California Accela user group discusses products, and trends and shares experiences to improve the use of their Accela products. The user group connects online and in person, yearly. **The next in-person user group is in April 2024. We expect to have 150+ people across 50+ jurisdictions. It will be all user presentations.** This year, the main presentations will include online customer experience, analytics and reporting, virtual inspection, hiring talent in 2024, resource deployment, Artificial Intelligence (AI), and governance.



Most meetings and product updates are coordinated around new releases and provide the user group members with information about the release, product demonstrations, and product issues that have been addressed since the last release and new product enhancements based on feedback from the general user community. Accela posts all user group events on the Events section of the Accela website at <https://www.accela.com/events-list/>, and can also access additional customer forums and discussions in Accela's Success Community.



## NORCAL USER GROUP AGENDA

May 11, 2023 | 10 AM-2 PM

<p><b>9-9:45 AM</b> <b>Registration</b></p> <hr/> <p><b>10:05-10:20 AM</b> <b>Welcome and Introductions</b></p> <hr/> <p><b>10:20 AM-12 PM</b> <b>Morning Presentations</b></p> <hr/> <p><b>Automated Issuance of Solar Permits using SolarApp+ and ePermit Hub DPR</b> <i>City of Santa Rosa</i> <i>Jackie Reese</i></p> <p><b>ERD and Data Access in the Cloud</b> <i>City of Menlo Park</i> <i>Whit Loy</i></p> <p><b>Concord's Relationship with Accela Support Over the Years</b> <i>City of Concord</i> <i>Ling Tondian</i></p> <p><b>Enterprise Platform for Community Development and Environmental Health: Reducing Silos to Accelerate Services to Camp Fire Survivors</b> <i>Butte County</i> <i>Patrick Miner</i></p> <p><b>Streamlining the Accela Experience at Solano County</b> <i>Solano County</i> <i>Stewart Bruce</i></p> <p><b>Accelerate: Is it Worth the Misspelling?</b> <i>San Mateo County</i> <i>Elizabeth Kimmel</i></p>	<p><b>12-12:45 PM</b> <b>Lunch Break</b></p> <hr/> <p><b>12:45-1:55 PM</b> <b>Afternoon Presentations</b></p> <hr/> <p><b>Case Study for Cupertino's Journey to Build Out Accela Insights</b> <i>City of Cupertino</i> <i>Krishna Sastry</i></p> <p><b>Paradise Comes Back Strong with Accela Cloud Migration</b> <i>Town of Paradise</i> <i>Tony Lindsey</i></p> <p><b>Streamlined ADU Applications</b> <i>City of Oakland</i> <i>Annie He</i></p> <p><b>Ad Hoc Topics</b> <i>General</i></p> <hr/> <p><b>1:55-2 PM</b> <b>Closing Remarks</b></p>
--	---



Roundhouse Market & Conference Center, Tenaya Room

2600 Camino Ramon, San Ramon, CA 94583



**Exhibit 24: Example of Northern California User Group Presentations**

### 3.29 References and User Base

Please provide references for a minimum of ten (10) completed projects of similar scope and nature to the City, **preferably within the same region** and within the last three (3) years.

A reference worksheet is provided in **Section 5 (Appendix E)**.

Please provide the total number of customers (software provider and reseller, if applicable) for the applications according to the demographic request worksheet provided in **Section 5 (Appendix D)**.

If your proposed solution belongs to a parent/consolidation company, only provide customer base figures and references for the proposed solution (see **Section 5, Appendices D and E**).

Additionally, please provide an organization-name list of all active customers within the state of California. Contact information is not necessary.

Lastly, please provide the **number** of new customers (original go-lives) implementing the proposed applications in each of the last three (3) years.

We have provided our references and user base information in Appendices D and E in Section 5, Appendix, as well as a separate attachment.

While Accela does not provide client lists in a proposal, we would be happy to discuss them with the City during the evaluation.

Gray Quarter, Inc. has been involved with 68 Accela implementations in the last three years within the proposed Accela Land Management solution. Gray Quarter, Inc. has developed and refined the Implementation Methodology, Project Management, and City Resource needs described here as a result of this broad client exposure.

**Exhibit 25: Gray Quarter California Client List**

Client Name	Client Name	Client Name	Client Name
City and County of San Francisco	Sonoma County	City of Santa Clara	Santa Clara County
City of Oakland	Ventura County	City of Palo Alto	City of Santa Monica
City of Lancaster	City of Rancho Cucamonga	City of Ontario	Solano County
City of Santa Barbara	Santa Barbara County	CAL Fire	Kern County
City of Berkeley	City of Eastvale	City of Roseville	City of Moreno Valley



Client Name	Client Name	Client Name	Client Name
City of Santa Clarita	City of Jurupa Valley	City of Huntington Beach	City of Torrance
City of Stockton	Napa County	City of Los Angeles	State of CA
City of Perris	Menlo Park Fire District		



## 4 Detailed Proposal and Contractual Requirements

Accela welcomes the opportunity to discuss, in good faith, the governing contractual terms during the negotiations portion of this procurement process. Our negotiation approach is to seek a fair and balanced contractual arrangement reflecting an appropriate allocation of risk, duties, and responsibilities between the parties. Accela anticipates that any final contractual terms between the parties will incorporate key elements of Accela's terms and conditions to allow for the provision of high-quality performance by Accela.

Notwithstanding anything to the contrary in the solicitation documents: (1) Accela does not agree to any solicitation document standard terms without negotiation and/or all exceptions provided by Accela to be included, and (2) all third-party products included by Accela in its solicitation response require the originator of the solicitation to agree in writing to third-party license terms. Accela's relevant sample agreement is herein attached at the end of this section.

Thank you for your consideration. Accela looks forward to a constructive and positive discussion.



## ACCELA SUBSCRIPTION SERVICES AGREEMENT

This Accela Subscription Services Agreement (this "**Agreement**") is entered into as of the date of the applicable Order, as defined below, that incorporates these terms (the "**Effective Date**") by and between Accela, Inc. and the entity identified in such Order ("**Customer**").

### 1. DEFINITIONS.

1.1 "**Accela System**" means the information technology infrastructure used by or on behalf of Accela in performing the Subscriptions Services, including all computers, software (including but not limited to Accela Software), hardware, databases, electronic systems (including database management systems), and networks, whether operated directly by Accela or its third party suppliers.

1.2 "**Aggregate Data**" means data and information related to Customer's use of the Subscription Services, including anonymized analysis of all data processed in the Subscription Services, that is used by Accela in an aggregate and anonymized manner, including compiling statistical and performance information related to the provision and operation of the Services.

1.3 "**Authorized User**" means one named employee, contractor or agent of Customer (each identified by a unique email address) for whom Customer has purchased a subscription to the Subscription Services and who is authorized by Customer to access and use the Services under the rights granted to Customer pursuant to this Agreement.

1.4 "**Consulting Services**" means packaged or time and materials consulting, review, training or other services (but excluding Subscription and Support Services) delivered by Accela to Customer pursuant an Order. The current Consulting Services Policy is available at [www.accela.com/terms/](http://www.accela.com/terms/).

1.5 "**Customer Data**" means the content, materials, and data that Customer, Authorized Users, and External Users enter into the Subscription Services. Customer Data does not include any component of the Subscription Services, material provided by or on behalf of Accela, or Aggregate Data.

1.6 "**Documentation**" means the then-current technical and functional user documentation in any form made generally available by Accela for the Subscription Services.

1.7 "**External Users**" means third party users of the Subscription Services that access the public-facing interfaces of the Subscription Services to submit queries and requests to facilitate communications between such third party and Customer.

1.8 "**Intellectual Property Rights**" means any patent rights (including, without limitation, patent applications and disclosures), copyrights, trade secrets, know-how, and any other intellectual property rights, in all cases whether or not registered or registrable and recognized in any country or jurisdiction in the world.

1.9 "**Order**" means an Accela order form or other mutually acceptable document fully executed between Customer and Accela that incorporates this Agreement.



1.10 “**Service Availability Policy**” means the Service Availability and Security Policy located at [www.accela.com/terms/](http://www.accela.com/terms/).

1.11 “**Subscription Services**” means the civic administration services, comprised of the Accela System, Software, and Support Services, to which Customer may license access to in accordance with the terms herein.

1.12 “**Software**” means any licensed software (including client software for Authorized Users’ devices) and Documentation that Accela uses or makes available as part of the Subscription Services.

1.13 “**Support Services**” means those technical and help services provided by Accela in accordance with the Software Support Services Policies (SaaS) located at [www.accela.com/terms/](http://www.accela.com/terms/).

1.14 “**Subscription Period**” means the duration of Customer’s authorized use of the Subscription Services as designated in the Order.

## 2. USAGE AND ACCESS RIGHTS.

2.1 Right to Access. Subject to the terms and conditions of this Agreement, Accela hereby grants to Customer a limited, non-exclusive, non-transferable right and license during the Subscription Period, to permit: (i) Authorized Users to access and use the internal and administrative interfaces of the Subscription Services in accordance with the Documentation to support Customer’s internal business purposes and (ii) its External Users the ability to access and use the publicly available interfaces to submit requests and information to Customer. Each instance of the Subscription Service shall be provisioned with the amount of storage set forth in the Order and additional storage may be purchased at the then-current rates.

2.2 Support Services & Service Availability. During the Subscription Period, Accela shall provide to Customer the Support Services specified in the Order and shall make all commercially reasonable efforts to attain the service levels specified in the applicable policies. The remedies set forth in the Support Services and Service Availability Policy are the sole and exclusive remedies for any breach of the service levels. Customer grants Accela a royalty-free, worldwide, transferable, sub- licensable, irrevocable, perpetual license to use or incorporate into its software or services any suggestions or other feedback provided by Customer or Authorized Users relating to the operation or features of the Subscription Services.

2.3 Purchasing Consulting Services. Customer may purchase Consulting Services from Accela by executing an Order for such services. All prices are exclusive of travel and expenses, which will be invoiced at actual cost, without markup, and will comply with the Consulting Services Policy located at [www.accela.com/terms/](http://www.accela.com/terms/) or as otherwise agreed in the applicable Order. If applicable, one Consulting Services day shall be equal to eight (8) hours.

2.4 Restrictions on Use. Customer shall not, and shall not permit others to: (i) use or access the Subscription Services in any manner except as expressly permitted by the Agreement, including but not limited to, in a manner that circumvents contractual usage restrictions set forth in this Agreement; (ii) license, sub-license, sell, re-sell, rent, lease, transfer, distribute, time share or otherwise make any portion of the Subscription Services available for access by third parties except as otherwise expressly provided herein; (iii) use the Subscription Service in a way that: (a) violates or infringes upon the rights





of a third party; or (b) stores or transmits libelous, tortious, or otherwise unlawful material or malicious code or viruses; (iv) create derivative works, reverse engineer, decompile, disassemble, copy, or otherwise attempt to derive source code or other trade secrets from or about any of the Subscription Services (except to and only to the extent such rights are proscribed by law); (v) interfere with or disrupt the security, integrity, operation, or performance of the Subscription Services; (vi) access, use, or provide access or use to the Subscription Services or Documentation for the purposes of competitive analysis or the development, provision, or use of a competing software, SaaS or product or any other purpose that is to Accela's detriment or commercial disadvantage; (vii) provide access to the Subscription Services to competitors of Accela; (viii) access or use components of the Subscription Service not licensed by Customer; (ix) use or allow the use of the Subscription Services by anyone located in, under the control of, or that is a national or resident of a U.S. embargoed country or territory or by a prohibited end user under Export Control Laws (as defined in Section 12.3, Compliance with Laws); (x) remove, delete, alter or obscure any trademarks, Documentation, warranties, or disclaimers, or any copyright, trademark, patent or other intellectual property or proprietary rights notices from any Subscription Services; or (xi) access or use the Subscription Services in, or in association with, the design, construction, maintenance, or operation of any hazardous environments, systems or applications, any safety response systems or other safety-critical applications, or any other use or application in which the use or failure of the Subscription Services could lead to personal injury or severe physical or property damage.

**2.5 Ownership.** Accela retains all Intellectual Property Rights, including all rights, title and license to the Subscription Service, Software, Accela System, Support Services, Consulting Services, and Aggregate Data, any related work product of the foregoing and all derivative works thereof by whomever produced; provided however, that to the extent such materials are delivered to Customer as part of the Subscription Services, Consulting Services or Support Services then Customer shall receive a limited license consistent with the terms of Section 2 to use such materials during the Subscription Period.

**2.6 Customer's Responsibilities.** Customer will: (i) be responsible for meeting Accela's applicable minimum system requirements for use of the Subscription Services set forth in the Documentation; (ii) be responsible for Authorized Users' compliance with this Agreement and for any other activity (whether or not authorized by Customer) occurring under Customer's account; (iii) be solely responsible for the accuracy, quality, integrity and legality of Customer Data; (iv) use commercially reasonable efforts to prevent unauthorized access to or use of the Subscription Services and Customer Data under its account, and notify Accela promptly of any such unauthorized access or use, and; (v) use the Subscription Services only in accordance with the applicable Documentation, laws and government regulations.

### **3. PAYMENT TERMS.**

**3.1 Purchases Directly from Accela.** Except as otherwise set forth in an Order, Subscription fees shall be invoiced annually in advance and such fees shall be due and payable on the first day of the Subscription and on each anniversary thereafter for each renewal, if any. All other invoices shall be due and payable net thirty (30) from the date of the applicable invoice. All amounts payable to Accela under this Agreement shall be paid by Customer in full without any setoff, deduction, debit, or withholding for any reason. Any late payments shall be subject to an additional charge of the lesser of 1.5% per month or the maximum permitted by law. All Subscription Services fees are exclusive of any taxes, levies, duties,



withholding or similar governmental assessments of any nature (collectively, "**Taxes**"). If any such Taxes are owed or payable for such transactions, they shall be paid separately by Customer without set-off to the fees due Accela.

**3.2 Purchases from Authorized Resellers.** In the event that Customer has purchased any products or services through a reseller, subject to these terms, any separate payment arrangements and terms shall be exclusively through such reseller and Accela is not a party to such transactions. Accela's sole obligations are set forth herein and Customer acknowledges that its rights hereunder may be terminated for non-payment to such third party.

**4. CONFIDENTIALITY.** As used herein, "**Confidential Information**" means all confidential information disclosed by a one party to this Agreement to the other party of this Agreement whether orally or in writing, that is designated as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of disclosure. However, Confidential Information will not include any information that: (i) is or becomes generally known to the public without breach of any obligation owed to the disclosing party; (ii) was known to the receiving party prior to its disclosure without breach of any obligation owed to the disclosing party; (iii) is received without restriction from a third party without breach of any obligation owed to the disclosing party; or (iv) was independently developed by the receiving party. Each party will use the same degree of care that it uses to protect the confidentiality of its own confidential information of like kind (but in no event less than reasonable care) not to disclose or use any Confidential Information except as permitted herein, and will limit access to Confidential Information to those of its employees, contractors and agents who need such access for purposes consistent with this Agreement and who are bound to protect such Confidential Information consistent with this Agreement. The receiving party may disclose Confidential Information if it is compelled by law to do so, provided the receiving party gives the disclosing party prior notice of such compelled disclosure (to the extent legally permitted) and reasonable assistance, at the disclosing party's request and cost, to contest, limit, or protect the disclosure.

## **5. CUSTOMER DATA.**

**5.1 Ownership.** Customer reserves all its rights, title, and interest in and to the Customer Data. No rights are granted to Accela hereunder with respect to the Customer Data, except as otherwise set forth explicitly in Section 5.

**5.2 Usage.** Customer shall be responsible for Customer Data as entered in to, applied or used in the Subscription Services. Customer acknowledges that Accela generally does not have access to and cannot retrieve lost Customer Data. Customer grants to Accela the non-exclusive right to process Customer Data (including personal data) for the sole purpose of and only to the extent necessary for Accela: (i) to provide the Subscription Services; (ii) to verify Customer's compliance with the restrictions set forth in Section 2.4 (Restrictions on Use) if Accela has a reasonable belief of Customer's non-compliance; and (iii) as otherwise set forth in this Agreement. Accela may utilize the information concerning Customer's use of the Subscription Services (excluding any use of Customer's Confidential Information) to improve Subscription Services, to provide Customer with reports on its use of the Subscription Services, and to compile aggregate statistics and usage patterns by customers using the Subscription Services.

**5.3 Use of Aggregate Data.** Customer agrees that Accela may collect, use and disclose Aggregate Data derived from the use of the Subscription Services for industry analysis, benchmarking, analytics,



marketing and other business purposes. All Aggregate Data collected, used and disclosed will be in aggregate form only and will not identify Customer, its Authorized Users or any third parties utilizing the Subscription Services.

## **6. WARRANTIES AND DISCLAIMERS.**

**6.1 Subscription Services Warranty.** During the Subscription Period, Accela warrants that Subscription Services shall perform materially in accordance with the applicable Documentation. As Customer's sole and exclusive remedy and Accela's entire liability for any breach of the foregoing warranty, Accela will use commercially reasonable efforts to: (a) repair the Subscription Services in question; (b) replace the Subscription Services in question with those of substantially similar functionality; or (c), after making all commercially reasonable attempts to do the foregoing, terminate the applicable Subscription Services and refund all unused, prepaid fees paid by Customer for such non-compliant Subscription Services.

**6.2 Consulting Services Warranty.** For ninety (90) days from the applicable delivery, Accela warrants that Consulting Services shall be performed in a professional and workmanlike manner. As Customer's sole and exclusive remedy and Accela's entire liability for any breach of the foregoing warranty, Accela will use commercially reasonable efforts to (a) re-perform the Consulting Services in a compliant manner; or, after making all commercially reasonable attempts to do the foregoing, (b) refund the fees paid for the non-compliant Consulting Services.

**6.3. Disclaimers.** EXCEPT AS EXPRESSLY PROVIDED HEREIN, ACCELA MAKES NO WARRANTY OF ANY KIND, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AND SPECIFICALLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, SECURITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

**6.4. Cannabis-Related Activities.** If Customer purchases any Subscription Services for use with any cannabis-related activities, the following additional disclaimers shall apply: Accela is considered a software service provider to its customers and not a cannabis related business or agent thereof. In addition to the foregoing, Accela only retains Subscription Services fees of this Agreement from its Customer for general software services, a state or local government agency, and does not retain these fees from any type of External Users. It is the sole responsibility of the Customer to offer state law compliant services, which may be coordinated and facilitated through the use of the Subscription Services. Accela makes no representations, promises, or warranties with respect to the legality, suitability, or otherwise regarding any third party provider, including partners, and have no responsibility or liability with respect to services provided to Customer by such third parties.

**7. INDEMNIFICATION.** Accela will defend (or at Accela's option, settle) any third party claim, suit or action brought against Customer to the extent that it is based upon a claim that the Subscription Services, as furnished by Accela hereunder, infringes or misappropriates the Intellectual Property Rights of any third party, and will pay any costs, damages and reasonable attorneys' fees attributable to such claim that are finally awarded against Customer, provided that Customer provides: (a) Accela notice of such claim as soon practical and in no event later than would reasonably permit Accela to respond to such claim, (b) reasonable cooperation to Accela, at Accela's expense, in the defense and/or settlement of such claim and (c) Accela the sole and exclusive control of the defense, litigation and settlement of such claim. In the event that Accela reasonably believes, in its sole discretion, that such claim may



prevail or that the usage of the Subscription Services may be joined, Accela may seek to: (a) modify the Subscription Services such that it will be non-infringing (provided such modification does not materially reduce the functionality or performance of Customer's installed instance); (b) replace the Subscription Services with a service that is non-infringing and provides substantially similar functionality and performance; or, if the first two options are not commercially practicable, (c) terminate the remainder of the Subscription Period and refund any, pre-paid, unused fees received by Accela. Accela will have no liability under this Section 7 to the extent any claims arise from (i) any combination of the Subscription Services with products, services, methods of a third party; (ii) a modification of the Subscription Services that were either implemented by anyone other than Accela or implemented by Accela in accordance with Customer specifications; (iii) any use of the Subscription Services in a manner that violates this Agreement or the instructions given to Customer by Accela; (iv) a version of the Subscription Services other than the current, fully patched version, provided such updated version would have avoided the infringement; or (v) Customer's breach of this Agreement. THIS SECTION 7 STATES THE ENTIRE OBLIGATION OF ACCELA AND ITS LICENSORS WITH RESPECT TO ANY ALLEGED OR ACTUAL INFRINGEMENT OR MISAPPROPRIATION OF INTELLECTUAL PROPERTY RIGHTS RELATED TO THIS AGREEMENT.

**8. LIMITATION OF LIABILITY.** EXCEPT FOR LIABILITY ARISING OUT OF EITHER PARTY'S LIABILITY FOR DEATH OR PERSONAL INJURY OR CUSTOMER'S BREACH OF SECTION 2, NEITHER PARTY'S AGGREGATE LIABILITY FOR DAMAGES ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT OR FROM THE USE OF OR INABILITY TO USE THE SERVICE, WHETHER IN CONTRACT, TORT OR UNDER ANY OTHER THEORY OF LIABILITY, SHALL EXCEED THE TOTAL AMOUNT PAID BY CUSTOMER HEREUNDER IN THE TWELVE (12) MONTH PERIOD IMMEDIATELY PRECEDING THE INCIDENT. EXCEPT FOR LIABILITY ARISING OUT OF CUSTOMER'S BREACH OF SECTION 2 OR EITHER PARTY'S LIABILITY FOR DEATH OR PERSONAL INJURY, IN NO EVENT SHALL EITHER PARTY OR ANY OTHER PERSON OR ENTITY INVOLVED IN CREATING, PRODUCING OR DELIVERING THE SERVICE BE LIABLE FOR ANY INCIDENTAL, SPECIAL, EXEMPLARY OR CONSEQUENTIAL DAMAGES, INCLUDING LOST PROFITS, LOSS OF DATA OR LOSS OF GOODWILL, SERVICE INTERRUPTION, COMPUTER DAMAGE OR SYSTEM FAILURE OR THE COST OF SUBSTITUTE PRODUCTS OR SERVICES, ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT OR FROM THE USE OF OR INABILITY TO USE THE SUBSCRIPTION SERVICES, WHETHER BASED ON WARRANTY, CONTRACT, TORT (INCLUDING NEGLIGENCE), PRODUCT LIABILITY OR ANY OTHER LEGAL THEORY. THE FOREGOING EXCLUSIONS APPLY WHETHER OR NOT A PARTY HAS BEEN INFORMED OF THE POSSIBILITY OF SUCH DAMAGE, AND EVEN IF A LIMITED REMEDY SET FORTH HEREIN IS FOUND TO HAVE FAILED OF ITS ESSENTIAL PURPOSE.

**9. SECURITY.** Accela has implemented commercially viable and reasonable information security processes, policies and technology safeguards to protect the confidentiality and integrity of Customer Data, personal data protect against reasonably anticipated threats. Customer acknowledges that, notwithstanding security features of the Subscription Services, no product, hardware, software or service can provide a completely secure mechanism of electronic transmission or communication and that there are persons and entities, including enterprises, governments and quasi- governmental actors, as well as technologies, that may attempt to breach any electronic security measure. Subject only to its limited warranty obligations set forth in Section 6, Accela will have no liability for any such security breach. Customer further acknowledges that the Subscription Services is not guaranteed to operate without interruptions, failures, or errors. If Customer or Authorized Users use the Subscription Services



in any application or environment where failure could cause personal injury, loss of life, or other substantial harm, Customer assumes any associated risks and will indemnify Accela and hold it harmless against those risks.

**1. THIRD PARTY SERVICES.** Customer may choose to obtain a product or service from a third party that is not directly produced by Accela as a component of the Subscription Services ("**Third Party Services**") and this may include third party products resold by Accela. Accela assumes no responsibility for, and specifically disclaims any liability, warranty or obligation with respect to, any Third Party Service or the performance of the Subscription Services (including Accela's service level commitment) when the Subscription Services are used in combination with or integrated with Third Party Services.

## **2. TERM AND TERMINATION.**

**11.1 Agreement Term.** This Agreement shall become effective on the Effective Date and shall continue in full force and effect until the expiration of any Subscription Periods set forth in an applicable Order governed by the Agreement.

**11.2 Subscription Periods & Renewals.** Subscription Periods begin as specified in the applicable Order and, unless terminated earlier in accordance with this Agreement, continue for the term specified therein. Except as otherwise specified in the applicable Order, (a) all Subscription Services will automatically renew for additional Subscription Periods equal to the expiring Subscription Period, unless either party gives the other at least sixty (60) days' notice of non-renewal before the end of the relevant Subscription Period and (b), Orders may only be cancelled or terminated early in accordance with Section 11.3. Subscription Services renewals may be subject to an annual increase, for which Accela shall provide Customer notice prior to the renewal of the Subscription Period. In the event of any non-renewal or other termination, Customer's right to use the Subscription Services will terminate at the end of the relevant Subscription Period.

**11.3 Termination or Suspension for Cause.** A party may terminate this Agreement and Subscription Services license granted hereunder for cause upon thirty (30) days' written notice to the other party of a material breach if such breach remains uncured at the expiration of such thirty (30) day period. Either party may terminate immediately if the other party files for bankruptcy or becomes insolvent. Accela may, at its sole option, suspend Customer's or any Authorized User's access to the Subscription Services, or any portion thereof, immediately if Accela: (i) suspects that any person other than Customer or an Authorized User is using or attempting to use Customer Data; (ii) suspects that Customer or an Authorized User is using the Subscription Services in a way that violates this Agreement and could expose Accela or any other entity to harm or legal liability; (iii) is or reasonably believes it is required to do so by law or court order or; (iv) Customer's payment obligations are more than ninety (90) days past due, provided that Accela has provided at least thirty (30) days' notice of such suspension for delinquent payment. Should Customer terminate this Agreement for cause, Accela will refund a pro-rata portion of unused, pre-paid fees.

**11.4 Effect of Termination.** If this Agreement expires or is terminated for any reason: (i) within thirty (30) calendar days following the end of Customer's final Subscription Period, upon Customer's request Accela provided Customer Data and associated documents in a database dump file; provided that Customer pays (a) all costs of and associated with such copying, as calculated at Accela's then-current time-and-materials rates, and (b) any and all unpaid amounts due to Accela; (ii) licenses and use rights



granted to Customer with respect to Subscription Services and intellectual property will immediately terminate; and (iii) Accela's obligation to provide any further services to Customer under this Agreement will immediately terminate, except as mutually agreed between the parties. If the Subscription Services are nearing expiration date or are otherwise terminated, Accela will initiate its data retention processes, including the deletion of Customer Data from systems directly controlled by Accela. Accela's current Data Storage Policy can be accessed [www.accela.com/terms/](http://www.accela.com/terms/).

11.5 Survival. Sections 2.5 (Ownership and Proprietary Rights), 4 (Confidentiality), 6.3 (Disclaimer), 8 (Limitation of Liability), 11.4 (Effect of Termination), 11.5 (Surviving Provisions), and 12 (General Provisions) will survive any termination or expiration of this Agreement.

## 12. GENERAL.

12.1 Notice. Except as otherwise specified in this Agreement, all notices, permissions and approvals hereunder will be in writing and will be deemed to have been given upon: (i) personal delivery; (ii) three days after sending registered, return receipt requested, post or; (iii) one day after sending by commercial overnight carrier. Notices will be sent to the address specified by the recipient in writing when entering into this Agreement or establishing Customer's account for the Subscription Services.

12.2 Governing Law and Jurisdiction. This Agreement and any action related thereto will be governed by the laws of the State of California without regard to its conflict of laws provisions. The exclusive jurisdiction and venue of any action related to the subject matter of this Agreement will be the state and federal courts located in the Northern District of California and each of the parties hereto waives any objection to jurisdiction and venue in such courts.

12.3 Compliance with Laws. Each party will comply with all applicable laws and regulations with respect to its activities under this Agreement including, but not limited to, export laws and regulations of the United States and other applicable jurisdictions. Further, in connection with the services performed under this Agreement and Customer's use of the Subscription Services, the parties agree to comply with all applicable anti-corruption and anti-bribery laws, statutes and regulations.

12.4 Assignment. Customer may not assign or transfer this Agreement, whether by operation of law or otherwise, without the prior written consent of Accela, which shall not be unreasonably withheld. Any attempted assignment or transfer, without such consent, will be null and void. Subject to the foregoing, this Agreement will bind and inure to the benefit of the parties, their respective successors and permitted assigns.

12.5 Publicity. Notwithstanding anything to the contrary, each party will have the right to publicly announce the existence of the business relationship between parties without disclosing the specific terms of the Agreement.

12.6 Miscellaneous. No failure or delay by either party in exercising any right under this Agreement will constitute a waiver of that right. Other than as expressly stated herein, the remedies provided herein are in addition to, and not exclusive of, any other remedies of a party at law or in equity. If any provision of this Agreement is held by a court of competent jurisdiction to be contrary to law, the provision will be modified by the court and interpreted so as best to accomplish the objectives of the original provision to the fullest extent permitted by law, and the remaining provisions of this Agreement will remain in effect. Accela will not be liable for any delay or failure to perform under this Agreement to the extent such





delay or failure results from circumstances or causes beyond the reasonable control of Accela. This Agreement does not create a partnership, franchise, joint venture, agency, fiduciary or similar relationship between the parties. This Agreement, including any attachments hereto as mutually agreed upon by the parties, constitute the entire agreement between the parties concerning its subject matter and it supersedes all prior communications, agreements, proposals or representations, written or oral, concerning its subject matter. No modification, amendment, or waiver of any provision of this Agreement will be effective unless in writing and signed by a duly authorized representative of each party against whom the modification, amendment or waiver is to be asserted. Notwithstanding any language to the contrary, no additional or conflicting terms or conditions stated in any of Customer's purchase order documentation or otherwise will be incorporated into or form any part of this Agreement, and all such terms or conditions shall be null and void.

SAMPLE

## 5 Appendices

**The multi-tab Excel spreadsheet files contain all appendices listed below. Appendices must be filled in and submitted using these electronic forms (multi-tab Excel files) and must also be printed and included in your proposal.**

**Accela has included the following in this section:**

- RFP Appendix A – Land Management/Function Workbook Tabs
- RFP Appendix B Vendor Profile
- RFP Appendix C Vendor Financial Information
- RFP Appendix D Vendor Customer Base
- RFP Appendix E Vendor References
- RFP Appendix F Vendor General System
- RFP Appendix G1 On-Premise Project Costs
- RFP Appendix G2 Cloud/Hosted Project Costs
- RFP Appendix H Interface Costs
- RFP Appendix I Conversion Costs
- RFP Appendix J Modification Costs





## City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

### Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
<b>Planning and Land Development Projects</b>									
<b>GENERAL</b>									
PLANNING	1.001	<b>CASE NUMBER</b> - Ability for a case number to comprise of multiple letter prefix, 2-digit year, and incremental number.	X						
PLANNING	1.002	<b>AGENCY-DEFINED FIELDS</b> - Provide for "unlimited" Agency-defined fields based on project type. If limited, please explain in comments.	X						
PLANNING	1.003	<b>PROPERTY ASSOCIATION</b> - Allow for an unlimited number of parcels to be associated with an individual project or case number.	X						
PLANNING	1.004	<b>PROJECT SUBTYPES</b> - Ability to allow sub-types by project type.	X						
PLANNING	1.005	<b>PROJECTS BY ADDRESS</b> - Ability to link various project applications by address.	X						
PLANNING	1.006	<b>SUB-PROJECTS</b> - Ability to setup unlimited sub-projects within a single master project (e.g., multiple use projects - residential, commercial, multi-family).	X						
PLANNING	1.007	<b>PERMIT/PROJECT ASSOCIATION</b> - Ability to associate all permits and projects to a primary project (e.g., Subdivision Development).	X						
PLANNING	1.008	<b>MULTIPLE CONTACT TYPES</b> - Ability for the Agency to record multiple individuals/names per application to include (but not limited to) Property Owner of Record, Authorized Agent (if different from Property Owner), and Applicant (if different from Property Owner), Developer, Bill Payer, etc. Information captured to include name, address, multiple phone numbers, fax number, and e-mail address.	X						
PLANNING	1.009	<b>CONTRACTOR DATABASE</b> -Ability to select from contractor or similar database.	X						
PLANNING	1.010	<b>ATTACHMENTS</b> - Ability to attach documents, photos, and scanned documents for planning projects.	X						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PLANNING	1.011	<b>APPLICATION TYPES</b> - Provide for the tracking of "unlimited" application types such as:	x						
PLANNING	1.012	▪ <b>Engineering</b>	x						
PLANNING	1.013	▪ Final Parcel Map	x						
PLANNING	1.014	▪ Final Tract Map	x						
PLANNING	1.015	▪ Lot Line Adjustment	x						
PLANNING	1.016	▪ Lot Mergers	x						
PLANNING	1.017	▪ Street Address Change Review	x						
PLANNING	1.018	▪ Street And Alley Vacation Request	x						
PLANNING	1.019	▪ <b>Planning</b>							
PLANNING	1.020	▪ Administrative Permits	x						
PLANNING	1.021	▪ Annexation / Deannexation Processing	x						
PLANNING	1.022	▪ Appeal of Revocation Hearing	x						
PLANNING	1.023	▪ Appeal to City Council	x						
PLANNING	1.024	▪ Appeal to City Council - Non-Hearing Items	x						
PLANNING	1.025	▪ Appeal to Planning Commission	x						
PLANNING	1.026	▪ Appeal to Planning Commission - Non-Hearing Items	x						
PLANNING	1.027	▪ Art In Public Places Review	x						
PLANNING	1.028	▪ Code Amendment Proposed By Applicant	x						
PLANNING	1.029	▪ Code, Covenants, & Restrictions Review (CC&R)	x						
PLANNING	1.030	▪ Conceptual Plan Review	x						
PLANNING	1.031	▪ Conditional Use Permit	x						
PLANNING	1.032	▪ Design Subcommittee Review	x						
PLANNING	1.033	▪ Development Plan	x						
PLANNING	1.034	▪ Extension of Time	x						
PLANNING	1.035	▪ General Plan Amendment	x						
PLANNING	1.036	▪ Historic Property Certificate of Appropriateness	x						
PLANNING	1.037	▪ Pre-Application	x						
PLANNING	1.038	▪ Precise Plan of Design	x						
PLANNING	1.039	▪ Preliminary Review Meeting	x						
PLANNING	1.040	▪ Special Exception Review	x						
PLANNING	1.041	▪ Tentative Parcel Map Processing	x						
PLANNING	1.042	▪ Tentative Tract Map Processing	x						
PLANNING	1.043	▪ Variance Review	x						
PLANNING	1.044	▪ Zoning Verifications	x						
PLANNING	1.045	<b>PLANNING PROJECT APPLICATIONS</b> - Ability to capture and track, at a minimum, the following planning application fields:	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
PLANNING	1.046	▪ Project/File number;	X							
PLANNING	1.047	▪ Project name;	X							
PLANNING	1.048	▪ Application Date;	X							
PLANNING	1.049	▪ Project Address;	X							
PLANNING	1.050	▪ Project location tract number;	X							
PLANNING	1.051	▪ Project location lot number;	X							
PLANNING	1.052	▪ Project Acreage;	X							
PLANNING	1.053	▪ General location description (text);	X							
PLANNING	1.054	▪ Legal location description (text);	X							
PLANNING	1.055	▪ Present zoning;	X							
PLANNING	1.056	▪ Proposed zoning;	X							
PLANNING	1.057	▪ Present use;	X							
PLANNING	1.058	▪ Proposed use;	X							
PLANNING	1.059	▪ Applicant name;	X							
PLANNING	1.060	▪ Applicant address;	X							
PLANNING	1.061	▪ Applicant primary telephone;	X							
PLANNING	1.062	▪ Applicant mobile telephone;	X							
PLANNING	1.063	▪ Applicant fax;	X							
PLANNING	1.064	▪ Applicant email;	X							
PLANNING	1.065	▪ Owner name;	X							
PLANNING	1.066	▪ Owner address;	X							
PLANNING	1.067	▪ Owner primary telephone;	X							
PLANNING	1.068	▪ Owner mobile telephone;	X							
PLANNING	1.069	▪ Owner fax;	X							
PLANNING	1.070	▪ Owner email;	X							
PLANNING	1.071	▪ Meeting Dates	X							
PLANNING	1.072	▪ Public Hearing Dates	X							
PLANNING	1.073	▪ Approval Dates	X							
PLANNING	1.074	▪ Resolution Dates	X							
PLANNING	1.075	▪ Resolution #	X							
PLANNING	1.076	▪ CEQA Determinations	X							
PLANNING	1.077	▪ Status	X							
PLANNING	1.078	▪ Closeout Date	X							
PLANNING	1.079	▪ Other, Agency-defined fields (i.e., number of buildings, stories, units, rooms)	X							
PLANNING	1.080	REASSIGN CASE PLANNERS - Ability to reassign case planners at any time.	X							
PLANNING	1.081	APPLICATION INTAKE								

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
PLANNING	1.082	<b>APPLICATION INTAKE CHECKLIST</b> - Ability to create Agency-defined intake checklist for initial applications by project type.	x					
PLANNING	1.083	<b>APPLICATION REVIEW CHECKLIST</b> - Ability to create Agency-defined review checklists by project type.	x					
PLANNING	1.084	<b>PLAN APPLICATION</b> - Ability for Agency to define planning project application requirements (e.g., steps, tasks, fields, etc.)	x					
PLANNING	1.085	<b>PROJECT DESCRIPTION</b> - Project Description shall include the ability to enter unlimited free form text to describe the property.	x					
PLANNING	1.086	<b>PROJECT LOCATON DATA</b> - Project Location data to include ability to capture Address, Zoning District, General Plan Description, Sub-Area, Assessor Parcel No., Tract No., and Lot No.	x					
PLANNING	1.087	<b>DEPOSIT TRACKING</b>						
PLANNING	1.088	<b>DEPOSIT TRACKING</b> - Ability to record and track deposits received and date of receipt.	x					
PLANNING	1.089	<b>ADDITIONAL DEPOSITS</b> - Ability for the Agency to take additional deposits during the entire planning application process, and track customer credit balance or refund due.	x					
PLANNING	1.090	<b>DEVELOPER TRACKING</b> - Track deposits, payments, and balances by developer, not just by single project or permit.	x					
PLANNING	1.091	<b>DEPOSIT REQUIREMENT ADJUSTMENTS</b> - Ability to adjust deposit amounts at any time (discretionary).	x					
PLANNING	1.092	<b>DEPOSITS FOR CONSULTING/ENGINEERING FEES</b> - Ability to track deposits and fees for outside studies or reviews (e.g. environmental studies).	x					
PLANNING	1.093	<b>DEPOSIT INVOICE - FEE SUMMARY</b> - Ability for deposit invoice to show amounts paid to-date and a summary fees incurred by fee type.	x					
PLANNING	1.094	<b>DEPOSIT BALANCE TRANSFER</b> - Ability to transfer the deposit balance of the planning project phase to the permit application or other planning projects.	x					
PLANNING	1.095	<b>BONDS</b>						
PLANNING	1.096	<b>BOND ASSESSMENT</b> - Ability to track cash sureties, Letters of Credit, CDs, and other forms of Bonds - Data fields to be tracked include:	x					
PLANNING	1.097	▪ Bond amount	x					
PLANNING	1.098	▪ Bond payment type (e.g., cash, check, credit card, letter of credit, cd, etc.)	x					
PLANNING	1.099	▪ Bond assessment date	x					
PLANNING	1.100	▪ Bond release date	x					
PLANNING	1.101	▪ Notes	x					
PLANNING	1.102	<b>BOND RELEASE</b> - Ability to release a bond and track release amount and release date.	x					
PLANNING	1.103	<b>ALERTS AND HOLDS</b>						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PLANNING	1.104	<b>ALERTS</b> - Allow ability to <i>flag</i> entire projects or individual project conditions so as to <i>alert</i> or warn any personnel of a project or special condition at the time of permit application.	x						
PLANNING	1.105	<b>ALERTS</b> - Ability to add flags as needed by Agency personnel for any Agency defined alert such: as stop work notices, permit holds, open code enforcement cases, overdue deposits, etc.	x						
PLANNING	1.106	<b>STOP PROJECT</b> - Ability to issue a stop to a parcel or project that would block additional permits being issued until condition was removed.	x						
PLANNING	1.107	<b>PROJECT HOLD - INCOMPLETE SUBMISSION</b> - Ability to place a hold on a project with incomplete submissions.	x						
PLANNING	1.108	<b>PROJECT HOLD - UNPAID FEES</b> - Ability to place a hold on a project if there are unpaid fees.	x						
PLANNING	1.109	<b>PROJECT HOLD - UNLICENSED CONTRACTOR</b> - Ability to place a hold on a project with unlicensed contractors.	x						
PLANNING	1.110	<b>WORKFLOW</b>							
PLANNING	1.111	<b>PLAN CHECK WORK FLOW REQUIREMENTS</b> - Ability to set up different plan check requirements (e.g., commercial development project, property rezone, full entitlement, etc.).	x						
PLANNING	1.112	<b>OUTSIDE AGENCY ROUTING</b> - Allow Agency-defined plan review routing based on type of work performed to multiple <b>non-agency</b> users/outside agencies (e.g., Environmental Health, Health Department, Waste Water, etc.).	x						
PLANNING	1.113	<b>WORKFLOW</b> - Need workflow capability to establish required planning process steps and prerequisite requirements (e.g. step 7 can only be done after step 5).	x						
PLANNING	1.114	<b>WORKFLOW</b> - Provide for the Agency-definition of application work flow within multiple departments and to external agencies based on the type of application.	x						
PLANNING	1.115	<b>SUB-TASKS</b> - Ability to set up multiple plan review steps and sub-tasks.	x						
PLANNING	1.116	<b>ASSIGNEE STATUS</b> - Ability to track task status, review comments, and completions by assignee.	x						
PLANNING	1.117	<b>WORKFLOW ROUTING</b> - Automatic routing of projects through various Agency-defined processes consisting of various review and approval functions.	x						
PLANNING	1.118	<b>EXTERNAL AGENCY ACCESS</b> -Ability for external agencies access to the application through a secured portal (e.g., contracted plan reviewers).	x						
PLANNING	1.119	<b>EXTERNAL AGENCY ACCESS - COMMENTS</b> -Ability to track external agency review comments.	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
PLANNING	1.120	<b>PLAN PROCESS TIMELINES</b> - Ability to track planning process time, excluding time a project is on hold waiting on developers/owners.	x					
PLANNING	1.121	<b>INQUIRY</b> - Provide the capability to query acreage, parcel numbers, project/case numbers, etc.	x					
PLANNING	1.122	<b>GIS MAP INQUIRY</b> - Ability to plot geographic planning inquiries on the Agency's map.	x					
PLANNING	1.123	<b>RADIUS SEARCHES</b> - Ability to perform searches within a radius (e.g., parcels/addresses within a given area).	x					
PLANNING	1.124	<b>RADIUS LETTERS</b> - Ability to use a radius search to select property owners to be notified of a project.	x					
PLANNING	1.125	<b>SCHEDULING</b>						
PLANNING	1.126	<b>ASSOCIATE KEY DATE TO REVIEW STEP</b> - Provide the ability to tie a key date calculation to a project review step (i.e., 14 day review, dept. review, Planning hearing, Council meeting, etc.).	x					
PLANNING	1.127	<b>AUTOMATIC REMINDERS</b> - Ability to set automatic staff reminders/notifications based on plan review phases (e.g. preliminary plan review date, expected date of completion, etc.).	x					
PLANNING	1.128	<b>AUTO-DEFINE KEY DATE</b> - Ability to calculate Agency-defined review and expiration dates for all projects events automatically as part of the review process for a project.	x					
PLANNING	1.129	<b>AUTOMATIC RE-DATE UPON STEP COMPLETION</b> - Provide an automatic date calculation for next step when a prerequisite review step is completed.	x					
PLANNING	1.130	<b>CONDITIONS OF APPROVAL (COA)</b>						
PLANNING	1.131	<b>CHANGE COA</b> - Ability to add, modify or delete conditions of approval during the project approval process.	x					
PLANNING	1.132	<b>ACCUMULATE COMMENTS AND COA</b> - Provide for electronic collection of Agency comments and conditions as review progresses.	x					
PLANNING	1.133	<b>PARCEL INQUIRY</b> - Ability to tie all conditions of approval to the parcel inquiry screen.	x					
PLANNING	1.134	<b>STANDARD COA</b> - Provide a Agency defined table of standard or recurring conditions that can be accessed and applied to a project during project processing, thereby eliminating the need to enter repetitive "boilerplate" conditions.	x					
PLANNING	1.135	<b>PERMIT ISSUANCE RESTRICTIONS</b> - Provide for restriction of permit approval until conditions or restrictions have been satisfied.	x					
PLANNING	1.136	<b>FREE FORM COA</b> - Ability for Engineering, Fire, Police, Recreation, etc. to enter free-form comments on demand.	x					
PLANNING	1.137	<b>COA DUE DATES</b> - Ability to schedule due date for conditions of approval to be completed.	x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
PLANNING	1.138	<b>COA DEPARTMENT APPROVAL</b> - Ability for departments to electronically signoff on conditions of approval.	x							
PLANNING	1.139	<b>PLAN CHECK LETTERS</b>								
PLANNING	1.140	<b>PLAN CHECK LETTERS</b> - Ability to generate plan check comment letters.	x							
PLANNING	1.141	<b>PLAN CHECK LETTER EDITS</b> - Ability to edit plan review letters before printing.	x							
PLANNING	1.142	<b>PLAN CHECK LETTER - E-MAIL</b> - Ability for system to e-mail plan review letters to applicants.	x							
PLANNING	1.143	<b>PLAN CHECK LETTER - REVIEWER INFORMATION</b> - Ability to include in the plan check letter to the applicants a list of the plan reviewers by name, phone, department, and email.	x							
PLANNING	1.144	<b>FEES</b>								
PLANNING	1.145	<b>AUTO-CALCULATE FEES</b> - Calculate standard planning fees using Agency-defined criteria in a table structure.	x							
PLANNING	1.146	<b>PROJECT BALANCE ALERT</b> -Ability for system to provide an alert or flag when project balance is negative (fees still owed); when viewing/opening master planning project record.	x							
PLANNING	1.147	<b>DETAILED FEE STATUS</b> - Detailed fees status should include the following:	x							
PLANNING	1.148	▪ Fee Type	x							
PLANNING	1.149	▪ Activity Type	x							
PLANNING	1.150	▪ Deposit Amount	x							
PLANNING	1.151	▪ Balance Due/Credit Balance	x							
PLANNING	1.152	<b>FIXED AND VARIABLE FEES</b> - Ability to set up Agency-defined fixed and variable fees as follows:	x							
PLANNING	1.153	▪ Flat fee times number of units (e.g., total number of lots)	x							
PLANNING	1.154	▪ Flat \$XX fee times number unit by type (e.g., commercial or industrial units, etc.)	x							
PLANNING	1.155	▪ Flat \$XX fee per unit tiers, plus an additional flat fee per unit over the highest tier	x							
PLANNING	1.156	<b>PERCENTAGE FEES</b> - Ability to calculate fees as a percentage of building permit fee.	x							
PLANNING	1.157	<b>MISCELLANEOUS FEES</b> - Ability to calculate and track unlimited miscellaneous fees collected in conjunction with project (e.g., copies).	x							
PLANNING	1.158	<b>MISCELLANEOUS CREDIT MEMO FEES</b> - Ability to track miscellaneous credit memo fees with comments.	x							
PLANNING	1.159	<b>MISCELLANEOUS CREDIT MEMO FEES</b> - Ability to track which user entered miscellaneous credit memo fees.	x							



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PLANNING	1.160	<b>FEE SCHEDULE EFFECTIVE DATE</b> - Ability to effective date fee schedules in advance.	x						
PLANNING	1.161	<b>TIME TRACKING</b> - Ability to track hourly time spent by task and calculate fees drawing down on deposit.	x						
PLANNING	1.162	<b>BILLABLE TIME</b> - Ability to track time by project, task, date, staff, etc., in order to generate hourly rate (i.e., \$XXX per hour).	x						
PLANNING	1.163	<b>BILLABLE TIME - RATES</b> - Ability track and calculate different hourly rates by specific staff, with starting date per rate.	x						
PLANNING	1.164	<b>BILLABLE TIME - DOUBLE PAY RATES</b> - Ability to calculate hourly rates that are double the staff's pay rate.	x						
PLANNING	1.165	<b>REFUNDABLE DEPOSITS</b> - Ability to track refundable deposits (e.g., improvements, landscape, signs, etc.) including conditions and sign-offs for refund.	x						
PLANNING	1.166	<b>INVOICES</b> - Ability to print invoices showing detail/summary fees with totals paid, due, or credit balance.	x						
PLANNING	1.167	<b>FEE CHANGE NOTES</b> - Ability to track notes for fees that are manually changed during project/process.	x						
PLANNING	1.168	<b>FEES BY PROJECT TYPE</b> - Planning fees should be set up by project type.	x						
PLANNING	1.169	<b>FEES BY TASK TYPE</b> - Planning fees should be set up by task type.	x						
PLANNING	1.170	<b>INVOICE REPORT</b> - Ability to print a report showing invoice detail/summary fees with totals paid, due, or credit balance by invoice.	x						
PLANNING	1.171	<b>NOTIFICATION LETTERS</b>							
PLANNING	1.172	<b>FLAG COMMENTS AND NOTES FOR INCLUSION</b> - Ability for notices and letters to automatically incorporate field information, comments, notes, etc., as applicable.	x						
PLANNING	1.173	<b>MEETING NOTIFICATION</b> - Provide a method of automatically generating Agency-defined notification letters to property owners and others regarding projects and meetings associated with these projects, based on parcel selection (i.e., Public Hearing notices).	x						
PLANNING	1.174	<b>PROPOSED CHANGE NOTIFICATION</b> - Provide for automatic mail out notice to selected parcel owners and residents regarding proposed changes to related parcels by defined radius map, including buffer zone.	x						
PLANNING	1.175	<b>EDITABLE NOTIFICATIONS</b> - Ability for system to output Agency editable notice letters.	x						
PLANNING	1.176	<b>NOTIFICATION TRACKING</b> - Ability for system to track all notices sent associated to each project.	x						
PLANNING	1.177	<b>AREA/ VICINITY MAP</b> - Automatically to generate area map to accompany notice above with cartographic capabilities	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PLANNING	1.178	<b>AD HOC ADDITION OF PARCEL TO NOTIFICATION LISTS</b> - Ability to pick discretionary, impacted parcels to add to notification lists.	x						
PLANNING	1.179	<b>INQUIRY &amp; REPORTS</b>							
PLANNING	1.180	<b>PROJECT LOOK-UP</b> - Ability to look-up project status to determine reviews/comments not completed by due dates.	x						
PLANNING	1.181	<b>SPELL CHECK</b> - Provide spell checking for all reports and correspondence.	x						
PLANNING	1.182	<b>VARIOUS SORT ORDERS</b> - Provide reports of planning projects in various sort orders (by address, type of project, project number, planner assigned, dates, etc.).	x						
PLANNING	1.183	<b>STAFF REPORTS</b> - Ability to automatically generate Agency-defined staff reports and resolutions with the ability to edit before finalizing.	x						
PLANNING	1.184	<b>STAFF REPORTS</b> - Ability to setup template staff reports that will insert project conditions of approval and then allow for editing remaining report using MS Word or Word editor.	x						
PLANNING	1.185	<b>PROJECT STATUS REPORTS</b> - Ability to produce project status reports by project type, due dates, planner staff, outstanding tasks, etc.	x						
PLANNING	1.186	<b>PROJECT CRITICAL DATES REPORT</b> - Generate a report which provides critical dates for each project (e.g., submittal, approval, expiration, extension dates, etc.) .	x						
PLANNING	1.187	<b>CALENDAR OF MEETING DATES BY PROJECT</b> -Ability to provide a calendar of meeting dates by project.	x						
PLANNING	1.188	<b>CALENDAR OF MEETING DATES BY MEETING TYPE</b> -Ability to provide a calendar of meeting dates by meeting type.	x						
PLANNING	1.189	<b>CALENDAR VIEW OF ASSIGNMENTS AND DUE DATES</b> - Ability for users and to view assignments on a calendar by individual user or department.	x						
PLANNING	1.190	<b>MEETING DOCUMENTS</b> - Provide a function for producing summary documents for a project from the comments and conditions entered during the project review without the user having to retype these comments and/or conditions.	x						
PLANNING	1.191	<b>MEETING DOCUMENTS</b> - Provide a method of producing meeting documents (such as agendas) for all projects scheduled for a particular meeting and date.	x						
PLANNING	1.192	<b>MEETING DOCUMENTS</b> - Meeting documents should have the capability of printing all previously entered comments and/or conditions as part of the individual project reviews.	x						
PLANNING	1.193	<b>PLANNING ACTIVITY REPORTS</b> - Ability to report planning activity by multiple activity types (e.g., property usage, affordable units, environmental documents, project types, etc.).	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PLANNING	1.194	<b>TIME SPENT BY DEPARTMENT REVIEWING APPLICATIONS</b> -Ability to generate a report of time spent by department reviewing application.	x						
PLANNING	1.195	<b>DAYS BETWEEN PLAN SUBMISSIONS</b> - Ability to generate a report of days between plan submissions.	x						
PLANNING	1.196	<b>DAYS BETWEEN PLAN SUBMISSIONS AND PUBLIC HEARING</b> -Ability to generate a report of days between plan submissions and the first public hearing.	x						
PLANNING	1.197	<b>HOLDING PERIODS BY PARTY</b> - Ability to generate a report on the number of days a project has been in the hands of the Agency vs. the applicant (e.g., Agency took X days to review plans, applicant took X days to resubmit plans, etc.).	x						
PLANNING	1.198	<b>INTEGRATION - INTERFACE</b>							
PLANNING	1.199	<b>INTEGRATION - GENERAL LEDGER</b> - The Planning application must generate journal entries to the General Ledger for any invoices generated and revenues received, including all fees and credits.				x			Custom integration with 3rd party software will be required at implementation
PLANNING	1.200	<b>ELECTRONIC PLAN SUBMITTAL</b> - Ability to receive plan submittals electronically through the Agency's website.	x						
PLANNING	1.201	<b>ELECTRONIC PLAN REVIEW</b> - Capable of online plan review with ability to markup plans and add comments.				x			Custom integration with 3rd party software will be required at implementation
PLANNING	1.202	<b>INTEGRATION - MS OUTLOOK - CALENDAR INVITES</b> - Ability to export a calendar invite from the system to Microsoft Outlook (e.g., planning commission review meetings).					x		
PLANNING	1.203	<b>INTEGRATION - MS OUTLOOK - COA REMINDERS</b> - Provide integration between Microsoft Outlook and the Condition of Approval process to automatically sent due date reminders.					x		
PLANNING	1.204	<b>INTEGRATION - INSPECTIONS</b> - Integrate in real time to the inspections module to schedule inspections and update inspection results to the planning project.	x						
PLANNING	1.205	<b>INTEGRATE - CODE ENFORCEMENT</b> - Ability to integrate with code enforcement module to identify any property/parcel existing code cases or fines pending payment.	x						
PLANNING	1.206	<b>INTEGRATE - BUSINESS LICENSES</b> - Ability to integrate with business licensing module to identify if a developer has an active business license.	x						
PLANNING	1.207	<b>INTEGRATION - PERMITTING</b> - Provide automatic linkage between general planning applications and associated permits.	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PLANNING	1.208	<b>INTEGRATION - PARCEL/ADDRESS MANAGEMENT</b> - The parcel/address management application should provide address, parcel, owner, and zoning information to the permit system.	x						
PLANNING	1.209	<b>INTERFACE - GIS</b> - User should have the ability to select Planning data and display that data on a map, interfacing to ESRI ArcGIS ( <i>Version 10.8</i> ).	x						
PLANNING	1.210	<b>INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM</b> -Ability to integrate with a third-party document management system ( <i>Laserfiche</i> ) to attach and store files or supporting documents to a record (e.g., plan blueprints, CAD images, logs, COA narratives, etc.).				x			Custom integration with 3rd party software will be required at implemenation
PLANNING	1.211	<b>INTEGRATION - AGENDA SOFTWARE</b> - Ability to integrate with a third-party agenda software ( <i>PrimeGov</i> )				x			Custom integration with 3rd party software will be required at implemenation

## City of San Bernardino - Land Management System - Feature Function Requirements

Please input a **"1"** in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

### Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	CM	NA	Comments
<b>Permitting</b>									
<b>GENERAL</b>									
PERMITTING	2.001	<b>MAINTAIN AUDIT TRAILS</b> - Ability to maintain audit trails including changed by, changed date, and record of changes.	x						
PERMITTING	2.002	<b>INTAKE</b>							
PERMITTING	2.003	<b>AGENCY-DEFINED FIELDS</b> - Provide for <b>"unlimited"</b> <b>Agency-defined</b> fields based on permit type. If limited, please explain in comments.	x						
PERMITTING	2.004	<b>APPLICATION INTAKE</b> - Ability to intake the following types of detail on each permit/project application (including but not limited to):	x						
PERMITTING	2.005	▪ Application Date	x						
PERMITTING	2.006	▪ Application/Permit Number	x						
PERMITTING	2.007	▪ Plan Check Number	x						
PERMITTING	2.008	▪ Staff that Received Application and Plans	x						
PERMITTING	2.009	▪ Project Address	x						
PERMITTING	2.010	▪ City	x						
PERMITTING	2.011	▪ Property Owner or Tenant	x						
PERMITTING	2.012	▪ Tenant Company Name	x						
PERMITTING	2.013	▪ Architect, Designer, or Engineer	x						
PERMITTING	2.014	▪ Project Contact Person	x						
PERMITTING	2.015	▪ Owner-Builder	x						
PERMITTING	2.016	▪ License/Registration Number	x						
PERMITTING	2.017	▪ Company Name	x						
PERMITTING	2.018	Note: The following fields are to be captured for each application contact:	x						
PERMITTING	2.019	▪ Name	x						
PERMITTING	2.020	▪ Address	x						
PERMITTING	2.021	▪ City	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
PERMITTING	2.022	▪ State	X							
PERMITTING	2.023	▪ Zip	X							
PERMITTING	2.024	▪ Phone Number	X							
PERMITTING	2.025	▪ Fax Number	X							
PERMITTING	2.026	▪ E-mail Address	X							
PERMITTING	2.027	▪ Owner-Builder Business License #	X							
PERMITTING	2.028	Note: The following fields may need to be captured for permit applications.	X							
PERMITTING	2.029	▪ Type Of Construction	X							
PERMITTING	2.030	▪ Occupancy	X							
PERMITTING	2.031	▪ Zone	X							
PERMITTING	2.032	▪ Fire Sprinklers (Y/N)	X							
PERMITTING	2.033	▪ Hazardous Materials (Y/N)	X							
PERMITTING	2.034	▪ Existing Use	X							
PERMITTING	2.035	▪ Proposed Use	X							
PERMITTING	2.036	▪ Assessor Parcel#	X							
PERMITTING	2.037	▪ Map	X							
PERMITTING	2.038	▪ Lot	X							
PERMITTING	2.039	▪ Block	X							
PERMITTING	2.040	▪ Subdivision	X							
PERMITTING	2.041	▪ Construction Valuation	X							
PERMITTING	2.042	▪ Residential Or Nonresidential	X							
PERMITTING	2.043	▪ Description	X							
PERMITTING	2.044	▪ Description Of Building (i.e., Single Family, Hotel/Motel, Restaurant, Industrial, etc.)	X							
PERMITTING	2.045	▪ Building Area (Sq. ft.)	X							
PERMITTING	2.046	▪ Building Height (ft.)	X							
PERMITTING	2.047	▪ Stories	X							
PERMITTING	2.048	▪ Existing Building (Floor Area, Garage, Other, # Units)	X							
PERMITTING	2.049	▪ Additional Proposed (Floor Area, Garage, Other, # Units)	X							
PERMITTING	2.050	▪ Number Of Bedrooms	X							
PERMITTING	2.051	▪ Number Of Bathrooms	X							
PERMITTING	2.052	▪ Total Number Of Rooms	X							
PERMITTING	2.053	▪ Lot Size (Sq.Ft.)	X							
PERMITTING	2.054	▪ Lot Dimension (Front/Side/Rear)	X							
PERMITTING	2.055	▪ Coverage %	X							
PERMITTING	2.056	▪ Setbacks (i.e., Front, Rear, Left, Right)	X							
PERMITTING	2.057	▪ Easements	X							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Comments
PERMITTING	2.058	▪ Flood Zone	X				
PERMITTING	2.059	▪ ALUC	X				
PERMITTING	2.060	▪ Sewer Or Septic Tank	X				
PERMITTING	2.061	▪ Water Well (Y/N)	X				
PERMITTING	2.062	▪ Plan Check Required (Y/N)	X				
PERMITTING	2.063	▪ Required items (i.e., Hazardous Materials, Planning approval, Soil Report, Sewer Fees, Grading plan, etc.)	X				
PERMITTING	2.064	▪ WDID (Waste Discharge Identification) #	X				
PERMITTING	2.065	▪ Department/Division Route	X				
PERMITTING	2.066	▪ Workers Compensation Verification (Y/N)	X				
PERMITTING	2.067	▪ Permit Approval Date	X				
PERMITTING	2.068	▪ Permit Expiration Date	X				
PERMITTING	2.069	▪ Finaled Date	X				
PERMITTING	2.070	▪ Ward (Council Jurisdiction)	X				
PERMITTING	2.071	▪ Work Order Number	X				
PERMITTING	2.072	<b>DIGITAL SIGNATURE FOR CONDITION FORM</b> - Ability to have customer sign permit condition form with digital signature pad at the counter.				X	Custom integration with 3rd party software will be required at implementation
PERMITTING	2.073	<b>UNLIMITED PERMIT TYPES</b> - Provide for the tracking of "unlimited" permit types such as:	X				
PERMITTING	2.074	▪ <b>Building Department</b>					
PERMITTING	2.075	▪ ADU (Accessory Dwelling Units)	X				
PERMITTING	2.076	▪ Addition	X				
PERMITTING	2.077	▪ Alteration/Remodel	X				
PERMITTING	2.078	▪ Building	X				
PERMITTING	2.079	▪ Residential Building	X				
PERMITTING	2.080	▪ Certificate of Occupancy	X				
PERMITTING	2.081	▪ Change of Occupancy	X				
PERMITTING	2.082	▪ Commercial New	X				
PERMITTING	2.083	▪ Conversion	X				
PERMITTING	2.084	▪ Demolition	X				
PERMITTING	2.085	▪ Electrical	X				
PERMITTING	2.086	▪ Fences	X				
PERMITTING	2.087	▪ Mechanical	X				
PERMITTING	2.088	▪ New Construction	X				
PERMITTING	2.089	▪ Photovoltaic Panels	X				
PERMITTING	2.090	▪ Plumbing	X				
PERMITTING	2.091	▪ Remodel	X				

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
PERMITTING	2.092	▪ Repair	X							
PERMITTING	2.093	▪ Reroof	X							
PERMITTING	2.094	▪ Signs	X							
PERMITTING	2.095	▪ Swimming Pool/Spa	X							
PERMITTING	2.096	▪ Tenant Improvements	X							
PERMITTING	2.097	▪ Cell Towers	X							
PERMITTING	2.098	▪ Water Heater	X							
PERMITTING	2.099	▪ <b>Planning Department</b>								
PERMITTING	2.100	▪ Fence Permits	X							
PERMITTING	2.101	▪ Sign Permits	X							
PERMITTING	2.102	▪ Home Occupation	X							
PERMITTING	2.103	▪ Temporary Use	X							
PERMITTING	2.104	▪ Temporary Banners	X							
PERMITTING	2.105	▪ Special Events Permits	X							
PERMITTING	2.106	▪ Film Permits	X							
PERMITTING	2.107	▪ <b>Public Works / Engineering Department</b>								
PERMITTING	2.108	▪ Grading Permits	X							
PERMITTING	2.109	▪ Landscape Permits	X							
PERMITTING	2.110	▪ THR (Traffic Hydrology Stormwater) Permit	X							
PERMITTING	2.111	▪ SWPPP (Stormwater Pollution Prevention Plan)								
PERMITTING	2.112	▪ BMP (Best Management Plan)								
PERMITTING	2.113	▪ WQMP (Water Quality Management Plan)								
PERMITTING	2.114	▪ Swimming Pool Drainage Permit	X							
PERMITTING	2.115	▪ Off Site Improvement Permits	X							
PERMITTING	2.116	▪ Street								
PERMITTING	2.117	▪ Street Lights								
PERMITTING	2.118	▪ Sidewalk								
PERMITTING	2.119	▪ Traffic Signals								
PERMITTING	2.120	▪ Curb and Gutter								
PERMITTING	2.121	▪ Signing and Striping								
PERMITTING	2.122	▪ Wall Permits	X							
PERMITTING	2.123	▪ Retaining								
PERMITTING	2.124	▪ Non-Retaining								
PERMITTING	2.125	▪ Trash Enclosure								
PERMITTING	2.126	▪ Encroachment Permits	X							
PERMITTING	2.127	▪ Haul Permits	X							
PERMITTING	2.128	▪ Single Trip								



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PERMITTING	2.129	▪ Multi-Trip							
PERMITTING	2.130	▪ Wide Load Permits		X					
PERMITTING	2.131	▪ Stockpile Permits		X					
PERMITTING	2.132	▪ Right of Way		X					
PERMITTING	2.133	▪ Dumpster							
PERMITTING	2.134	▪ Utility							
PERMITTING	2.135	▪ Cable							
PERMITTING	2.136	▪ Electric							
PERMITTING	2.137	▪ Telephone							
PERMITTING	2.138	▪ Gas							
PERMITTING	2.139	▪ Sewer							
PERMITTING	2.140	▪ Sidewalk Vendor		X					
PERMITTING	2.141	<b>COMBINATION PERMITS</b> - Ability to setup combination permits (e.g., signs, plumbing, building, electrical, mechanical, pools, etc.) with separate requirements, fees and inspections.		X					
PERMITTING	2.142	<b>ADDITIONAL PERMITS</b> - Ability to add more permit types to an existing building permit application/project.		X					
PERMITTING	2.143	<b>PERMIT MASS CHANGES/ACTIONS</b> - Ability to select multiple permits and apply changes or actions in mass (e.g., update contact information, print permits, etc. ) .		X					
PERMITTING	2.144	<b>BATCH EMAIL NOTIFICATIONS</b> - Ability to batch email permit expiration notices.		X					
PERMITTING	2.145	<b>REQUIRED FIELDS</b> - Ability for Agency to determine which fields are required.		X					
PERMITTING	2.146	<b>PERSON/ENTITY INFORMATION</b> - Persons information entered into database should be retrievable to populate persons information on future applications.		X					
PERMITTING	2.147	<b>PERMIT DATA</b> - Allow for an unlimited number of names, addresses, and phone numbers to be entered for a permit application. If limited, please explain limitation in comments		X					
PERMITTING	2.148	<b>PERMIT APPLICATION CHECKLIST</b> - Ability to create Agency-defined required checklists by permit type.		X					
PERMITTING	2.149	<b>VALID ADDRESSES</b> - Ability for system to require valid Site Location selection for all activities/permits (i.e., no free form address input by end-users).		X					
PERMITTING	2.150	<b>TEMPORARY ADDRESS</b> - Ability to create a temporary address to link new permit applications to.		X					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
PERMITTING	2.151	<b>TEMPORARY PARCEL NUMBERS</b> - Allow assignment of pseudo or temporary parcel numbers to be used for permitting purposes until actual parcel numbers are available from the County.	x					
PERMITTING	2.152	<b>STREET INTERSECTION</b> - Ability to attach permits to a Street and/or Intersection.	x					
PERMITTING	2.153	<b>CLONE PAST PERMITS</b> - Ability to clone past permits (e.g. contractor walking in with 10 re-roof permits at the same time).	x					
PERMITTING	2.154	<b>CREATING MULTIPLE QUANTITIES OF DIFFERENT PERMIT TYPES</b> - Ability to create multiple quantities of different permit types at once (e.g., 5 Patio, 5 Wall, 5 Electrical, and 5 Plumbing permits).	x					
PERMITTING	2.155	<b>PERMIT APPLICATION TO INSPECTION</b> - Ability to prompt an inspection from a permit application.	x					
PERMITTING	2.156	<b>ATTACHMENTS</b> - Ability to attach files to permit (i.e., performance bond/check, emails, etc.).	x					
PERMITTING	2.157	<b>SECURITY</b> - Ability to restrict user access to create temporary/permanent address entries.	x					
PERMITTING	2.158	<b>DATES</b>						
PERMITTING	2.159	<b>PERMIT EXPIRATION DATES</b> - Automatically calculate permit expiration date based on user parameters by type of permit.	x					
PERMITTING	2.160	<b>AUTO ADJUST EXPIRE DATE</b> - Ability to auto adjust permit expiration date by 180 days from last inspection.	x					
PERMITTING	2.161	<b>AUTO DATES FROM STATUS CHANGE</b> -Ability to configure dates to automatically populate based on status changes, such as:	x					
PERMITTING	2.162	▪ Changing status to "Approved" also auto populates Approved Date field	x					
PERMITTING	2.163	▪ Changing status to "Issued" also auto populates Issued Date field	x					
PERMITTING	2.164	▪ Other agency-defined status and date combinations (e.g., CofO, Finaled,	x					
PERMITTING	2.165	<b>CONTRACTORS</b>						
PERMITTING	2.166	<b>CONTRACTOR DATA</b> - Provide database for tracking contractor/architects/engineers/deputy inspectors information including:	x					
PERMITTING	2.167	▪ Name	x					
PERMITTING	2.168	▪ Address	x					
PERMITTING	2.169	▪ Phone	x					
PERMITTING	2.170	▪ Type of contractor	x					
PERMITTING	2.171	▪ Business license certificate	x					
PERMITTING	2.172	▪ Fax number	x					
PERMITTING	2.173	▪ Liability insurance carrier (name, expiration date)	x					
PERMITTING	2.174	▪ Surety Company bond carrier	x					
PERMITTING	2.175	▪ E-mail address	x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
PERMITTING	2.176	▪ Mobile phone number	X					
PERMITTING	2.177	▪ Application date	X					
PERMITTING	2.178	▪ State license number	X					
PERMITTING	2.179	▪ State contractor information and license types	X					
PERMITTING	2.180	▪ State contractor License Expiration Date	X					
PERMITTING	2.181	▪ Agency business license number	X					
PERMITTING	2.182	▪ Agency business license expiration date	X					
PERMITTING	2.183	<b>UNLIMITED COMMENTS AND NOTES</b> - Provide an area for unlimited free-form text comments and notes for each contractor.	X					
PERMITTING	2.184	<b>FLAG CONTRACTORS</b> - Ability to flag individual Contractors as needed, with comments, that alert staff with a notification when a Contractor with a flag is added to a record.	X					
PERMITTING	2.185	<b>CONTRACTOR REQUIREMENTS</b> - Perform automatic checking of Agency-defined contractor requirements for pulling a permit during permit processing.	X					
PERMITTING	2.186	▪ License Number	X					
PERMITTING	2.187	▪ License Classification (i.e. B, C47, C10, etc....)	X					
PERMITTING	2.188	▪ License Status (e.g., Active)	X					
PERMITTING	2.189	▪ City Business License Number	X					
PERMITTING	2.190	▪ City Business License Status (e.g., Active)	X					
PERMITTING	2.191	<b>MULTIPLE CONTRACTORS PER PERMIT</b> - Ability to track multiple contractors per permit and change contractor that did certain aspects of construction (e.g., who did the electrical, plumbing, etc.).	X					
PERMITTING	2.192	<b>MERGE CONTRACTOR RECORDS</b> - Ability to merge contractor records if contractor number changes and also maintain record history.					X	
PERMITTING	2.193	<b>TRACK INSURANCE</b> - Provide capability to track contractor and other vendor's insurance.	X					
PERMITTING	2.194	<b>TRACK INSURANCE</b> - Ability to auto-generate letters to contractor that an updated insurance certificate is needed.	X					
PERMITTING	2.195	<b>TRUST ACCOUNTS</b> - Ability to create and draw down from trust accounts setup by contractor.	X					
PERMITTING	2.196	<b>TRACK AGENCY BUSINESS LICENSE</b> - Provide capability to link to and/or track Agency business license expiration date by contractor.	X					
PERMITTING	2.197	<b>ROUTING &amp; WORKFLOW</b>						
PERMITTING	2.198	<b>WORKFLOW</b> - Ability to pre-establish workflow and task requirements by permit type (reviews, plan checks, verifications, inspections, other agency approval requirements, etc.).	X					
PERMITTING	2.199	<b>MODIFY WORKFLOW</b> - Ability to modify workflow and task requirements as needed at the permit record.	X					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PERMITTING	2.200	<b>DEFAULT DUE DATES</b> - Ability for system to default due dates by task type (e.g., plan check reviews due within 10 days of submittal).	x						
PERMITTING	2.201	<b>OVERRIDE DUE DATES</b> - Ability to override automatically assigned system due dates.	x						
PERMITTING	2.202	<b>PERFORMANCE STANDARDS TRACKING</b> - Ability to distinguish different task due dates and set due dates accordingly. Each task should have a separate date associated to it in order to compile performance standards reports.	x						
PERMITTING	2.203	<b>SIMULTANEOUS WORKFLOW STEPS</b> - Ability to allow review steps to be performed simultaneously by multiple users/departments.	x						
PERMITTING	2.204	<b>ASSIGN TASKS TO STAFF</b> - Ability for departments to assign and re-assign tasks to specific staff.	x						
PERMITTING	2.205	<b>ASSIGN TASKS TO DEPARTMENT</b> - Ability to either assign staff or leave task completion at the department level.	x						
PERMITTING	2.206	<b>CALENDAR VIEW OF ASSIGNMENTS AND DUE DATES</b> - Ability for users and supervisors to view their assignments and due dates by individual or department.	x						
PERMITTING	2.207	<b>PERMIT REVISIONS</b> - Ability to revise permit applications during the permit review process.	x						
PERMITTING	2.208	<b>NOTES TYPE AND DATE STAMP</b> - Ability to add notes and comments throughout the permitting process, including type and date stamp.	x						
PERMITTING	2.209	<b>APPROVALS</b> - Do not allow permit to be issued until all required plan review steps are completed.	x						
PERMITTING	2.210	<b>CUSTOM FIELDS ENTRY</b> - Ability to automatically update workflow based on responses provided in custom fields during the application process.	x						
PERMITTING	2.211	<b>CONFIRMATION OF WORKFLOW ASSIGNMENT</b> - Ability to automatically notify an Applicant and Staff that a new assignment has been received.	x						
PERMITTING	2.212	<b>PLAN REVIEWS AND COMMENTS</b>							
PERMITTING	2.213	<b>AGENCY DEFINED ROUTING</b> - Allow Agency-defined plan review routing based on type of work performed to multiple users/departments (e.g., specific staff, planning, environmental compliance, fire, police, county health, engineering, etc.).	x						
PERMITTING	2.214	<b>OUTSIDE AGENCY ROUTING</b> - Allow Agency-defined plan review routing based on type of work performed to multiple <b>non-agency</b> users/outside agencies (e.g., Environmental Health, Health Department, Waste Water, etc.).	x						
PERMITTING	2.215	<b>MULTIPLE PERMITS PER SET OF APPROVAL STEPS/PLAN CHECK</b> - Ability to setup one set of approval steps/plan checks for multiple permits (e.g., building, plumbing, electrical, mechanical, etc.).	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PERMITTING	2.216	<b>PLAN STAMP</b> - Ability for a user to electronically stamp plans						X	
PERMITTING	2.217	<b>PLAN POSSESSION</b> - Ability to track which planners have been issued sets of physical plans.	X						
PERMITTING	2.218	<b>ELECTRONIC PLAN REVIEW</b> - Capable of online plan review with ability to markup plans and add comments.	X						Accela provides Adobe as a standard mark up tool. In addition to Adobe, the solution can integrate with any 3rd party mark up tool.
PERMITTING	2.219	<b>STANDARD COMMENTS</b> - Allow for Agency-defined table of standard comments that can be accessed during plan review.	X						
PERMITTING	2.220	<b>UNLIMITED COMMENTS</b> - Allow for entry of unlimited free-form notes and comments during the plan review processes.	X						
PERMITTING	2.221	<b>UNLIMITED COMMENT CHARACTERS</b> - Allow for an unlimited number of characters in a comment.	X						The solution provides a limit of 4000 characters but is not unlimited
PERMITTING	2.222	<b>PRINT PLAN CHECK COMMENTS</b> - Ability to print plan check comments on plan check review letter.	X						
PERMITTING	2.223	<b>COMBINED COMMENT LETTERS</b> - Ability to combine department comment letters for issuance with the permit documents.	X						
PERMITTING	2.224	<b>EDITABLE COMMENT REVIEW LETTERS</b> - Ability to create editable comment/review letters			X				The review letter can be exported as a word document that can be editable. Additionally, the comment on the permit is editable
PERMITTING	2.225	<b>ADD CORRECTION ITEMS</b> - Allow entry of plan correction items as part of plan review.	X						
PERMITTING	2.226	<b>CORRECTIONS LIST</b> - Ability to generate a review specific or overall corrections list.	X						
PERMITTING	2.227	<b>CUSTOMER CORRECTIONS LIST</b> - Ability for system to generate a corrections list (letter) for customer.	X						
PERMITTING	2.228	<b>CORRECTION NOTICE COMMENTS</b> - Ability to combine all plan review comments and correction requirements into a single correction notice.	X						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application		Comments
PERMITTING	2.229	<b>EDITABLE PLAN CORRECTION LETTER</b> - Ability for system to generate an editable plan corrections letter that merges appropriate record information.	x					The review letter can be exported as a word document that can be editable. Additionally, the comment on the permit is editable
PERMITTING	2.230	<b>AUTOMATIC REMINDERS</b> - Ability to set automatic reminders/notifications based on plan review phases (e.g. preliminary plan review date, expected date of completion, etc.).	x					
PERMITTING	2.231	<b>PLAN REVIEW SUBMISSIONS</b> - Ability to identify and track multiple rounds of plan reviews. (i.e. 1st round, 2nd round, etc.)	x					
PERMITTING	2.232	<b>PLAN REVIEW DUE DATES</b> - Ability to setup different due dates based on the round submission (i.e. 1st round is due within 3 weeks, 2nd round is due within 2 weeks, etc.)	x					
PERMITTING	2.233	<b>CONDITIONS OF APPROVAL</b>						
PERMITTING	2.234	<b>SPECIAL CONDITIONS</b> - Ability to note any restrictions or special conditions established by reviewing departments as a prerequisite within the permit process.	x					
PERMITTING	2.235	<b>STANDARD CONDITIONS</b> - Ability to set up standard conditions of approval by permit type.	x					
PERMITTING	2.236	<b>CHECKLIST COMPLIANCE</b> - Ability for system to force all conditions of approval to be met and checked off before user is allowed to mark a task complete.	x					
PERMITTING	2.237	<b>TRACKING REVISIONS</b> - Track conditions of approval revisions (who, what, when).	x					
PERMITTING	2.238	<b>APPROVALS MULTI-DEPARTMENT</b> -Allow conditions of approval to be entered and maintained by multiple departments.	x					
PERMITTING	2.239	<b>APPROVAL GROUPING BY DEPARTMENT</b> - Ability to group conditions of approval by department/division.	x					Staff can select from a dropdown the department they belong to for each condition of approval they are issuing on the permit
PERMITTING	2.240	<b>CHECKBOX</b> - Allow conditions of approval "completed" check box.	x					
PERMITTING	2.241	<b>CHECKBOX</b> - Allow conditions of approval "reviewed" check box.	x					
PERMITTING	2.242	<b>TRACKING</b> - Track conditions of approval "completed by whom".	x					
PERMITTING	2.243	<b>TRACKING</b> - Track conditions of approval "reviewed by whom".	x					
PERMITTING	2.244	<b>TRACKING</b> - Track conditions of approval completed by "date and time".	x					
PERMITTING	2.245	<b>TRACKING</b> - Track conditions of approval "reviewed" by date and time.	x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
PERMITTING	2.246	<b>FEES</b>						
PERMITTING	2.247	<b>UNLIMITED FEES AND TYPES</b> - Provide for calculation of standard fees with effective dates using Agency-provided formulas or tables.	x					
PERMITTING	2.248	<b>FEE SCHEDULE EFFECTIVE DATE</b> - Ability to effective date fee schedules in advance.	x					
PERMITTING	2.249	<b>PAY FOR MULTIPLE PERMITS</b> - Ability to pay for multiple permits in the same transaction.	x					
PERMITTING	2.250	<b>FEES AND CREDITS</b> - Track fees charged, refunds, and credits issued by customers, permits, parcel, project, etc.	x					
PERMITTING	2.251	<b>FIXED AND VARIABLE FEES</b> - Ability to set up Agency-defined fixed and variable fees as follows:	x					
PERMITTING	2.252	▪ Flat \$XX fee per valuation tier (e.g., \$XX for valuation tier \$0-\$1,000, \$XX for tier \$1,001-\$2,000, etc.)	x					
PERMITTING	2.253	▪ Flat \$XX fee per valuation tier (see above), plus an additional flat fee per valuation unit (e.g., valuation over \$100,000 is \$XX per \$1,000 additional valuation, etc.)	x					
PERMITTING	2.254	▪ Building Permit - plan review fees XX% of Building Permit fee (e.g. XX% of base fee)	x					
PERMITTING	2.255	▪ Additional Hourly Building Permit - plan review fees (revisions/changes). Minimum	x					
PERMITTING	2.256	▪ Flat fee times number of units (e.g., total number of lots)	x					
PERMITTING	2.257	▪ Flat \$XX fee per unit tiers, plus an additional flat fee per unit over the highest tier	x					
PERMITTING	2.258	<b>PERCENTAGE OF OTHER FEES</b> - Ability to calculate fees based as a percentage of other fees.	x					
PERMITTING	2.259	<b>ADMINISTRATIVE FEE</b> - Ability to calculate an administrative fee that is based on XX% of the total fees.	x					
PERMITTING	2.260	<b>MULTI-CRITERIA FEE CALCULATIONS</b> - Ability to calculate fees based on multiple values (e.g., Diameter 8" or less and depth of 50' or less).	x					
PERMITTING	2.261	<b>BUILDING CONSTRUCTION VALUATION</b> - Allow for Agency-defined valuation calculations based on a Agency-defined table of construction values.	x					
PERMITTING	2.262	<b>BUILDING ASSESSED VALUATION</b> - Allow for Agency-defined valuation calculations based on a Agency-defined assessed values.	x					
PERMITTING	2.263	<b>SQUARE FOOT CALCULATIONS</b> - Allow Agency-defined square footage calculations based on a Agency-defined table of square footage values.	x					
PERMITTING	2.264	<b>FEES ON DEMAND</b> - Ability to charge any or all fees by specific project requirements (e.g., set up fees on demand).	x					
PERMITTING	2.265	<b>MISCELLANEOUS FEES</b> - Ability to calculate and track unlimited miscellaneous fees collected in conjunction with building permits.	x					



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
PERMITTING	2.266	<b>WAIVE FEES</b> - Ability to waive or override any standard/default fees by supervisor with proper security control.	x							
PERMITTING	2.267	<b>PERMIT REQUEST ESTIMATES</b> - Ability to save permit request information to estimate fees without creating a new permit application, then convert estimate to application records when customer actually submits formal permit application (could be weeks or months later).	x							
PERMITTING	2.268	<b>PAY FOR MULTIPLE PERMITS</b> - Ability to pay for multiple permits in the same transaction.	x							
PERMITTING	2.269	<b>AUTO-CALCULATE FEES</b> - Calculate standard planning fees using Agency-defined criteria in a table structure.	x							
PERMITTING	2.270	<b>BILLABLE TIME</b> - Ability to track task time by person and generate hourly fees due.	x							
PERMITTING	2.271	<b>FEE SETTINGS FOR CANCELLED PERMITS</b> - Ability to set fees as refundable or non-refundable should a permit be cancelled.	x							
PERMITTING	2.272	<b>PERMIT CANCELCATION</b> - Ability to automatically refund only XX% of the original permit fees if the permit application is cancelled by the customer.	x							
PERMITTING	2.273	<b>INVOICING</b> - Ability to generate an invoice for specific fees due on a permit.	x							
PERMITTING	2.274	<b>INVOICING MULTIPLE PERMITS OR WORK ORDERS</b> - Ability to generate an invoice for all unpaid fees due on multiple permits/work orders by associated contact on the permit.	x							
PERMITTING	2.275	<b>FEE DIFFERENCE CALCULATIONS</b> - Ability to adjust square footage/valuation and calculate the increase in fees of fees already paid.	x							
PERMITTING	2.276	<b>FEE DECIMAL PLACES</b> - Provide for tracking of up to four decimal places in Fees and Fee Formulas, (i.e. SMIP 0.0021 x Job Value, SMIP 0.0001 x Job Value, etc.)	x							
PERMITTING	2.277	<b>FEE SCHEDULES</b>								
PERMITTING	2.278	<b>MULTIPLE ACTIVE FEE SCHEDULES</b> - Ability for multiple fee schedules to be active at the same time (e.g., Agency-wide fee schedule and a developer specific fee schedule).	x							
PERMITTING	2.279	<b>DEFAULT FEE SCHEDULE</b> - Ability to specify default fee schedule (e.g., Agency).	x							
PERMITTING	2.280	<b>MASS FEE CHANGES</b> - Ability to mass change all or a select set of fees by xx% (inflationary) once per year without having to change each individual fee.	x							
PERMITTING	2.281	<b>DEPOSITS</b>								
PERMITTING	2.282	<b>TIME TRACKING</b> - Ability to track hourly time spent by reviewer and task to calculate fees for deposit draw downs.	x							
PERMITTING	2.283	<b>DEPOSIT CREDITS/REFUNDS</b> - Ability to allow specific authorized users to generate a credit for hours billed.	x							



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
PERMITTING	2.284	<b>DEPOSIT CREDITS/REFUNDS</b> - Ability to credit back draw-downs and expenses to the developer's deposit (e.g., collected newspaper notification fee by mistake) .	x					
PERMITTING	2.285	<b>REFUNDABLE DEPOSITS</b> - Ability to track deposits and refunds including conditions and sign-offs of refund, and maintain a real-time permit fees balance.	x					
PERMITTING	2.286	<b>MULTIPLE PERMITS DRAWS PER DEPOSIT</b> - Ability for multiple permits to draw down against the same deposit (e.g., large contractor or utility company).	x					
PERMITTING	2.287	<b>DEPOSIT INVOICE - FEE SUMMARY</b> - Ability for deposit invoice to show amounts paid to-date and a summary of fees incurred by fee type.	x					
PERMITTING	2.288	<b>BONDS</b>						
PERMITTING	2.289	<b>BOND ASSESSMENT</b> - Ability to track cash sureties, Letters of Credit, CDs, and other forms of Bonds - Data fields to be tracked include:	x					
PERMITTING	2.290	▪ Bond amount	x					
PERMITTING	2.291	▪ Bond payment type (e.g., cash, check, credit card, letter of credit, cd, etc.)	x					
PERMITTING	2.292	▪ Bond assessment date	x					
PERMITTING	2.293	▪ Bond release date	x					
PERMITTING	2.294	▪ Notes	x					
PERMITTING	2.295	<b>BOND RELEASE</b> - Ability to release a bond and track release amount and release date.	x					
PERMITTING	2.296	<b>NOTIFICATIONS</b>						
PERMITTING	2.297	<b>NOTIFICATION METHODS</b> - Notification methods include:	x					
PERMITTING	2.298	▪ E-mail	x					
PERMITTING	2.299	▪ Online Citizen Access Portal Updates	x					
PERMITTING	2.300	▪ Mail (e.g., Word-formatted letters)	x					
PERMITTING	2.301	<b>AUTO EMAIL CONTACT TYPES BY STATUS</b> - Ability to automatically generate email notices to contact types by status (e.g., owner and applicant for permit approval, developer when permit status is temporary certificate of occupancy, etc.).	x					
PERMITTING	2.302	<b>NOTIFICATION LETTERS</b> - Ability to generate 30 or 90 day expiration notification letter for a permit applicant.	x					
PERMITTING	2.303	<b>EMAIL NOTIFICATION LETTERS</b> - Ability to email expiration notification letters.	x					
PERMITTING	2.304	<b>NOTIFICATIONS WITH ATTACHMENTS</b> - Ability for standard notifications/letters/permits, certificates, etc., to print with pre-determined attachments (batch or on-demand).	x					
PERMITTING	2.305	<b>NOTIFICATION QUEUE</b> - Ability to notify via queue when inspections are final approved for certificate of occupancy issuance.	x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PERMITTING	2.306	<b>BATCH PRINT PERMIT EXPIRATION NOTICES</b> - Ability to print permit expiration notices in batch for mailing 30 days before expiration.	x						
PERMITTING	2.307	<b>REQUEST FOR PAYMENT</b> - Ability to automatically generate emails to an applicant when fees are ready to be paid.	x						
PERMITTING	2.308	<b>DOCUMENTS TO SIGN</b> - Ability to automatically distribute an email to an applicant containing documents to be signed electronically.				x			Accela can send out email with the attachments. Custom integration is required with 3rd party document e-signature solution
PERMITTING	2.309	<b>PLAN SUBMITTALS AND RESUBMITTALS</b> - Ability for the system to notify plan reviewers/departments of new plan submittals or resubmittals and review due dates.	x						
PERMITTING	2.310	<b>PLAN REVIEWS COMPLETED</b> - Ability for a permit technician to be notified of when all plan reviews have been completed.	x						
PERMITTING	2.311	<b>PAYMENT MADE</b> - Ability for a permit technician to be notified of when payments are made online.	x						
PERMITTING	2.312	<b>LOCK-HOLDS</b>							
PERMITTING	2.313	<b>LOCK INDIVIDUAL PERMIT</b> - Ability to lock an individual permit (e.g., no edits allowed until lock lifted).	x						
PERMITTING	2.314	<b>LIFT LOCK</b> - Allow only authorized users to lift a locked permit.	x						
PERMITTING	2.315	<b>ALERTS</b>							
PERMITTING	2.316	<b>UNLIMITED ALERTS</b> - Ability to place unlimited number of alerts per parcel.	x						
PERMITTING	2.317	<b>FLASH ALERTS</b> - Ability to flash alerts by address (e.g., outstanding code enforcement violations).	x						
PERMITTING	2.318	<b>EXPIRED STATE LICENSE</b> - Ability for the system to automatically provide the user an alert when entering an application for a contractor that has an expired state license.	x						
PERMITTING	2.319	<b>EXPIRED AGENCY LICENSE</b> - Ability for the system to automatically provide the user an alert when entering an application for a contractor that has an expired agency license.	x						
PERMITTING	2.320	<b>PERMIT STOP WORK NOTICE</b> - Ability to issue a stop work notice for the following items:	x						
PERMITTING	2.321	▪ Fees Due/NSF	x						
PERMITTING	2.322	▪ Outstanding Code Enforcement Violations (e.g., Illegal Work)	x						
PERMITTING	2.323	▪ Contractor with Expired Business License	x						
PERMITTING	2.324	▪ Contractor with Expired State License	x						
PERMITTING	2.325	▪ Contractor with Expired Insurance	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
PERMITTING	2.326	<b>PERMIT NOTICE ALERT</b> - Ability to generate a permit notice alert on a property whenever a permit, planning, code or licensing record is opened.	x					
PERMITTING	2.327	<b>FEES DUE ALERT</b> - Provide an alert at Certificate of Occupancy issuance of any fees owed by the developer/owner/contractor.	x					
PERMITTING	2.328	<b>PRINTING</b>						
PERMITTING	2.329	<b>AGENCY-DEFINED PERMIT LAYOUT</b> - Ability to create an Agency-defined permit layout.	x					
PERMITTING	2.330	<b>FINAL EDITS</b> - Perform editing prior to printing notices/letters for such items as all fees paid, all permits final, etc.	x					
PERMITTING	2.331	<b>PRINT CERTIFICATES</b> - Allow Agency to define type of certificate to print (e.g., Certificate of Completion vs. Certificate of Occupancy).	x					
PERMITTING	2.332	<b>PRINT AND ATTACH</b> - Ability to simultaneously print and attach a document to a permit record.	x					
PERMITTING	2.333	<b>REPORTING</b>						
PERMITTING	2.334	<b>SEARCH FUNCTIONS</b> - Allow for search and retrieval of a permit or application data using any combination of:	x					
PERMITTING	2.335	▪ Job Address	x					
PERMITTING	2.336	▪ Tract Number	x					
PERMITTING	2.337	▪ Parcel Map Number	x					
PERMITTING	2.338	▪ Parcel number	x					
PERMITTING	2.339	▪ Lot number	x					
PERMITTING	2.340	▪ Associated names (applicant, property owner, contractor, architect)	x					
PERMITTING	2.341	▪ Associated mailing addresses (applicant, property owner, contractor, architect)	x					
PERMITTING	2.342	▪ Associated phone numbers (applicant, property owner, contractor, architect)	x					
PERMITTING	2.343	▪ Contractor license no.	x					
PERMITTING	2.344	▪ Contractor business license no.	x					
PERMITTING	2.345	▪ Permit Number	x					
PERMITTING	2.346	▪ Type of application (Permit Type)	x					
PERMITTING	2.347	▪ Receipt No.	x					
PERMITTING	2.348	▪ Application date	x					
PERMITTING	2.349	▪ Permit issuance date	x					
PERMITTING	2.350	▪ Application status	x					
PERMITTING	2.351	▪ Responsible department	x					
PERMITTING	2.352	▪ Various Wild Card search	x					
PERMITTING	2.353	▪ Partial word searches	x					
PERMITTING	2.354	▪ Ward (Council Districts)	x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
PERMITTING	2.355	▪ Permit Sub Type	X							
PERMITTING	2.356	▪ Number of Inspections in a Month	X							
PERMITTING	2.357	▪ Ability to search by owner name or business common name (e.g., Safeway or Home Owners Association) and see all associated permits.	X							
PERMITTING	2.358	<b>HISTORY</b> - Ability to show all permit history by address when entering application information.	X							
PERMITTING	2.359	<b>USER DASHBOARD</b> - Provide a user specific dashboard with statistics and assignments.			X					
PERMITTING	2.360	<b>STATISTICAL REPORTS</b> - Statistical reports of permits issued by a Agency-defined date range.			X					
PERMITTING	2.361	<b>STATISTICAL REPORTS</b> - Statistical reports of the types of applications submitted by Agency-defined date range.			X					
PERMITTING	2.362	<b>STATISTICAL REPORTS</b> - Statistical reports of plan review processing, including numbers of applications processed, average days to process, etc.			X					
PERMITTING	2.363	<b>OPEN TRUST/DEPOSIT REPORT</b> - Reports of open bonds/deposits and associated activity.			X					
PERMITTING	2.364	<b>PERMIT EXPIRATION REPORT</b> - Permit expiration reports with option to print letters for expiring permits.			X					
PERMITTING	2.365	<b>PLAN CORRECTION REPORT</b> - Produce a plan correction listing on-demand.			X					
PERMITTING	2.366	<b>PLAN CHECK AGING REPORT</b> - Produce a plan check aging report with in and due dates by reviewer.			X					
PERMITTING	2.367	<b>OPEN INSPECTIONS REPORT</b> - Report that lists all open inspections by Agency-defined date range by assigned inspector.			X					
PERMITTING	2.368	<b>PERMIT FEE REPORT</b> - Provides permit fee reports by daily receipts.			X					
PERMITTING	2.369	<b>CALIFORNIA SMIP REPORT</b> - Ability to produce a report containing the SMIP fees collected.			X					
PERMITTING	2.370	<b>CALIFORNIA GREEN FEE REPORT</b> - Ability to produce a report containing the Green Fees collected.			X					
PERMITTING	2.371	<b>TIME PERIOD REPORTS</b> - Provide reports by any time period (e.g., specific date to specific date).			X					
PERMITTING	2.372	<b>PDF FORMAT</b> - Ability to save reports in PDF format.			X					
PERMITTING	2.373	<b>SUMMARY REPORT</b> - Ability to generate a summary of applied and issued permits per month, comparing current month to same time previous year, year to date permits, and annual totals.			X					
PERMITTING	2.374	<b>MONTHLY PERMITS ISSUED REPORT</b> - Ability to generate a detailed list all permits issued for the month.			X					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
PERMITTING	2.375	<b>REVENUE EXPENSES REPORT</b> - Monthly revenue/expense report (fees minus contract review/inspections costs).			X			
PERMITTING	2.376	<b>PUBLISH REPORTS ON WEBSITE</b> - Ability to publish reports to website (e.g., monthly list of permits issued).	X					
PERMITTING	2.377	<b>HOLDING PERIODS BY PARTY</b> - Ability to generate a report on the number of days a permit process has been in the hands of the Agency vs. the applicant (e.g., Agency took X days to review plans and applicant took X days to schedule an inspection after being issued a permit, etc.).			X			
PERMITTING	2.378	<b>PLAN REVIEWS/SUBMITTALS BY PERMIT</b> - Ability to produce a report of all the plan reviews and submittals that have been completed for a permit.			X			
PERMITTING	2.379	<b>ELECTRONICALLY SUBMITTED PLANS</b> - Ability to report on the number of electronically submitted plans.			X			
PERMITTING	2.380	<b>INTEGRATION - INTERFACE</b>						
PERMITTING	2.381	<b>ELECTRONIC PLAN SUBMITTAL</b> - Ability to receive plan submittals electronically through an online portal.				X		
PERMITTING	2.382	<b>ELECTRONIC PLAN REVIEW</b> - Capable of online plan review with ability to redline markup plans and add comments.				X		
PERMITTING	2.383	<b>INTEGRATION - STATE LICENSES BOARD</b> - Ability to extract contractor information from the state licenses board and populate fields in permit modules and contractor database. <b>VENDOR NOTE</b> - Integration should go beyond the State Licenses Board home page.	X					Accela has a standard integration for the State of California Licensing Board
PERMITTING	2.384	<b>INTEGRATE - BUSINESS LICENSES</b> - Ability to integrate with business licensing module to identify if a developer has an active business license.	X					
PERMITTING	2.385	<b>INTEGRATION - CASH RECEIPTS</b> - Cash receipts should validate permit number, account number, fees, penalty amounts, and update customer balance.	X					
PERMITTING	2.386	<b>INTEGRATION- PLANNING</b> - Provide communication of conditions and other pertinent information from planning and zoning projects related to permit property locations.	X					
PERMITTING	2.387	<b>INTEGRATION - COUNTY ASSESSORS</b> - Ability to access County Assessor records directly within the application.				X		Custom integration with 3rd party software will be required at implementation
PERMITTING	2.388	<b>INTEGRATION - GENERAL LEDGER</b> - The permits application must generate journal entry exports to the general ledger for any invoices generated and revenues received, including all fees and credits.				X		Custom integration with 3rd party software will be required at implementation
PERMITTING	2.389	<b>INTEGRATION - ACCOUNTS RECEIVABLE</b> - Ability to integrate to the Agency's financial system ( <b>New World Systems</b> ) to allow billing of permit and other permit- related fees (e.g., billing applicants for 3rd party reviews).				X		Custom integration with 3rd party software will be required at implementation

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
PERMITTING	2.390	<b>INTEGRATION - ACCOUNTS PAYABLE</b> - Ability to export fee and deposit account refunds to the Agency's financial system ( <i><b>New World Systems</b></i> ).						x	Custom integration with 3rd party software will be required at implementation
PERMITTING	2.391	<b>INTEGRATION - PARCEL/ADDRESS MANAGEMENT</b> - The parcel/address management application should provide address, intersection, parcel, owner, and zoning information to the permit system.	x						
PERMITTING	2.392	<b>INTEGRATION - ESRI ARCGIS</b> - Ability to interface to GIS mapping products that support ESRI formats, including ArcGIS ( <i><b>Version 10.8</b></i> ).	x						
PERMITTING	2.393	<b>INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM</b> -Ability to integrate with a third-party document management system ( <i><b>Laserfiche</b></i> ) to attach and store files or supporting documents to a record (e.g., plan blueprints, CAD images, logs, COA narratives, etc.).						x	Custom integration with 3rd party software will be required at implementation

# City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

## Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Cost	Comments
<b>Inspections</b>								
<b>GENERAL INSPECTIONS</b>								
INSPECTIONS	3.001	<b>AGENCY-DEFINED FIELDS</b> - Provide for "unlimited" Agency-defined fields based on inspection type. <i>VENDOR NOTE - If limited, please explain in Comments field.</i>	x					
INSPECTIONS	3.002	<b>LINKING TO PERMITS</b> - Ability to link to a permit or project, after the inspection has been completed.	x					
INSPECTIONS	3.003	<b>UNLIMITED PUNCH LIST</b> - Ability to setup unlimited inspection punch list fields by inspection type.	x					
INSPECTIONS	3.004	<b>ASSOCIATE STANDARD COMMENTS TO INSPECTION TYPE</b> - Ability for standard comments for inspection to be specific to the type of inspection being done.	x					
INSPECTIONS	3.005	<b>INSPECTION SEQUENCES</b> - Allow for the setup of Agency-defined inspections sequences for each application based on the type of work (e.g., foundation before framing).	x					
INSPECTIONS	3.006	<b>ALTER INSPECTION SEQUENCES</b> - Ability to alter inspection sequences for individual permits as required.	x					
INSPECTIONS	3.007	<b>GENERAL SCHEDULING</b>						
INSPECTIONS	3.008	<b>SCHEDULING - TIME CUTOFF</b> - Ability for system to cut off daily inspection scheduling at "X:XX" time each day.	x					
INSPECTIONS	3.009	<b>SCHEDULING - MAX INSPECTIONS CUTOFF</b> - Ability for system to cut off daily inspection scheduling when a maximum number of inspections have been received.	x					
INSPECTIONS	3.010	<b>VALIDATE INSPECTION REQUEST</b> - System to check whether an inspection request is valid (e.g., required or previously completed).	x					
INSPECTIONS	3.011	<b>SCHEDULING ERROR CHECKS</b> - Perform Agency-defined error checking (with ability to override) during inspection scheduling to ensure the following:	x					



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
INSPECTIONS	3.012	Valid contractor license	X						
INSPECTIONS	3.013	Inspections are being performed in the proper sequence	X						
INSPECTIONS	3.014	Type of inspection requested is valid for the permit	X						
INSPECTIONS	3.015	All required fees have been paid	X						
INSPECTIONS	3.016	Permit has not expired	X						
INSPECTIONS	3.017	Permit has not been placed on hold	X						
INSPECTIONS	3.018	<b>MASS INSPECTION SCHEDULING</b> - Ability to reschedule inspections in mass by type with the ability to override (e.g., reschedule entire day's inspections due to rain).	X						
INSPECTIONS	3.019	<b>RECURRING INSPECTIONS</b> - Ability to setup recurring daily inspections (e.g., site inspections, annual day care inspections, fire inspections, etc.).	X						
INSPECTIONS	3.020	<b>INSPECTIONS CALENDAR</b> - Ability to choose on which days inspections are allowed to take place (e.g., inspections on weekends, no inspections every other Friday, etc.).	X						
INSPECTIONS	3.021	<b>CAP DAILY INSPECTIONS BY INSPECTOR</b> - Ability to cap the number of inspections assigned to an inspector for a day.	X						
INSPECTIONS	3.022	<b>INSPECTION UNIT VALUES</b> - Ability to assign unit values to inspections and limit the daily value of inspections an inspector can be assigned.	X						
INSPECTIONS	3.023	<b>SPECIFIC INSPECTOR ASSIGNMENT OVERRIDE</b> - Ability to assign a default inspector for a specific permit that overrides all other inspector assignment rules (e.g., John will be the only inspector performing inspections for this specific permit).	X						
INSPECTIONS	3.024	<b>PRE-ASSIGN INSPECTORS BY LOCATION</b> - Ability to automatically assign inspectors by location (e.g., 3 different inspections in same area should get assigned to the same inspector).	X						
INSPECTIONS	3.025	<b>PRE-ASSIGN INSPECTORS BY POINT SYSTEM</b> - Ability to automatically assign inspections by point complexity system.					X		
INSPECTIONS	3.026	<b>PRE-ASSIGN INSPECTOR BASED ON INITIAL INSPECTION ASSIGNMENT</b> - Ability to automatically assign second and remaining inspections to the inspector assigned to the first inspection.					X		
INSPECTIONS	3.027	<b>INSPECTION ASSIGNMENTS - DRAG &amp; DROP</b> - Ability to assign and reassign inspections to inspectors using a drag-and-drop capabilities.						X	
INSPECTIONS	3.028	<b>INSPECTORS WORK QUEUE</b> - Ability for inspectors to work from a screen showing only their assigned inspections (i.e., queue).	X						
INSPECTIONS	3.029	<b>INSPECTOR CALENDARS</b> - Ability to view a Daily, Weekly, or Monthly calendar for an inspector.	X						
INSPECTIONS	3.030	<b>DAILY CALENDAR COMPARISON</b> - Ability to compare the daily calendars for multiple inspectors.	X						



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
INSPECTIONS	3.031	<b>INSPECTION REASSIGNMENT</b> - Provide a method of automatically reassigning an inspector's scheduled inspections for such situations as an inspector calling in sick, vacation, meetings, etc. <i>VENDOR NOTE - Should prevent inspections from being assigned to an inspector that is out.</i>	x						
INSPECTIONS	3.032	<b>OVERRIDE ASSIGNMENT</b> - Allow specified users to override the automatic assignment.	x						
INSPECTIONS	3.033	<b>OVERDUE ROLLOVER</b> - Ability for inspections assignment to roll-over uncompleted inspections to the next day's schedule.	x						
INSPECTIONS	3.034	<b>CANCEL INSPECTIONS</b> - Ability to allow inspections to be canceled.	x						
INSPECTIONS	3.035	<b>CANCEL INSPECTIONS CUTOFF</b> - Ability to set an Inspection Cancel Cutoff Day and Time; (i.e. same day by 6:00am)	x						
INSPECTIONS	3.036	<b>LATE CANCELLATION FEE</b> - Ability to charge a late cancel fee automatically if cancel occurs after the cutoff defined.	x						
INSPECTIONS	3.037	<b>SCHEDULING APPROVALS</b>							
INSPECTIONS	3.038	<b>APPROVALS</b> - Do not allow inspections to be scheduled without proper approvals or completed prerequisites.	x						
INSPECTIONS	3.039	<b>FINAL INSPECTION APPROVAL</b> - Ability to disallow final inspection to be scheduled if all other approvals are not completed and fees paid.	x						
INSPECTIONS	3.040	<b>APPROVAL FOR INSPECTION OUTSIDE OF BUSINESS HOURS</b> - Ability to require Agency approval for inspection requests that are outside of normal business hours.	x						
INSPECTIONS	3.041	<b>INSPECTION WINDOWS</b>							
INSPECTIONS	3.042	<b>AGENCY DEFINED INSPECTION WINDOW</b> - Ability to schedule an inspection time window.	x						
INSPECTIONS	3.043	<b>AM/PM INSPECTION</b> - Ability to automatically schedule inspections for a morning or afternoon time window.	x						
INSPECTIONS	3.044	<b>INSPECTIONS REQUESTS - TIME WINDOWS</b> - Ability to schedule inspection requests for specific time windows (e.g. 8:00am, 1:30pm).	x						
INSPECTIONS	3.045	<b>INSPECTION TIME WINDOWS</b> - Ability to specify the inspection scheduling time window (e.g., hourly or AM/PM) by inspection type.	x						
INSPECTIONS	3.046	<b>PRECON INSPECTIONS</b> - Ability to setup workflow to restrict which days specific Inspection Types can be scheduled. (e.g., Preconstruction Inspections can only be scheduled on a Tuesdays or Thursdays)	x						
INSPECTIONS	3.047	<b>AFTERHOURS INSPECTION REQUESTS</b> - Ability to setup workflow to allow the scheduling of Afterhours Inspection Requests by Inspection Types, GIS areas and Geo Type. (e.g., only allow ROW Inspection Type, in the Historic District, on an Intersection the ability to request Afterhours Inspections)	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
INSPECTIONS	3.048	<b>AFTERHOURS INSPECTION FEE</b> - Ability to setup workflow to automatically add and collect an Afterhours Fee if an Afterhours Inspection is Requested. (e.g., If a contractor requests to schedule an Afterhours Inspection, as part of the scheduling process the system would automatically add the Afterhours Fee to the cart and request the contractor to pay the fee prior to confirming the Inspection was scheduled)	x						
INSPECTIONS	3.049	<b>HOLDS AND NOTIFICATIONS</b>							
INSPECTIONS	3.050	<b>NOTICE OF VIOLATION</b> - Ability to initiate violations and generate notification letters by type of violation.	x						
INSPECTIONS	3.051	<b>STOP WORK ORDER</b> - Ability to issue stop work order (e.g., prevent other inspections, permits, etc.) on any open permit.	x						
INSPECTIONS	3.052	<b>INSPECTION HOLD STATUS</b> - Ability to put project on hold if additional inspection or re-inspection fees are due.	x						
INSPECTIONS	3.053	<b>UNAPPROVED CONDITIONS TO BLOCK PERMIT ISSUANCE</b> - Ability to set up some types of conditions to be changed to unapproved during project construction to block additional permits from being issued until condition is re-inspected and removed (e.g., job site safety issues, construction sign, fencing, straw rolls requirement, etc.).	x						
INSPECTIONS	3.054	<b>OVERDUE INSPECTION FLAG</b> - Ability for inspectors queue to flag any inspections not completed in 24 hours.	x						
INSPECTIONS	3.055	<b>MULTIPLE INSPECTIONS AT SAME ADDRESS</b> - Ability for the system to notify an inspector of multiple scheduled inspections at the same address.	x						
INSPECTIONS	3.056	<b>INSPECTION REQUESTOR NOTIFICATIONS</b> - Ability for the system to automatically notify inspection requestors at the end of each day of upcoming inspections by inspection times or time windows.	x						
INSPECTIONS	3.057	<b>FEES</b>							
INSPECTIONS	3.058	<b>AFTER HOURS FEE</b> - The system has the ability to calculate fees for inspections outside of normal business hours.	x						
INSPECTIONS	3.059	<b>AUTO FEE BY INSPECTION RESULT STATUS</b> - Ability to automatically assess a fee based on an inspection result status (e.g., failed with fee, not ready with fee, etc.).	x						
INSPECTIONS	3.060	<b>RE-INSPECTION FEES</b> - Ability to manually or automatically apply a discretionary re-inspection fee after x number of inspections of the same type.	x						
INSPECTIONS	3.061	<b>OVERRIDE RE-INSPECTION FEES</b> - Allow Agency-defined re-inspection fees to be overridden by specified users.	x						
INSPECTIONS	3.062	<b>TIME TRACKING</b>							
INSPECTIONS	3.063	<b>INSPECTION TIME TRACKING</b> - Ability to track and report the following inspection date and time attributes:	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
INSPECTIONS	3.064	■ Inspection Date	X						
INSPECTIONS	3.065	■ Inspection Start Time	X						
INSPECTIONS	3.066	■ Inspection Stop Time	X						
INSPECTIONS	3.067	■ Inspection Total Time	X						
INSPECTIONS	3.068	<b>PRE-DEFINED INSPECTION DURATION TIMES</b> - Ability to set pre-defined inspection duration times (e.g., 0.5 hours) with the ability for an inspector to manually override.	x						
INSPECTIONS	3.069	<b>MOBILE INSPECTIONS</b>							
INSPECTIONS	3.070	<b>SUGGESTED ROUTE</b> - Ability to view a suggested route for inspections.						x	Suggested route is available in the back office GIS map viewer. Inspectors can print this route map
INSPECTIONS	3.071	<b>MANUAL ROUTE</b> - Ability to manually modify a suggested route for inspections.						x	
INSPECTIONS	3.072	<b>FIELD INSPECTIONS</b> - Ability to add inspections to a list that is retrievable by an inspector already in the field.	x						
INSPECTIONS	3.073	<b>INSPECTION RESULTS COMMENTS ! NOTES</b> - Allow unlimited additional inspection notes, free text comments or result comments to be entered during inspection results entry.	x						
INSPECTIONS	3.074	<b>PREVIOUS INSPECTION COMMENTS ! NOTES</b> - Ability to copy notes from previously completed inspection of the same type into the new inspection being added.	x						
INSPECTIONS	3.075	<b>INSPECTION SCHEDULING</b> - Ability for an inspector to schedule an inspection or reinspection from the field.	x						
INSPECTIONS	3.076	<b>VIEW PERMIT RECORD ATTACHMENTS</b> - Ability to view attachments from the permit record while in the field.	x						
INSPECTIONS	3.077	<b>VIEW ELECTRONIC PLANS</b> - Ability to view electronic plans associated with a permit while in the field.	x						
INSPECTIONS	3.078	<b>VIEW PREVIOUS INSPECTIONS</b> - Ability to view all previous inspections associated with a permit while in the field.	x						
INSPECTIONS	3.079	<b>PUNCH LIST - FREE-FORM COMMENTS</b> - Ability to enter unlimited inspector comments (free form punch list).	x						
INSPECTIONS	3.080	<b>VOICE-TO-TEXT FOR INSPECTIONS</b> - Ability to support voice-to-text for recording inspection comments.	x						
INSPECTIONS	3.081	<b>MOBILE PHOTO ! DOCUMENT ATTACHING</b> - Allow inspectors in the field to attach photos and documents to an inspection record in real-time using a laptop or other hand held devices such as smartphones or tablets.	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
INSPECTIONS	3.082	<b>MOBILE RESULTING</b> - Allow inspectors in the field to result inspections in real-time using laptops or other hand held devices such as smartphones or tablets (e.g., iPads or Windows based tablets).	x					
INSPECTIONS	3.083	<b>VIEW DETAILED PERMIT INFO</b> - Ability to view detailed permit information from the field for any permit (e.g., Confirm if permit exists for suspicious construction, permit has been issued, inspections have been performed, etc.) regardless if an inspection was scheduled for the permit.		x				
INSPECTIONS	3.084	<b>DIGITAL SIGNATURE</b> - Ability to enable digital signature capture in the field.		x				
INSPECTIONS	3.085	<b>OFFLINE MOBILE FUNCTIONALITY</b> - Ability to support "Store-And-Go" functionality by saving transaction data locally when connectivity is lost and synchronizing the data once connectivity is restored.		x				
INSPECTIONS	3.086	<b>REACTIVE MOBILE DESIGN</b> - Ability to run mobile application on cellular devices and tablets.		x				
INSPECTIONS	3.087	<b>EMAILS</b>						
INSPECTIONS	3.088	<b>EMAIL SCHEDULED CONFIRMATION</b> - Ability to automatically send an Inspection Scheduled Email Confirmation to the contractor or contact on the permit when an Inspection is scheduled.		x				
INSPECTIONS	3.089	<b>EMAIL INSPECTION RESULTS</b> - Ability to automatically email inspection results and comments to the permit/project customer point of contact.		x				
INSPECTIONS	3.090	<b>EMAIL INSPECTION RESULTS</b> - Ability to manually email inspection results and comments to the permit/project customer point of contact and manually enter their email address from the mobile device.		x				
INSPECTIONS	3.091	<b>FINAL INSPECTION COMPLETED EMAIL</b> - The system has the ability to automatically send an email to all personnel involved with a permit indicating that the final inspection has been completed.		x				
INSPECTIONS	3.092	<b>CANCELLED INSPECTION EMAIL</b> - Ability for an automatic email to be sent when an Inspection is Cancelled.		x				
INSPECTIONS	3.093	<b>REPORTING</b>						
INSPECTIONS	3.094	<b>INSPECTION TIME</b> - Ability to report on the actual time spent performing inspections.			x			
INSPECTIONS	3.095	<b>INSPECTIONS PERFORMED BY DATE RANGE</b> - Ability to report on the type of inspections performed for a Agency-defined date range.			x			
INSPECTIONS	3.096	<b>% OF INSPECTIONS REQUESTED AND RESULTED SAME DAY</b> - Ability to report on the percentage of inspections requested and resulted on the same day.			x			
INSPECTIONS	3.097	<b>PASSED/FAILED INSPECTIONS BY PERMIT</b> - Ability to report on all inspections that have passed and failed by permit.			x			
INSPECTIONS	3.098	<b>REINSPECTION FEES BY PERMIT</b> - Ability to report on all re-inspection fees by permit			x			

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
INSPECTIONS	3.099	<b>DAILY INSPECTION REQUEST LOG</b> - Ability to generate a detailed list of all inspection requests received for a given day.			x				
INSPECTIONS	3.100	<b>STATISTICAL REPORTS</b> - Statistical reports of types of inspections performed by Agency-defined date range.			x				
INSPECTIONS	3.101	<b>STATISTICAL REPORTS</b> - Statistical reports of inspector activity by Agency-defined date range.			x				
INSPECTIONS	3.102	<b>INTEGRATION</b>							
INSPECTIONS	3.103	<b>INTEGRATION - IVR</b> - Ability to integrate with an interactive voice response system for inspection scheduling, status updates, and payments. <i>VENDOR NOTE - Please list IVR partners in comments.</i>				x			Custom integration with 3rd party software will be required at implementation
INSPECTIONS	3.104	<b>INTEGRATION - PERMITTING</b> - Integrate in real time to Permitting to schedule inspections and update inspection results to the permit.	x						
INSPECTIONS	3.105	<b>INTEGRATION - PERMIT APPROVAL</b> - Integrate in real-time to Permitting to update inspection results to the permit and approve the permit.	x						
INSPECTIONS	3.106	<b>INTEGRATION - PERMIT FINAL</b> - Integrate in real-time to Permitting to update inspection results to the permit and final the permit.	x						
INSPECTIONS	3.107	<b>INTEGRATION - CODE ENFORCEMENT</b> - Integrate in real time to Code Enforcement to create a case, schedule inspections, and update inspection results for a case.	x						
INSPECTIONS	3.108	<b>INTEGRATION - BUSINESS LICENSING</b> - Integrate in real time to Business Licensing to schedule inspections and update inspection results to the license.	x						
INSPECTIONS	3.109	<b>INTEGRATION - PARCEL/ADDRESS MANAGEMENT</b> -Integrate in real time to Parcel/Address Management to retrieve historical information on inspections performed on the parcel or address.	x						
INSPECTIONS	3.110	<b>INTEGRATION - PARCEL/ADDRESS MANAGEMENT</b> - The parcel/address management application should provide address, parcel, intersection, owner, and zoning information to the permit system.	x						
INSPECTIONS	3.111	<b>INTEGRATION - ESRI ARCGIS</b> - Ability to interface to GIS mapping products that support ESRI formats, including ArcGIS ( <i>Version 10.8</i> ).	x						
INSPECTIONS	3.112	<b>INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM</b> -Ability to integrate with a third-party document management system ( <i>Laserfiche</i> ) to attach and store files or supporting documents to a record (e.g., plan blueprints, CAD images, logs, COA narratives, etc.).				x			Custom integration with 3rd party software will be required at implementation

## City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

### Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Comments
<b>Code Enforcement</b>								
<b>CASE SETUP AND INTAKE</b>								
CODE ENF.	4.001	<b>WORKFLOW BY CASE TYPES</b> - Allow user to define case types with Agency-defined sequence of actions, site investigation, follow up, re-discovery, fees, and due dates for each type.	x					
CODE ENF.	4.002	<b>AGENCY-DEFINED FIELDS</b> - Provide for "unlimited" Agency-defined fields by case type. If limited, please explain in comments.	x					
CODE ENF.	4.003	<b>CASE STATUS</b> - Ability to define numerous different status codes (i.e., new, pending, resolved, etc.) and be able to retrieve and print a report on cases matching a particular status.	x					
CODE ENF.	4.004	<b>PREVENT DUPLICATES</b> - Ability for system to identify duplicate complaints and prevent a separate case from being opened.					x	
CODE ENF.	4.005	<b>CASE MERGING</b> - Ability to merge duplicate cases already created.					x	
CODE ENF.	4.006	<b>CASE TRACKING</b>						
CODE ENF.	4.007	<b>CASE TRACKING</b> - Ability to track code cases by the following fields:	x					
CODE ENF.	4.008	▪ Case Type	x					
CODE ENF.	4.009	▪ Date Investigation began	x					
CODE ENF.	4.010	▪ Violation address	x					
CODE ENF.	4.011	▪ Owner information	x					
CODE ENF.	4.012	▪ Tenant information	x					
CODE ENF.	4.013	▪ Business Management information	x					
CODE ENF.	4.014	▪ Property Owner/Tenant notifications (e.g., Site visit, phone call, second	x					
CODE ENF.	4.015	▪ All Site Investigations	x					
CODE ENF.	4.016	▪ Date/Time of Site Investigations	x					
CODE ENF.	4.017	▪ Officers	x					
CODE ENF.	4.018	▪ Violation(s) corrected (Y/N)	x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
CODE ENF.	4.019	▪ Actions Taken	X					
CODE ENF.	4.020	▪ Date Actions Taken	X					
CODE ENF.	4.021	▪ Comments	X					
CODE ENF.	4.022	<b>CASE CONTACTS</b> - Ability to track unlimited number and category of contacts per case (e.g., owners, business owner, tenant, property manager, reporting party, etc.).	X					
CODE ENF.	4.023	<b>CASE ASSOCIATIONS</b> - Ability to associate multiple complaints to a single case.	X					
CODE ENF.	4.024	<b>TRACKING CRITERIA</b> - Provide capability to track case-related events by date, time, status, and code enforcement officer, etc.	X					
CODE ENF.	4.025	<b>TIME TRACKING</b> - Ability to track time by case, task, site investigation, or event for billing purposes.	X					
CODE ENF.	4.026	<b>TRACK CASE UPDATES BY PERSON</b> - Ability to track all case update information by person (e.g., a case could have multiple site investigations done by different case officers).	X					
CODE ENF.	4.027	<b>CASE DATES</b> - Ability to auto populate milestone dates based on printed documents.	X					
CODE ENF.	4.028	<b>CASE CHRONOLOGY</b> - Ability to track all case chronology through narrative notes and type of action. <i>VENDOR NOTE - All narrative notes and actions should be maintained in date/time order (latest on top).</i>	X					
CODE ENF.	4.029	<b>UNLIMITED FREE-FORM NARRATIVE NOTES</b> - Provide ability to enter unlimited, free-form notes per violation.	X					
CODE ENF.	4.030	<b>DATE AND TIME STAMP NARRATIVE NOTES</b> - Ability to select the date and time stamp when inputting site investigation notes, case notes, etc., by user.	X					
CODE ENF.	4.031	<b>MAINTAIN AUDIT TRAILS</b> - Ability to maintain audit trails including changed by, changed date, and record of changes.	X					
CODE ENF.	4.032	<b>VIOLATIONS</b>						
CODE ENF.	4.033	<b>VIOLATION TYPES</b> - Ability to track violation types, including, but not limited to:	X					
CODE ENF.	4.034	▪ Construction without a Permit	X					
CODE ENF.	4.035	▪ Commercial Enforcement	X					
CODE ENF.	4.036	▪ Multi-Family Rental Program	X					
CODE ENF.	4.037	▪ Hazardous Condition	X					
CODE ENF.	4.038	▪ Marijuana Dispensary	X					
CODE ENF.	4.039	▪ NOP Request	X					
CODE ENF.	4.040	▪ Property Maintenance	X					
CODE ENF.	4.041	▪ Single Family Rental Program	X					
CODE ENF.	4.042	▪ Residential	X					



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
CODE ENF.	4.043	▪ Sub-Standard Housing	X					
CODE ENF.	4.044	▪ Vehicle Abatement	X					
CODE ENF.	4.045	▪ Vendor Enforcement	X					
CODE ENF.	4.046	▪ Vacant Lot	X					
CODE ENF.	4.047	▪ Yard Sale	X					
CODE ENF.	4.048	<b>VIOLATION TYPES</b> - Allow user to define violation types (vehicle, commercial site maintenance, signage, illegal vendor, overgrown vegetation, trash cans in public view, etc.).	X					
CODE ENF.	4.049	<b>AGENCY MUNICIPAL CODE SECTIONS</b> - Ability to apply Agency Municipal Code Sections to violations.	X					
CODE ENF.	4.050	<b>CODE SECTIONS BY VIOALTION TYPE</b> - Ability to pre-define and automatically populate code sections by violation type.	X					
CODE ENF.	4.051	<b>REQUIRED ACTIONS BY VIOLATION TYPE</b> - Ability to pre-define and automatically populate required actions by violation type.	X					
CODE ENF.	4.052	<b>COMMENTS BY VIOLATION TYPE</b> - Ability to set up standard violation comments by violation type.	X					
CODE ENF.	4.053	<b>COMPLIANCE BY DATE BY VIOLATION TYPE</b> - Ability to set up standard compliance by date by type of violation.	X					
CODE ENF.	4.054	<b>MULTIPLE VIOLATIONS PER CASE</b> - Allow multiple violations to be associated with a single case.	X					
CODE ENF.	4.055	<b>CASE ASSIGNMENTS</b>						
CODE ENF.	4.056	<b>ASSIGN CASE BY CASE TYPE</b> - Ability to automatically assign cases to code officers by case type.	X					
CODE ENF.	4.057	<b>ASSIGN CASE BY GEOGRAPHICAL AREA</b> -Ability to automatically assign cases to code officers by geographical area (e.g. zone 1-4).	X					
CODE ENF.	4.058	<b>ASSIGN CASE OVERWRITE</b> - Ability to overwrite automatic code case assignment with proper user permissions.	X					
CODE ENF.	4.059	<b>AUTO EMAIL FOR CASE ASSIGNMENT</b> - Ability for an automatic email to be sent to the code enforcement officer who is assigned to the code case.	X					
CODE ENF.	4.060	<b>SITE INVESTIGATION CHECKLIST BY CASE TYPE</b> - Ability to generate site investigation checklists by case type.	X					
CODE ENF.	4.061	<b>CASE MANAGEMENT</b>						
CODE ENF.	4.062	<b>DUE DATES</b> - Ability for system to fill in due dates by task based upon case type.	X					
CODE ENF.	4.063	<b>DUE DATE OVERRIDE</b> - Ability to override system generated default dates (e.g., correction/compliance, site investigations, etc.).	X					
CODE ENF.	4.064	<b>RESOLUTION EFFECTIVE DATES</b> - Allow user to define number of days for resolution with effective dates by violation type.	X					



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
CODE ENF.	4.065	<b>ACTIONS WITH EFFECTIVE DATES</b> - Allow user to define violation related actions with effective dates.	x						
CODE ENF.	4.066	<b>CASE STATUS BY EFFECTIVE DATES</b> - Ability to track dates status' changed.	x						
CODE ENF.	4.067	<b>SITE INVESTIGATIONS (INSPECTIONS)</b>							
CODE ENF.	4.068	<b>UNLIMITED SITE INVESTIGATION FREE-FORM TEXT</b> - Allow unlimited free-form text at the site investigation level.	x						
CODE ENF.	4.069	<b>FOLLOW-UP SITE INVESTIGATION</b> - Establish Agency-defined follow-up site investigation program to ensure corrections are made.	x						
CODE ENF.	4.070	<b>RE-DISCOVERY SCHEDULING</b> - Ability to automatically schedule re-discovery by XX days if case is not in compliance.	x						
CODE ENF.	4.071	<b>ANNUAL OR BIENNIAL SITE INVESTIGATION</b> - Ability to setup annual or every other year site investigation of rental properties to determine if code violations exists.	x						
CODE ENF.	4.072	<b>SITE INVESTIGATION DATE</b> - Ability to modify automatic/default site investigation and/or re-discovery dates.	x						
CODE ENF.	4.073	<b>CORRESPONDENCE</b>							
CODE ENF.	4.074	<b>USER DEFINED NOTIFICATIONS</b> - Allow user to define formats for correspondence, notifications, letters, etc., by type of violation (without vendor customization).			x				
CODE ENF.	4.075	<b>Agency-DEFINED CORRESPONDENCE/NOTICE FORM LAYOUT</b> - Print notifications on forms created in Microsoft Word or other Agency-defined form layout (e.g., door hangers).			x				
CODE ENF.	4.076	<b>MULTIPLE ADDRESS VIOLATION LETTER</b> - Ability to create and print violation letters to both the actual situs address and owner's mailing address if different than the situs address.			x				
CODE ENF.	4.077	<b>MAILING LABELS</b> - Ability to produce mailing labels for a Agency-defined group of cases.			x				
CODE ENF.	4.078	<b>EDITABLE CORRESPONDENCE/NOTICATIONS</b> - Utilizing forms created in Microsoft Word or other Agency-defined form layout, allow user to edit standard forms (e.g. notifications, correspondence, etc.).	x						
CODE ENF.	4.079	<b>SPELL CHECKING NARRATIVE NOTES</b> - Provide spell checking capabilities for all narrative notes and forms/letter editors.	x						
CODE ENF.	4.080	<b>MICROSOFT WORD</b> - Utilize current versions of Microsoft Word as notice, letter, and citation editor.	x						
CODE ENF.	4.081	<b>MICROSOFT OUTLOOK</b> - Ability for the system to integrate with Microsoft Outlook to attach e-mails to the code case record.				x			

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
CODE ENF.	4.082	<b>VIOLATION NOTIFICATIONS</b> - Provide Agency-defined violation notification to multiple responsible parties (e.g., owners, property manager and/or occupants).			X			
CODE ENF.	4.083	<b>MULTIPLE VIOLATIONS LETTERS PER PROPERTY</b> - Ability to consolidate multiple violations for the same property into one notification letter.			X			
CODE ENF.	4.084	<b>ALERTS &amp; NOTIFICATIONS</b>						
CODE ENF.	4.085	<b>LOCATION ALERTS</b> - Ability to provide on-screen alerts when dealing with certain addresses (e.g., problem property information, hazardous materials on property, dangerous dog, etc.).	X					
CODE ENF.	4.086	<b>INTAKE FLAG</b> - Ability to flag upon intake, if existing open Code Enforcement case(s) exist.	X					
CODE ENF.	4.087	<b>PROPERTY HOLD</b> - Place a hold on property to prevent permit issuance without code enforcement case resolution.	X					
CODE ENF.	4.088	<b>COLLECTIONS LIENS AND COURT</b>						
CODE ENF.	4.089	<b>LOCK CASE NOTES AND COMMENTS</b> - Ability to prevent changes to prior case information, including notes and comments.	X					
CODE ENF.	4.090	<b>PROPERTY LIENS</b> - Ability to view a property lien that has been levied against a property.	X					
CODE ENF.	4.091	<b>COURT EVIDENCE FORMAT</b> - Provide court-accepted evidentiary rules and trail for violation notices, free-form notes, and all attachments.	X					
CODE ENF.	4.092	<b>CASE INFORMATION PACKET</b> - Ability to create a case information packet that automatically prints all historical case information and related attachments.			X			
CODE ENF.	4.093	<b>WARRANT</b> - Ability for the system to generate a Warrant Template to be printed from a case.			X			
CODE ENF.	4.094	<b>COURT CASE RESULTS</b> - Ability to track the results of court cases.	X					
CODE ENF.	4.095	<b>FEES</b>						
CODE ENF.	4.096	<b>MULTIPLE CITATIONS DIFFERENT FINES</b> - Ability to issue multiple types of citations with different fines for a single case.	X					
CODE ENF.	4.097	<b>INCREMENTAL FEES</b> - Ability to assess penalties on an increment basis (e.g. \$100, \$250, \$500) until violation is resolved.	X					
CODE ENF.	4.098	<b>FIXED AND VARIABLE FEES</b> - Ability to set up Agency-defined fixed and variable fees as follows:	X					
CODE ENF.	4.099	▪ Hourly fee by labor or equipment class/type. One hour minimum charge.	X					
CODE ENF.	4.100	▪ Flat fee plus actual cost of abatement or contracted work	X					
CODE ENF.	4.101	▪ Flat \$XX fee per unit	X					
CODE ENF.	4.102	<b>HOURLY FEES</b> - Ability to bill hourly fees.	X					
CODE ENF.	4.103	<b>FEE PAYMENT</b> - Ability to require payment in full within X number of days.	X					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
CODE ENF.	4.104	<b>PENALTIES</b> - Ability to automatically assess a dollar amount penalty if fees are not paid by the due date.	x						
CODE ENF.	4.105	<b>WAIVE FEES &amp; PENALTIES</b> - Ability to waive fees and penalties	x						
CODE ENF.	4.106	<b>MOBILE ACCESS</b>							
CODE ENF.	4.107	<b>INTEGRATION - PUBLIC MOBILE APPLICATION</b> - Ability for the public to submit a request through a mobile application. <i>VENDOR NOTE - Indicate if application requires third party integration or is a current standard feature.</i>						x	
CODE ENF.	4.108	<b>USE OF LAPTOP IN THE FIELD</b> - Ability to run entire system on laptop with a wireless connection while in the field.	x						
CODE ENF.	4.109	<b>REPORTING AND PRINTING</b>							
CODE ENF.	4.110	<b>CASE SEARCH</b> - Ability to locate a case by case number, violation type, address, owner, parcel number, etc.	x						
CODE ENF.	4.111	<b>COMPLIANCE BY DATE BY PRINTED DOCUMENT ISSUED</b> - Ability to set up standard compliance by date by type of Notice.	x						
CODE ENF.	4.112	<b>NAME SEARCH</b> - Provide ability to locate a case by any name associated with the case.	x						
CODE ENF.	4.113	<b>TRACK HISTORY</b> - Ability to track and report case history, including adjudication and judgment information.	x						
CODE ENF.	4.114	<b>HISTORY BY PERSON/ENTITY</b> - Provide code violation history by person/entity.	x						
CODE ENF.	4.115	<b>HISTORY BY PARCEL AND ADDRESS</b> - Provide history of code violations by parcel and address.	x						
CODE ENF.	4.116	<b>DAILY SITE INVESTIGATIONS REPORT</b> - Ability to automatically generate a daily listing of site investigations for all officers.			x				
CODE ENF.	4.117	<b>CODE CASES BY TYPES</b> - Ability to report on the number of code enforcement cases by type and Agency-defined period of time.			x				
CODE ENF.	4.118	<b>CASE INVESTIGATIVE REPORT</b> - Ability to run a standard investigation report (or modify a standard report with Ad Hoc tools) that will include: master case information, complaint description, reporting party information, property information, party-complained-of information, business-complained-of information, revenue, referral information, and all chronological narrative notes.			x				
CODE ENF.	4.119	<b>AVERAGE DAYS FROM INITIATION TO FIRST SITE INVESTIGATION</b> -Ability to report on the average number of calendar days from date of case initiation until the first site investigation is completed.			x				
CODE ENF.	4.120	<b>AVERAGE DAYS FROM FIRST SITE INVESTIGATION TO COMPLIANCE</b> -Ability to report on the Average number of calendar days from first site investigation date until compliance.			x				

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
CODE ENF.	4.121	<b>AVERAGE DAYS FROM INITIATION TO COMPLIANCE</b> -Ability to report on the Average number of calendar days from case initiation to case compliance.			x			
CODE ENF.	4.122	<b>WIRELESS PRINTING FROM LAPTOP</b> - Ability to print violation notices, on location, from wireless printers.	x					
CODE ENF.	4.123	<b>ADMINISTRATIVE CITATIONS EXPORT</b> - Ability to export a list of administrative citations to a 3rd Party collection company.	x					
CODE ENF.	4.124	<b>SECURITY</b>						
CODE ENF.	4.125	<b>SECURITY</b> - Ability to restrict write access to Code Enforcement case by user and group.	x					
CODE ENF.	4.126	<b>SECURITY</b> - Ability to restrict read access of complainant information to Code Enforcement Officers.	x					
CODE ENF.	4.127	<b>FIELD LEVEL SECURITY RESTRICTIONS</b> - Ability to restrict specific fields or group of fields to specific users (e.g., social security numbers, driver's license, numbers, birth dates, etc.).	x					
CODE ENF.	4.128	<b>INTEGRATION</b>						
CODE ENF.	4.129	<b>INTEGRATION - CASHIERING</b> - Ability to integrate with cashiering for payment processing.			x			
CODE ENF.	4.130	<b>INTEGRATION - PERMITTING</b> - Provide ability to flag parcels with code violations to notify building permits system at permit application entry.	x					
CODE ENF.	4.131	<b>INTEGRATION - PERMITTING</b> - Ability to put permit process on hold if a code violation warrants such action.	x					
CODE ENF.	4.132	<b>INTEGRATION - PLANNING</b> - Ability to put a planning/entitlement project on hold if a code violation warrants such action.	x					
CODE ENF.	4.133	<b>INTEGRATION - PLANNING</b> - Ability to put a planning/entitlement project on hold if a code violation warrants such action.	x					
CODE ENF.	4.134	<b>INTEGRATION - MOBILE APPLICATION - ATTACHMENTS</b> -Ability to submit photos and a mobile phone request.	x					
CODE ENF.	4.135	<b>INTEGRATION - PARCEL/ADDRESS MANAGEMENT</b> -Integrate in real time to Parcel/Address Management to retrieve historical information on inspections performed on the parcel or address.	x					
CODE ENF.	4.136	<b>INTEGRATION - PARCEL/ADDRESS MANAGEMENT</b> - The parcel/address management application should provide address, parcel, owner, and zoning information to the permit system.	x					
CODE ENF.	4.137	<b>INTEGRATION - ESRI ARCGIS</b> - Ability to interface to GIS mapping products that support ESRI formats, including ArcGIS ( <b>Version 10.8</b> ).	x					
CODE ENF.	4.138	<b>INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM</b> -Ability to integrate with a third-party document management system ( <b>Laserfiche</b> ) to attach and store files or supporting documents to a record (e.g., plan blueprints, CAD images, logs, COA narratives, etc.).			x			

# City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

## Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Comments
<b>Request Management</b>								
<b>GENERAL FEATURES</b>								
REQUEST MGT.	5.001	<b>REQUEST TYPES</b> - Ability to manage request types such as: requests, complaints, suggestions, compliments by location, and name of requestor.	x					
REQUEST MGT.	5.002	<b>ONLINE REQUESTS</b> - Ability to receive service requests from an online portal.	x					
REQUEST MGT.	5.003	<b>ANONYMOUS WEB PAGE REQUESTS</b> - Ability to receive anonymous service requests.	x					
REQUEST MGT.	5.004	<b>ONLINE STATUS</b> - Ability for a requestor to inquire online and see the status of their request/complaint.	x					
REQUEST MGT.	5.005	<b>E-MAIL REQUESTS</b> - Ability to receive service requests via e-mail.	x					
REQUEST MGT.	5.006	<b>COMPLAINT FIELDS</b> - Ability to track the following fields, at minimum, for any work request:	x					
REQUEST MGT.	5.007	▪ Corrective Type Requested	x					
REQUEST MGT.	5.008	▪ Standard Description	x					
REQUEST MGT.	5.009	▪ Priority	x					
REQUEST MGT.	5.010	▪ Date	x					
REQUEST MGT.	5.011	▪ Requestor Type (Employee, Customer, Business)	x					
REQUEST MGT.	5.012	▪ Requestor Employee Department	x					
REQUEST MGT.	5.013	▪ Requestor Employee Number	x					
REQUEST MGT.	5.014	▪ Requestor Name	x					
REQUEST MGT.	5.015	▪ Requestor Address	x					
REQUEST MGT.	5.016	▪ Requestor Home Phone	x					
REQUEST MGT.	5.017	▪ Requestor Work Phone	x					
REQUEST MGT.	5.018	▪ Requestor Cell Phone	x					
REQUEST MGT.	5.019	▪ Requestor Email Address	x					
REQUEST MGT.	5.020	▪ Work Request Number	x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
REQUEST MGT.	5.021	▪ Work Management Number (IWorqs reference number)	X						
REQUEST MGT.	5.022	▪ Completed/Closed Date	X						
REQUEST MGT.	5.023	▪ Location (if different than address)	X						
REQUEST MGT.	5.024	▪ Park	X						
REQUEST MGT.	5.025	▪ Detailed Description	X						
REQUEST MGT.	5.026	▪ Ward (automatically populated based on GIS location)	X						
REQUEST MGT.	5.027	▪ Date Assigned	X						
REQUEST MGT.	5.028	▪ Assigned To	X						
REQUEST MGT.	5.029	▪ Initial Action Taken	X						
REQUEST MGT.	5.030	▪ Follow-Up Required	X						
REQUEST MGT.	5.031	▪ Assigned to/Call #	X						
REQUEST MGT.	5.032	▪ Follow-Up Action Taken	X						
REQUEST MGT.	5.033	▪ Follow-Up Completion Date	X						
REQUEST MGT.	5.034	▪ Requestor Notified	X						
REQUEST MGT.	5.035	▪ Requestor Notification Date	X						
REQUEST MGT.	5.036	▪ Requestor Notification Performed By	X						
REQUEST MGT.	5.037	▪ Reviewed By	X						
REQUEST MGT.	5.038	▪ Reviewed By Date	X						
REQUEST MGT.	5.039	<b>PERSON/ENTITY</b> - Person/Entity should provide for the storage of the following information at a minimum:	X						
REQUEST MGT.	5.040	▪ Name of Requestor	X						
REQUEST MGT.	5.041	▪ Name of Agency Contact	X						
REQUEST MGT.	5.042	▪ Date of Request	X						
REQUEST MGT.	5.043	▪ Time of Request	X						
REQUEST MGT.	5.044	▪ Forward Request To	X						
REQUEST MGT.	5.045	▪ Service Area (water, sewer, streets, building/planning, etc.)	X						
REQUEST MGT.	5.046	▪ Location of Complaint	X						
REQUEST MGT.	5.047	▪ Description of complaint	X						
REQUEST MGT.	5.048	▪ Service Action Requested	X						
REQUEST MGT.	5.049	▪ Address of Requestor/Complainant	X						
REQUEST MGT.	5.050	▪ Phone Number	X						
REQUEST MGT.	5.051	▪ Email	X						
REQUEST MGT.	5.052	▪ Determination (Public, Private)	X						
REQUEST MGT.	5.053	▪ Determination Date	X						
REQUEST MGT.	5.054	▪ Follow up Required (Y/N)	X						
REQUEST MGT.	5.055	<b>EVENT HISTORY</b> - Ability to access event history by the event reference for each request.	X						
REQUEST MGT.	5.056	<b>CALL HISTORY SEARCH</b> - Ability to verify calls by searching for call history.						X	

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
REQUEST MGT.	5.057	<b>CALL HISTORY SEARCH</b> - Ability to verify calls by searching for call history by informant.							X
REQUEST MGT.	5.058	<b>CALL HISTORY SEARCH</b> - Ability to verify calls by searching for call history by location.							X
REQUEST MGT.	5.059	<b>DEFINE REQUEST TYPES BY DEPARTMENT ! DIVISION</b> - Ability to segregate request types by division/department.	X						
REQUEST MGT.	5.060	<b>REQUEST TYPE WORKFLOW</b> - Ability to define workflow based on request type.	X						
REQUEST MGT.	5.061	<b>REQUEST SUB TYPES</b> - Ability to define Sub Types associated with a Request Type.	X						
REQUEST MGT.	5.062	<b>REQUEST TYPES BASED ON GEO LOCATION</b> - Ability to restrict the Request Types allowed based on a Geo Location (i.e., If a Park is selected on a map only certain request types would be available, if an Address in a specific area of the city is selected only certain request types would be available)						X	
REQUEST MGT.	5.063	<b>ASSIGN &amp; DISPLAY PRIORITY</b> - Ability to display requests by priority within department, as well as by global view (all users).	X						
REQUEST MGT.	5.064	<b>COMPLAINT DASHBOARD</b> -Ability to display complaints by officer in a user defined Agency viewed dashboard.			X				
REQUEST MGT.	5.065	<b>REQUEST ROUTING</b> - Provide for the routing of a request to the proper department/employee based on type of request (Agency-defined).	X						
REQUEST MGT.	5.066	<b>ADDITIONAL REFERRALS ! ROUTING</b> - Provide for additional referrals/routing from initial responsible department/employee.	X						
REQUEST MGT.	5.067	<b>ROUTE REQUESTS TO MULTIPLE DEPARTMENTS</b> - Ability to predefine the routing of request/complaint types to the appropriate department/division or individual by type of request and priority.	X						
REQUEST MGT.	5.068	<b>MULTI-REQUESTS PER SAME INCIDENT</b> - Ability to capture and link multiple complaints on the same incident/case (e.g., graffiti, pot hole, down sign, code enforcement complaint, etc.).	X						
REQUEST MGT.	5.069	<b>DUPLICATE REQUESTS PER SAME INCIDENT</b> - Ability to identify duplicate requests for the same issue.						X	
REQUEST MGT.	5.070	<b>CONVERSATION THREAD WITH COMPLAINANT</b> - Ability to send messages or log messages back and forth regarding the issue.	X						
REQUEST MGT.	5.071	<b>CASE CREATION FROM ISSUE</b> - Ability to create a Code Case from a submitted Issue.	X						
REQUEST MGT.	5.072	<b>LINK ISSUE TO EXISTING CASE</b> - Ability to link an Issue to an existing Code Case.	X						
REQUEST MGT.	5.073	<b>MASS STATUS UPDATE</b> - Ability to update status of multiple requests at the same time (e.g., five requests about the same pot hole).	X						



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
REQUEST MGT.	5.074	<b>AUDIT LOG</b> - Ability to view audit log of request/request events, activities, dates, and status. Including the user who logged an activity or issue.	x					
REQUEST MGT.	5.075	<b>ACTIONS &amp; REMINDERS</b> - Ability to establish future actions and reminders associated with requests.	x					
REQUEST MGT.	5.076	<b>NOTIFICATIONS - EMAILS</b> - Provide for the generation of emails to the requestor at the receipt of request/complaint, when action is determined, and when action is completed.	x					
REQUEST MGT.	5.077	<b>E-MAIL</b> - Ability to send email updates or notifications to requestors.	x					
REQUEST MGT.	5.078	<b>TEXT MESSAGE UPDATES</b> - Ability to send Text Message updates or notifications to requestors.				x		
REQUEST MGT.	5.079	<b>ATTACHMENTS</b> - Ability to store attachments to the request history (e.g., photos, correspondence, e-mail, etc.).	x					
REQUEST MGT.	5.080	<b>ATTACHMENTS</b> - Ability for requestors to provide attachments to the request at initial submission as well as after the issue is created (e.g., photos, correspondence, e-mail, etc.).	x					
REQUEST MGT.	5.081	<b>USER-DEFINED CORRESPONDENCE</b> - Provide capability to configure letter templates for generating correspondence on a global basis or by request.	x					
REQUEST MGT.	5.082	<b>REQUEST CLASSIFICATION TYPES</b> - Provide ability to classify any requests using pre-defined criteria.	x					
REQUEST MGT.	5.083	<b>AGENCY-DEFINED FIELDS</b> - Provide ability to create agency-defined additional information based upon request/complaint type (i.e., unlimited user-defined fields by type of request/contact).	x					
REQUEST MGT.	5.084	<b>PRIORITIZE REQUESTS</b> - Ability to prioritize requests/complaints.	x					
REQUEST MGT.	5.085	<b>STANDARD RESPONSE TIMES</b> - Ability to setup standard response time requirements by request type for departmental response compliance and performance measurement tracking.	x					
REQUEST MGT.	5.086	<b>STANDARD RESPONSE TIME PUBLICATION</b> - Ability to display standard response time requirements for display to requestors.	x					
REQUEST MGT.	5.087	<b>E-MAIL ALERTS</b> - Ability to send e-mail alerts to departments/divisions or individuals based upon priority.	x					
REQUEST MGT.	5.088	<b>E-MAIL ALERTS</b> - Ability to provide reminder e-mail alerts if request is not acted upon within the established standard response time.	x					
REQUEST MGT.	5.089	<b>SEARCH CRITERIA</b> - Ability to obtain a request's status by requestor name, reference number, phone number, request type, and location.	x					
REQUEST MGT.	5.090	<b>SEARCH CRITERIA</b> - Ability to inquire using wild cards and close-to logic.	x					
REQUEST MGT.	5.091	<b>AGING SEARCH</b> - Provide inquiry capability for viewing requests based on aging criteria (e.g., requests still open that are "X" number of days beyond established standard response times).				x		



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
REQUEST MGT.	5.092	<b>STATISTICAL REPORTS</b> - Ability to print reports in statistical format.			X				
REQUEST MGT.	5.093	<b>AGENCY-DEFINED REPORT SORTING</b> - Ability to sort reports in agency-defined sequence.			X				Agency can specify sequence of sorting. Reports can be saved in this pre-defined sequence.
REQUEST MGT.	5.094	<b>ESCALATION PRIORITY</b> - Ability to escalate and prioritize status for daytime and off-hours calls.		X					
REQUEST MGT.	5.095	<b>ROUTE QUEUE</b> - Ability to temporarily route queue to others in department pool when primary request is out of office or unavailable.		X					
REQUEST MGT.	5.096	<b>ROUTE QUEUE</b> - Ability to track personnel who received a request.		X					
REQUEST MGT.	5.097	<b>ACCESS SECURITY</b> - Ability to make requests confidential so only certain departments can see certain request types.		X					
REQUEST MGT.	5.098	<b>ACCESS SECURITY</b> - Ability to make certain request information confidential (e.g., VIP, council member, etc.).		X					
REQUEST MGT.	5.099	<b>UPDATE RESTRICTIONS</b> - Ability to restrict update access to certain data fields.		X					
REQUEST MGT.	5.100	<b>INTEGRATION</b>							
REQUEST MGT.	5.101	<b>INTEGRATION - LAND MANAGEMENT</b> - Provide integration to related addresses in the Land/Parcel/Address Management database.		X					
REQUEST MGT.	5.102	<b>INTERFACE - GIS</b> - Provide linkage of requests to ESRI ArcGIS ( <i>Version 10.8</i> ).		X					
REQUEST MGT.	5.103	<b>INTEGRATION - CODE ENFORCEMENT</b> - Provide two-way integration with the Code Enforcement module.		X					
REQUEST MGT.	5.104	<b>INTEGRATION - MOBILE APPLICATION</b> - Provide two-way integration with a platform agnostic mobile application used for complaint submittal and provides other features.						X	Accela does not provide amobile app for complaint submission. But, the front facing portal is responsive design and works on standard browsers and adjusts to screens of varying sizes
REQUEST MGT.	5.105	<b>INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM</b> -Ability to integrate with a third-party document management system ( <i>Laserfiche</i> ) to attach and store files or supporting documents to a record (e.g., plan blueprints, CAD images, logs, COA narratives, etc.).						X	

# City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

## Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
-------------	----------------	---------------------------------	--------------------	-----------------	---------------	-----------------------	---------------------	---------------	----------

## Licensing and Registrations

### MASTER LICENSE RECORD

LICENSING	6.001	<b>MASTER LICENSE RECORD</b> - Provide a Licenses Master Record with a minimum of the following data elements:	x						
LICENSING	6.002	- License Number	X						
LICENSING	6.003	- License type (e.g., home occupation, commercial/industrial, liquor, etc.)	X						
LICENSING	6.004	- License Status	X						
LICENSING	6.005	- Application Date	X						
LICENSING	6.006	- Business Name	X						
LICENSING	6.007	- Doing Business As Name	X						
LICENSING	6.008	- Business Address	X						
LICENSING	6.009	- Parcel Number	X						
LICENSING	6.010	- Mailing Address	X						
LICENSING	6.011	- Business Owner Name	X						
LICENSING	6.012	- Business Owner Phone Number	X						
LICENSING	6.013	- Business Owner Address	X						
LICENSING	6.014	- E-Mail Address	X						
LICENSING	6.015	- Primary Contact Name	X						
LICENSING	6.016	- Primary Contact Phone Number	X						
LICENSING	6.017	- Primary Contract Email Address	X						
LICENSING	6.018	- Building Owner Name	X						
LICENSING	6.019	- Building Owner Phone Number	X						
LICENSING	6.020	- Building Owner Address	X						
LICENSING	6.021	- Building Owner Email	X						
LICENSING	6.022	- No. of employees	X						
LICENSING	6.023	- Zoning classification	X						
LICENSING	6.024	- Nature of Business	X						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
LICENSING	6.025	▪ Start Date	X						
LICENSING	6.026	▪ End Date	X						
LICENSING	6.027	<b>Event Information</b>	<b>X</b>						
LICENSING	6.028	▪ Name of Event	X						
LICENSING	6.029	▪ Event Address/Location	X						
LICENSING	6.030	▪ Event Dates	X						
LICENSING	6.031	▪ Event hours	X						
LICENSING	6.032	<b>Applicant Information</b>	<b>X</b>						
LICENSING	6.033	▪ Applicant Name	X						
LICENSING	6.034	▪ Drivers License Number	X						
LICENSING	6.035	▪ Address	X						
LICENSING	6.036	▪ Date of Birth	X						
LICENSING	6.037	▪ Race	X						
LICENSING	6.038	▪ Mailing Address	X						
LICENSING	6.039	▪ Phone number	X						
LICENSING	6.040	▪ Email Address	X						
LICENSING	6.041	▪ Demographic Data	X						
LICENSING	6.042	▪ Social Security Number	X						
LICENSING	6.043	<b>Business information</b>	<b>X</b>						
LICENSING	6.044	▪ Business Type (Corporation, Partnership, LLC, Proprietor, etc.)	X						
LICENSING	6.045	▪ Business name	X						
LICENSING	6.046	▪ Business Address	X						
LICENSING	6.047	<b>Business Partner Information</b>	<b>X</b>						
LICENSING	6.048	▪ Partner Names	X						
LICENSING	6.049	▪ Drivers License Number	X						
LICENSING	6.050	▪ Address	X						
LICENSING	6.051	▪ Date of Birth	X						
LICENSING	6.052	▪ Race	X						
LICENSING	6.053	▪ Sex (M/F)	X						
LICENSING	6.054	▪ Citizenship	X						
LICENSING	6.055	▪ Place of Birth	X						
LICENSING	6.056	▪ Mailing Address	X						
LICENSING	6.057	▪ Phone number	X						
LICENSING	6.058	▪ Email Address	X						
LICENSING	6.059	▪ Sole Proprietor (Y/N)	X						
LICENSING	6.060	▪ Demographic Data	X						
LICENSING	6.061	▪ Social Security Number	X						
LICENSING	6.062	<b>LICENSE/REGISTRATION TYPES</b> - Ability to setup "unlimited" Agency-defined License Types such as the following, but not limited to:	<b>X</b>						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
LICENSING	6.063	▪ Business Registrations	X					
LICENSING	6.064	▪ Residential Rental (Single Family / Multi / Apartments)	X					
LICENSING	6.065	▪ Commercial Rental	X					
LICENSING	6.066	▪ Retail	X					
LICENSING	6.067	▪ Professional	X					
LICENSING	6.068	▪ Manufacturing	X					
LICENSING	6.069	▪ Sidewalk Vendor	X					
LICENSING	6.070	▪ Home Based Businesses	X					
LICENSING	6.071	▪ Hotels	X					
LICENSING	6.072	▪ Outside Businesses	X					
LICENSING	6.073	▪ Cannabis	X					
LICENSING	6.074	▪ Alarm System Registrations	X					
LICENSING	6.075	▪ Special Events	X					
LICENSING	6.076	▪ Billiards, Pool Hall, Bowling Alleys	X					
LICENSING	6.077	▪ Coin Operated Devices	X					
LICENSING	6.078	▪ Fireworks	X					
LICENSING	6.079	▪ Bingo and Remote Bingo	X					
LICENSING	6.080	▪ Tattoos	X					
LICENSING	6.081	▪ Taxi Cab	X					
LICENSING	6.082	▪ Arcade / Games and Amusement	X					
LICENSING	6.083	▪ Solicitor Permits	X					
LICENSING	6.084	▪ Massage	X					
LICENSING	6.085	▪ Restaurants	X					
LICENSING	6.086	▪ Live Entertainment	X					
LICENSING	6.087	<b>AGENCY-DEFINED FIELDS</b> - Provide "unlimited" Agency-defined fields by license type.	X					
LICENSING	6.088	<b>CONDITIONS OF APPROVAL BY LICENSE TYPE</b> - Ability to set up standard conditions of approval by license type.	X					
LICENSING	6.089	<b>MASTER ACCOUNT COMMENTS</b> - Provide unlimited free-form text at the master license record level.	X					
LICENSING	6.090	<b>CHANGE DBA NAME</b> - Ability to change a "Doing Business As" name without re-processing the application.	X					
LICENSING	6.091	<b>ATTACHMENTS</b> - Ability to scan documents and attach them to the business, person; and/or to the license or tax record.	X					
LICENSING	6.092	<b>FIELD LEVEL SECURITY RESTRICTIONS</b> - Ability to restrict specific fields or group of fields to specific users (e.g., Social Security numbers, driver's license numbers, birth dates, etc.).	X					
LICENSING	6.093	<b>AUTO DATES FROM STATUS CHANGE</b> - Ability to configure dates to automatically populate based on status changes, such as:	X					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
LICENSING	6.094	▪ Changing status to "Licensed" also auto populates Licensed Date field)	x						
LICENSING	6.095	▪ Other agency-defined status and date combinations (e.g., Revoked, Closed, etc.)	x						
LICENSING	6.096	<b>AUTO SET EXPIRATION DATES</b> - Ability to automatically set the expiration date to the next year and the end of the prior month with the ability to override the expiration date if needed .(e.g., if license is issued on 09/15/2023 the expiration date should be automatically set to 08/31/2024).	x						
LICENSING	6.097	<b>TRANSACTION HISTORY</b> - Ability to see all transaction history on a business license including fees paid in the past and notices sent.	x						
LICENSING	6.098	<b>WORKFLOW AND APPROVALS</b>							
LICENSING	6.099	<b>WORKFLOW</b> - Ability to pre-establish workflow and task requirements for license applications (e.g., building and zoning review, certificate of occupancy approval, contact business owner, approval for liquor license, etc.).	x						
LICENSING	6.100	<b>LICENSE REVIEWERS</b> - Ability to assign department reviewers by license type.	x						
LICENSING	6.101	<b>WORKFLOW ROUTING</b> - Automatic routing of license applications through various Agency-defined processes.	x						
LICENSING	6.102	<b>WORKFLOW MODIFICATIONS</b> - Ability to modify workflow and task requirements as needed.	x						
LICENSING	6.103	<b>SIMULTANEOUS WORKFLOW STEPS</b> - Ability to allow review steps to be performed simultaneously by multiple users/departments.	x						
LICENSING	6.104	<b>PREVENT LICENSE ISSUANCE</b> - Ability to prevent the issuance of a license if a linked permit has not been Finaled (e.g., do not issue a business license if the commercial tenant improvement permit has not been Finaled.)	x						
LICENSING	6.105	<b>AUTOMATIC LICENSE ISSUANCE BASED ON FEE CODE</b> - Ability to automatically issue a license if a specific fee code is paid in full on a license.	x						
LICENSING	6.106	<b>INSPECTIONS</b>							
LICENSING	6.107	<b>ONLINE INSPECTION REQUESTS</b> - Ability for customers to submit inspection requests for licenses online.	x						
LICENSING	6.108	<b>INSPECTION SCHEDULING</b> - Ability to schedule and assign inspections to inspectors.	x						
LICENSING	6.109	<b>MOBILE INSPECTIONS</b> - Allow inspectors in the field to result inspections in real-time using laptops or other hand held devices such as smartphones or tablets (e.g., iPads OR Windows based tablets).	x						
LICENSING	6.110	<b>FEES</b>							
LICENSING	6.111	<b>BUSINESS INSIDE/OUTSIDE AGENCY BOUNDARIES</b> - Ability to assign fees to a business based on whether or not it is located within the Agency's boundaries (e.g., outside contractors).	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
LICENSING	6.112	<b>AUTO-CALCULATE FEES</b> - Calculate standard planning fees using Agency-defined criteria in a table structure.	x						
LICENSING	6.113	<b>FEES BY LICENSE TYPE</b> - Ability to apply different license fee calculations by license type.	x						
LICENSING	6.114	<b>FIXED AND VARIABLE FEES</b> - Ability to set up Agency-defined fixed and variable fees as follows:	x						
LICENSING	6.115	▪ Flat fee plus \$XX per additional unit (e.g., employee, movie screens, etc.)	x						
LICENSING	6.116	▪ Flat fee per location	x						
LICENSING	6.117	▪ Flat \$XX fee per type of unit	x						
LICENSING	6.118	▪ Flat \$XX fee per unit tiers, plus an additional flat fee per unit over the highest tier.	x						
LICENSING	6.119	▪ Percentage of Gross Receipts by Classification Type	x						
LICENSING	6.120	<b>STATE FEE</b> - Ability to apply an \$X fee in additional to the Agency's license tax amount.	x						
LICENSING	6.121	<b>PAST DUE</b> - Ability to apply past due amount on any renewals.	x						
LICENSING	6.122	<b>PENALTIES</b> - Ability to apply a X% penalty based on the number of days late. (e.g. if one week late penalty may be 5%, if two weeks late penalty may be 10%, etc.)	x						
LICENSING	6.123	<b>ADJUSTMENTS</b> - Ability to manually adjust over/under payments with audit trail.	x						
LICENSING	6.124	<b>ADJUSTMENT - REASON</b> - The system has the ability to provide a "Reason Code" field that includes all reasons for a fee adjustment.	x						
LICENSING	6.125	<b>RETROACTIVE LICENSE FEE</b> - Ability to retroactively charge a business license fee for prior years.	x						
LICENSING	6.126	<b>LETTERS NOTICES &amp; REMINDERS</b>							
LICENSING	6.127	<b>AGENCY-DEFINED PRINT FORMATS</b> - Allow Agency-defined print formats for licenses and renewal forms by type of license (without vendor customization).	x						
LICENSING	6.128	<b>AGENCY-DEFINED CORRESPONDENCE/NOTICE FORM LAYOUT</b> - Print licenses and renewal notices on forms created in Microsoft Word or other Agency-defined form layout.			x				
LICENSING	6.129	<b>SECOND NOTICE</b> - Ability to send second notices to all businesses.			x				
LICENSING	6.130	<b>E-MAIL CORRESPONDENCE FROM MASTER RECORD</b> - Ability to issue e-mail correspondence or notifications to businesses directly from the master record.	x						
LICENSING	6.131	<b>DELINQUENCY NOTICES</b> - Ability to setup multiple delinquency notices.			x				
LICENSING	6.132	<b>MAIL MERGE</b> - Ability to generate a variety of letters to businesses, entities or persons and merge the billing information into the letter.			x				

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
LICENSING	6.133	<b>MASS E-MAIL RENEWAL NOTIFICATIONS</b> - Ability to mass email annual license renewal notices.							x
LICENSING	6.134	<b>RENEWALS &amp; REMINDERS, EMAIL</b> - Ability to only email annual renewal and subsequent notifications.		x					
LICENSING	6.135	<b>RENEWALS &amp; REMINDERS, MAIL</b> - Ability to only mail renewal notifications to accounts without a functional or valid email address.		x					
LICENSING	6.136	<b>SUBSEQUENT RENEWALS &amp; REMINDERS, EMAIL</b> - Ability to only email annual renewal and subsequent notifications after agency-defined notice period (e.g., after 30 or 60 days).		x					
LICENSING	6.137	<b>SUBSEQUENT RENEWALS &amp; REMINDERS, MAIL</b> - Ability to only mail renewal notifications to accounts without a functional or valid email address after agency- defined notice period (e.g., after 30 or 60 days).		x					
LICENSING	6.138	<b>LICENSE RENEWALS</b>							
LICENSING	6.139	<b>LICENSE RENEWALS - ANNIVERSARY DATE</b> - Ability for license renewals to be based on their specific anniversary date.		x					
LICENSING	6.140	<b>RENEWAL FREQUENCY</b> - Ability to renew a license/registration by agency-defined periods:		x					
LICENSING	6.141	▪ One-time		x					
LICENSING	6.142	▪ Quarterly		x					
LICENSING	6.143	▪ Semi-Annual		x					
LICENSING	6.144	▪ Annual		x					
LICENSING	6.145	<b>BATCH ACTIONS</b> - Ability to perform the following actions in batch:		x					
LICENSING	6.146	▪ Insert Fees		x					
LICENSING	6.147	▪ Change Status		x					
LICENSING	6.148	▪ Insert Inspections		x					
LICENSING	6.149	▪ Insert notes (e.g., renewal letter sent)		x					
LICENSING	6.150	▪ Collect payment		x					
LICENSING	6.151	▪ Print licenses		x					
LICENSING	6.152	▪ Attach printed documents to individual licenses (e.g., renewal notice, license certificate, etc.)		x					
LICENSING	6.153	<b>BATCH PROCESSES</b> - Ability to define multiple batch processes each with different batch actions, such as:		x					
LICENSING	6.154	▪ Renewal Process (e.g., Insert fees, change status, print renewal notice, insert notes)		x					
LICENSING	6.155	▪ Licensed Process (e.g., Change status, print license certificate, insert notes)		x					
LICENSING	6.156	▪ Delinquent Process (e.g., Insert penalties, change status, print delinquent notice, insert notes)		x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
LICENSING	6.157	<b>PRE-DEFINED RENEWAL FEES BY LICENSE TYPE AND SUBTYPE</b> - Ability to predefine which license renewal fees should be automatically inserted by license type and subtype. <i>VENDOR NOTE - Users should not be required to manually apply fees to license types and subtypes as separate batch processes.</i>	x					
LICENSING	6.158	<b>REPORTS &amp; QUERIES</b>						
LICENSING	6.159	<b>PAST DUE REPORT</b> - Ability to produce a past-due or collections report.			x			
LICENSING	6.160	<b>COMMENTS HISTORY BY TYPE</b> - Provide ability to track comment history by type of comment, user, and date.			x			
LICENSING	6.161	<b>HISTORICAL REPORTING</b> - System must be able to generate reports by year and specified periods.			x			
LICENSING	6.162	<b>STATE BUSINESS FEE REPORT</b> - Ability to periodically report on \$XX.XX fees collected on behalf of the State.			x			
LICENSING	6.163	<b>RECEIPT AMOUNTS BY G/L ACCOUNT</b> - Ability to report on daily total license receipt amounts by General Ledger account number.			x			
LICENSING	6.164	<b>INVOICING/PAYMENT HISTORY</b> - Ability to track all invoicing and payment history (e.g., bills, payments, partial payments, overpayments, refund amounts, penalties, etc.).			x			
LICENSING	6.165	<b>DELINQUENT LISTING</b> - Provide on-demand listing of delinquent accounts and delinquency notices. Notice should be Agency-defined and editable.			x			
LICENSING	6.166	<b>SEARCH CRITERIA</b> - Provide online search/query by business name, license number, owner name, location, or business corporate officer's name, etc. Provide partial name capability on business name and owner name.	x					
LICENSING	6.167	<b>PUBLIC RECORDS REQUEST REPORT BY DATE</b> - Ability to provide a Public Records Request Report by selected dates.				x		
LICENSING	6.168	<b>SEARCHING AND QUERIES</b> - Ability to create unlimited ad hoc searches and queries of multiple data criteria, save searches, and share searches internally. (e.g. query all business data by license type within a specified date range)	x					
LICENSING	6.169	<b>INTEGRATION &amp; INTERFACES</b>						
LICENSING	6.170	<b>3rd PARTY MAILING SERVICE</b> - Integrate with third party printing and mailing services (e.g., <i>InfoSend</i> ).				x		
LICENSING	6.171	<b>BARCODE SCANNING CAPABILITY</b> - Provide functionality for interfacing scanners to read bar codes automatically to retrieve a license for payment.				x		
LICENSING	6.172	<b>INTEGRATION - STATE LICENSES BOARD</b> - Ability to Integrate the Business License application to the State License board in order to automatically check the contractors State license type, license number, and expiration date(s) for their license and insurance. <i>VENDOR NOTE - Integration should go beyond the State Licenses Board home page.</i>	x					



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
LICENSING	6.173	<b>INTEGRATION - STATE LICENSES BOARD - ONLINE BUSINESS LICENSES -</b> Ability to Integrate the Business License application to the State License board in order to automatically check and prevent the issuance of a business license to a contractor that is submitting or renewing an online business license application with an expired State license. <i>VENDOR NOTE - Integration should go beyond the State Licenses Board home page.</i>	x						
LICENSING	6.174	<b>ALERT- EXPIRED STATE LICENSE -</b> Ability for the system to automatically provide the user an alert when accessing a business license record for a contractor that has an expired State license.	x						
LICENSING	6.175	<b>GENERAL LEDGER -</b> Ability to interface to general ledger for posting of receivables and cash entries to proper accounts.				x			
LICENSING	6.176	<b>CASH RECEIPTS -</b> Ability to interface to cash receipts system to validate accounts and update license or tax receipts.				x			
LICENSING	6.177	<b>ACCOUNTS PAYABLE -</b> Provide ability to generate refund checks for overpayment of license or tax. Refunds to be processed through interface to accounts payable.				x			
LICENSING	6.178	<b>INTEGRATION - PARCEL/ADDRESS MANAGEMENT -</b> Integrate in real time to Parcel/Address Management to retrieve historical information on inspections performed on the parcel or address.	x						
LICENSING	6.179	<b>INTEGRATION - PARCEL/ADDRESS MANAGEMENT -</b> The parcel/address management application should provide address, parcel, owner, and zoning information to the Land Management System.	x						
LICENSING	6.180	<b>INTEGRATION - ESRI ARCGIS -</b> Ability to interface to GIS mapping products that support ESRI formats, including ArcGIS ( <i>Version 10.8</i> ).	x						
LICENSING	6.181	<b>INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM -</b> Ability to integrate with a third-party document management system ( <i>Laserfiche</i> ) to attach and store files or supporting documents to a record (e.g., plan blueprints, CAD images, logs, COA narratives, etc.).				x			

## City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

### Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
<b>Web Portal</b>									
<b>GENERAL FEATURES</b>									
Web Portal	7.000	<b>ACCOUNT LOGIN</b> - Ability to require a user to be logged in before any applications can be initiated.	x						
Web Portal	7.001	<b>ACCOUNT REGISTRATION</b> - Ability to register for an online account, which provides a user with a login ID and password.	x						
Web Portal	7.002	<b>REQUIRE PASSWORD CHANGE</b> - Ability to require a user to change their password after using a temporarily issued password to log in to their account (e.g., forgot password)	x						
Web Portal	7.003	<b>LOGIN ID &amp; PASSWORD RESET</b> - Ability for a user to receive an email ID or temporary password upon successfully answering security questions.	x						
Web Portal	7.004	<b>CONTRACTOR REGISTRATION</b> - Ability for contractors to register online (provide details if this is handled in contractors or in another module)	x						
Web Portal	7.005	<b>CONTRACTOR VALIDATION</b> - Ability to validate contractor expiration dates (e.g. during application and issuance) using the following criteria:	x						
Web Portal	7.006	▪ State License Expiration Date	x						
Web Portal	7.007	▪ Business License Expiration Date	x						
Web Portal	7.008	▪ Worker's Compensation Insurance Expiration Date	x						
Web Portal	7.009	▪ Bond Expiration Date	x						
Web Portal	7.010	▪ Certification Expiration Dates	x						
Web Portal	7.011	<b>VIEW HISTORY</b> - Ability to for users to view historical activities from the online portal (e.g., permits applied for, inspections completed, payments made, etc.)	x						
Web Portal	7.012	<b>RECAPTCHA</b> - Ability to use reCAPTCHA capabilities to prevent non-human activity in the online portal.	x						
Web Portal	7.013	<b>ADA COMPLIANCE</b> - Online public portal is compliant with Section 508 of the Rehabilitation Act and the Americans with Disabilities Act.	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
Web Portal	7.014	<b>SAVE APPLICATION PROGRESS</b> - Ability to apply online and save the application progress to complete by the applicant at a later time. NOTE: This should not submit the application.	x						
Web Portal	7.015	<b>SAVE APPLICATION TEMPLATE</b> - Ability to save an application template that can be used for repeated applications.	x						
Web Portal	7.016	<b>DATA SEARCHES</b>							
Web Portal	7.017	<b>PERMITTING SEARCHING</b> - Ability to allow or hide permit record searches.	x						
Web Portal	7.018	<b>PLANNING SEARCHING</b> - Ability to allow or hide planning record searches.	x						
Web Portal	7.019	<b>LICENSING SEARCHING</b> - Ability to allow or hide licensing record searches.	x						
Web Portal	7.020	<b>CONTRACTOR SEARCHING</b> - Ability to allow or hide contractor record searches.	x						
Web Portal	7.021	<b>CODE ENFORCEMENT SEARCHING</b> - Ability to allow or hide code enforcement record searches.	x						
Web Portal	7.022	<b>COMPLAINT SEARCHING</b> - Ability to allow or hide complaint searches.	x						
Web Portal	7.023	<b>PARCEL SEARCHING</b> - Ability to allow or hide parcel record searches.	x						
Web Portal	7.024	<b>SEARCH RESULTS</b> - Ability to hide specific record types by module in search results.	x						
Web Portal	7.025	<b>DATA DISPLAY</b> - Ability to select which sections of a record are displayed in searches by module. (e.g. Address, Record Number, Record Status, Date Submitted, Fee Balance Due, Department Contact Information, etc.)	x						
Web Portal	7.026	<b>APPLICATION DATA DISPLAY</b> - Ability to select which sections of an application are displayed to applicants. <i>Note: this functionality needs to allow to display more data than the data display via a search. Provide any restrictions in comments.</i>	x						
Web Portal	7.027	<b>GIS</b>							
Web Portal	7.028	<b>INTEGRATION</b> - Ability to integrate to Agency GIS map services.	x						
Web Portal	7.029	<b>DATA SEARCHES</b> - Ability to search for data in each module and display search results on the Agency GIS map.						x	
Web Portal	7.030	<b>GIS LAYERS</b> - Ability to turn on and off Agency map layers (e.g., Zoning, Historic District, School District, Water Lines, Sewer Laterals, etc.)	x						
Web Portal	7.031	<b>PERMITTING</b>							
Web Portal	7.032	<b>PERMIT APPLICATION ESTIMATE FEES</b> - Ability to provide customers a method of applying for a permit online to obtain estimated fees. NOTE: Permit should not have to be applied for.	x						
Web Portal	7.033	<b>ONLINE PERMIT APPLICATIONS ALLOWED</b> - Ability to specify which permits can be applied for online.	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
Web Portal	7.034	<b>CONDITIONAL LOGIC</b> - Ability to conditionally specify user prompted questions by Permit Type and based on prior input to a question.	x						
Web Portal	7.035	<b>SHOW/HIDE TYPES SUBTYPES</b> - Ability to show/hide types and subtypes.	x						
Web Portal	7.036	<b>CUSTOM FIELDS</b> - Ability to fill out custom fields.	x						
Web Portal	7.037	<b>HIDE CUSTOM SCREENS</b> - Ability to hide entire custom screens.	x						
Web Portal	7.038	<b>HIDE CUSTOM FIELDS</b> - Ability to hide specific custom fields within custom screens.	x						
Web Portal	7.039	<b>REQUIRED CUSTOM FIELDS</b> - Ability to specify which custom fields need to be populated.	x						
Web Portal	7.040	<b>REQUIRED CONTACT TYPES</b> - Ability to require contact types to be provided (e.g., Contractor, Owner, etc.)	x						
Web Portal	7.041	<b>REQUIRED CONTACT TYPES BY PERMIT TYPE</b> - Ability to indicate which contact types are required by permit type.	x						
Web Portal	7.042	<b>REQUIRE CONTACT FIELDS</b> - Ability to specify which contact fields need to be populated (e.g., name, email address, phone number, etc.).	x						
Web Portal	7.043	<b>APPLICATION INSTRUCTIONS</b> - Ability to provide instructions to applicants (e.g., short description of a field) by permit type.	x						
Web Portal	7.044	<b>APPLICATION - HYPERLINKS</b> - Ability to provide hyperlinks to other agency and non-agency websites during the application process.	x						
Web Portal	7.045	<b>ATTACHMENT INSTRUCTIONS</b> - Ability to provide attachments instructions (e.g., city naming conventions, which file types are not accepted, files exceeding certain MB are not accepted, etc.)	x						
Web Portal	7.046	<b>ATTACHMENT TYPES - FILE TYPES ALLOWED</b> - Ability to specify which file types can be uploaded (e.g., .pdf, .jpg, .csv, .txt, etc.)	x						
Web Portal	7.047	<b>REQUIRED ATTACHMENTS</b> - Ability to specify what type of attachments are required to be uploaded by type of application (e.g., plans, insurance documentation, etc.)	x						
Web Portal	7.048	<b>ELECTRONIC PLAN SUBMITTALS</b> - Ability for the public to submit electronic plans online. NOTE: Applies to simple and complex permits.	x						
Web Portal	7.049	<b>SHOW ATTACHMENTS</b> - Ability to show attachments online with agency configurable permissions on whom can view attachments online by permit type, by contact type, by file type. (e.g. the Applicant on the permit can view a set of plans on a re-roof permit, however only the Contractor may view the building plans on a new single family dwelling permit.)	x						
Web Portal	7.050	<b>UPLOAD ATTACHMENTS AFTER APPLICATION SUBMITTED</b> - Ability for applicants to upload attachments after an application has been submitted.	x						
Web Portal	7.051	<b>ATTACHMENTS - NOTIFICATIONS</b> - Ability to notify applicants/reviewers that new attachments have been uploaded.	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
Web Portal	7.052	<b>SIGNATURES</b> - Ability to capture an applicant's signature (vendors to explain in comments your methodologies for electronic signatures)						X	
Web Portal	7.053	<b>SIGNATURES ON FORMS</b> - Ability to request and place captured signatures on forms during the application process or after the application has been submitted prior to Approval or Issuance. (e.g., Declaration Form, Owner-Builders Disclosure Form, etc.)						X	
Web Portal	7.054	<b>PERMIT APPLICATIONS WITHOUT PAYMENT</b> - Ability to apply for a permit type online and not make a payment at the time of application.	X						
Web Portal	7.055	<b>PERMIT APPLICATIONS - PENDING APPROVAL/ISSUANCE</b> - Ability to apply for permits online in real time, but require Agency verification before actual permit approval and issuance.	X						
Web Portal	7.056	<b>PERMIT APPLICATIONS - ISSUE PERMIT W/O AGENCY REVIEW</b> - Ability for customers to apply for permits online in real-time and be issued a permit without requiring Agency verification/review (e.g., garage sale permit).	X						
Web Portal	7.057	<b>INSTANTLY ISSUED PERMITS</b> - Ability to configure and setup conditional logic to automate a plan review and permit approval to instantly issue a permit. (e.g., to instantly Issue Residential Solar Permits per SB-379)	X						
Web Portal	7.058	<b>PAY SPECIFIC FEES ONLINE</b> - Ability to allow the public to pay for specific fees online (e.g., collect only plan check fees).	X						
Web Portal	7.059	<b>PREVENT FEE PAYMENT ONLINE</b> - Ability to allow the public to pay for specific fees online during the Application process, and prevent the payment of other Auto-Inserted Fees till the Permit is set to a specified Status (e.g., collect only plan check fees at Application, and then collect additional fees after status APPROVED).	X						
Web Portal	7.060	<b>AUTO ROUTE SUBMITTED APPLICATION</b> - Ability to automatically route the submitted application to a predefined staff to perform an intake review or completeness check.	X						
Web Portal	7.061	<b>PERMIT STATUS</b> - Ability for the public to view the status of a permit.	X						
Web Portal	7.062	<b>REVIEW COMMENT RESPONSES</b> - Ability for the Applicant to respond to permit review comments inside the public portal with notification to applicable staff.	X						
Web Portal	7.063	<b>ONLINE PERMIT PRINTING</b> - Ability for customers to print permits from the public portal.	X						
Web Portal	7.064	<b>PREVENT PERMIT PRINTING UNLESS PERMIT ISSUED</b> - Ability to prevent online permit printing unless the permit status is "Issued".	X						
Web Portal	7.065	<b>PREVENT PERMIT PRINTING BY PERMIT TYPE</b> - Ability to prevent online permit printing by Permit Type.	X						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
Web Portal	7.066	<b>ONLINE PERMIT PRINTING - LAYOUTS</b> - Ability to specify which permit layout to print by permit type (e.g., Reroof Permit, garage sale permit layout, building permit layout, etc.)	x						
Web Portal	7.067	<b>DOWNLOAD APPROVED PLANS</b> - Ability to allow approved electronic plans to be available for download by specific contacts associated with that specific permit once a permit is issued, on a permit by permit basis.		x					
Web Portal	7.068	<b>PLANNING AND LAND DEVELOPMENT PROJECTS</b>							
Web Portal	7.069	<b>PROJECT APPLICATION ESTIMATE FEES</b> - Ability to provide customers a method of applying for a project online to obtain estimated fees. NOTE: Project should not have to be applied for.	x						
Web Portal	7.070	<b>ONLINE PROJECT APPLICATIONS ALLOWED</b> - Ability to specify which projects can be applied for online.		x					
Web Portal	7.071	<b>SHOW/HIDE TYPES SUBTYPES</b> - Ability to show/hide types and subtypes.		x					
Web Portal	7.072	<b>CUSTOM FIELDS</b> - Ability to fill out custom fields.		x					
Web Portal	7.073	<b>HIDE CUSTOM SCREENS</b> - Ability to hide entire custom screens.		x					
Web Portal	7.074	<b>HIDE CUSTOM FIELDS</b> - Ability to hide specific custom fields within custom screens.		x					
Web Portal	7.075	<b>REQUIRED CUSTOM FIELDS</b> - Ability to specify which custom fields need to be populated.		x					
Web Portal	7.076	<b>REQUIRED CONTACT TYPES</b> - Ability to require contact types to be provided (e.g., Contractor, Owner, etc.)		x					
Web Portal	7.077	<b>REQUIRED CONTACT TYPES BY PROJECT TYPE</b> - Ability to indicate which contact types are required by project type.		x					
Web Portal	7.078	<b>REQUIRE CONTACT FIELDS</b> - Ability to specify which contact fields need to be populated (e.g., name, email address, phone number, etc.).		x					
Web Portal	7.079	<b>APPLICATION INSTRUCTIONS</b> - Ability to provide instructions to applicants (e.g., short description of a field) by project type.		x					
Web Portal	7.080	<b>APPLICATION - HYPERLINKS</b> - Ability to provide hyperlinks to other agency and non-agency websites during the application process.		x					
Web Portal	7.081	<b>ATTACHMENT INSTRUCTIONS</b> - Ability to provide attachments instructions (e.g., which file types are not accepted, files exceeding certain MB are not accepted, etc.).		x					
Web Portal	7.082	<b>ATTACHMENTS - FILE TYPES ALLOWED</b> - Ability to specify which file types can be uploaded (e.g., .pdf, .jpg, .csv, .txt, etc.).		x					
Web Portal	7.083	<b>REQUIRED ATTACHMENTS</b> - Ability to specify what type of attachments are required to be uploaded by type of application (e.g., plans, insurance documentation, etc.).		x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
Web Portal	7.084	<b>ELECTRONIC PLAN SUBMITTALS</b> - Ability for the public to submit electronic plans online. NOTE: Applies to simple and complex projects.	x						
Web Portal	7.085	<b>SHOW ATTACHMENTS</b> - Ability to show attachments online with agency configurable permissions on whom can view attachments online by project type, by contact type, by file type. (e.g. the Applicant on the project can view a set of plans on a pre-application project, however only the Developer may view the plans on a subdivision project.)	x						
Web Portal	7.086	<b>UPLOAD ATTACHMENTS AFTER APPLICATION SUBMITTED</b> - Ability for applicants to upload attachments after an application has been submitted.	x						
Web Portal	7.087	<b>ATTACHMENTS - NOTIFICATIONS</b> - Ability to notify applicants/reviewers that new attachments have been uploaded.	x						
Web Portal	7.088	<b>ATTACHMENTS FOR SIGNATURE BY APPLICANT</b> - Ability for the agency to upload an attachment to a record and request the Applicant print, sign, and re-upload the document.	x						
Web Portal	7.089	<b>SIGNATURES</b> - Ability to capture an applicant's signature (vendors to explain in comments your methodologies for electronic signatures)				x			
Web Portal	7.090	<b>SIGNATURES ON FORMS</b> - Ability to request and place captured signatures on forms during the application process or after the application has been submitted prior to Approval.				x			
Web Portal	7.091	<b>PROJECT APPLICATIONS - PENDING APPROVAL/ISSUANCE</b> - Ability to apply for projects online in real time, but require Agency verification before approval.	x						
Web Portal	7.092	<b>PAY SPECIFIC FEES ONLINE</b> - Ability to allow the public to pay for specific fees online.	x						
Web Portal	7.093	<b>AUTO ROUTE SUBMITTED APPLICATION</b> - Ability to automatically route the submitted application to a predefined staff to perform an intake review or completeness check.	x						
Web Portal	7.094	<b>PROJECT STATUS</b> - Ability for the public to view the status of a project.	x						
Web Portal	7.095	<b>REVIEW COMMENT RESPONSES</b> - Ability for the Applicant to respond to project review comments inside the public portal with notification to applicable staff.	x						
Web Portal	7.096	<b>ONLINE LICENSES, REGISTRATIONS, AND RENEWALS</b>							
Web Portal	7.097	<b>WEB ACCESS</b> - Complete routine tasks online associated with licenses or taxes, such as complete new applications or register online, search for license or tax, renew, and submit payments online.	x						
Web Portal	7.098	<b>NEW ONLINE BUSINESS LICENSE</b> - Ability to receive a new license application on-line via a public portal.	x						



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
Web Portal	7.099	<b>NEW ONLINE BUSINESS LICENSE - ATTACHMENTS</b> - Ability for an applicant to attach documents to a new online license application.	x						
Web Portal	7.100	<b>SIGNATURES</b> - Ability to capture an applicant's signature (vendors to explain in comments your methodologies for electronic signatures)	x						
Web Portal	7.101	<b>ONLINE BUSINESS LICENSE RENEWALS</b> - Ability to renew business license applications on-line via the public portal and allow for standard and <b>Agency-defined</b> fields to be updated during online renewal by License Type. Examples listed below.	x						
Web Portal	7.102	▪ Business Name or DBA	x						
Web Portal	7.103	▪ Legal Business Name	x						
Web Portal	7.104	▪ License Holder Name	x						
Web Portal	7.105	▪ Business Mailing Address	x						
Web Portal	7.106	▪ Business Email Address	x						
Web Portal	7.107	▪ Business Phone	x						
Web Portal	7.108	▪ Other <b>Agency-defined</b> fields	x						
Web Portal	7.109	<b>BUSINESS LICENSE RENEWAL WORKFLOW</b> - Ability to setup License Renewal workflow that can trigger an automatic Review and set the license status to Pending during a license renewal process based on specific criteria, such as a change in any field during the renewal process. (e.g., Owner name is changed, or any specified field is updated online during the renewal process)	x						
Web Portal	7.110	<b>PREVENT RENEWAL BASED ON STATUS</b> - Prevent the public from processing a license renewal based on license status (e.g., pending, withdrawn, expired, revoked, etc.)	x						
Web Portal	7.111	<b>PREVENT PAYMENT BASED ON STATUS</b> - Prevent online payments for licenses based on license status.	x						
Web Portal	7.112	<b>WORKFLOW PROCESS</b> - Ability to define the workflow process for an online application by type of application as follows:	x						
Web Portal	7.113	▪ Apply and submit application but do not require payment of fees	x						
Web Portal	7.114	<b>ONLINE PAYMENT NOTIFICATION</b> - Ability to generate a notification to staff when the public makes an online payment. Please specify how notifications are received (e.g., email, system task, etc.)	x						
Web Portal	7.115	<b>ONLINE LICENSE PRINTING</b> - Ability to allow printing of the license certificate from the public portal based on license status or other criteria.	x						
Web Portal	7.116	<b>REVIEWS</b>							
Web Portal	7.117	<b>REVIEW COMMENTS</b> - Ability to see comments online.	x						
Web Portal	7.118	<b>REDLINES</b> - Ability to see page by page the redlines.	x						
Web Portal	7.119	<b>PRINT COMMENTS</b> - Ability to print a list of Review Comments online.	x						



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
Web Portal	7.120	<b>INSPECTIONS</b>							
Web Portal	7.121	<b>ONLINE INSPECTION REQUESTS</b> - Ability for customers to submit inspection requests.	x						
Web Portal	7.122	<b>PROFILE TO SCHEDULE</b> - Require a customer to create an online profile to schedule inspections limited to records they are associated with.	x						
Web Portal	7.123	<b>INSPECTION REQUEST LEAD TIME</b> - Ability for inspection requests to be submitted 24 hours in advance.	x						
Web Portal	7.124	<b>RESTRICT INSPECTION SCHEDULING BY INSPECTION TYPE</b> - Ability to restrict specific inspections from being scheduled online (e.g., Fire Inspection)	x						
Web Portal	7.125	<b>INSPECTION CONFIRMATION NUMBER</b> - Generate an inspection confirmation number.	x						
Web Portal	7.126	<b>INSPECTION CONFIRMATION E-MAIL</b> - Generate a confirmation e-mail to inspection requestor.	x						
Web Portal	7.127	<b>INSPECTION TIME</b> - Allow the public to view/check their scheduled inspection time window online, including real-time status updates.	x						
Web Portal	7.128	<b>INSPECTION RESULTS</b> - Allow the public to check the status (pass/fail) of an inspection.	x						
Web Portal	7.129	<b>RESTRICT INSPECTION REQUESTS OUTSIDE OF BUSINESS HOURS</b> - Restrict the ability for customers to request an inspection that is outside of normal business hours (e.g., after 6pm).	x						
Web Portal	7.130	<b>RECORD STATUS</b> - Ability for agency to determine which record statuses will allow inspection scheduling (e.g., permit has to have ISSUED status, etc.)	x						
Web Portal	7.131	<b>ONLINE INSPECTION SCHEDULE CHECK</b> - Allow citizens to view/check their scheduled inspection time window online.	x						
Web Portal	7.132	<b>ONLINE INSPECTION STATUS CHECK</b> - Allow citizens to check the status (pass/fail) of an inspection from the Internet in real-time.	x						
Web Portal	7.133	<b>CODE ENFORCEMENT</b>							
Web Portal	7.134	<b>CODE COMPLAINTS</b> - Allow for the public to submit violation complaints.	x						
Web Portal	7.135	<b>ANONYMOUS VIOLATION COMPLAINTS</b> - Allow for the public to submit anonymous violation complaints.	x						
Web Portal	7.136	<b>RESTRICT VIEW ACCESS</b> - Ability to determine which fields the public can view.	x						
Web Portal	7.137	<b>COMPLAINT STATUS</b> - Ability to allow the public to check the status of a logged complaint.	x						
Web Portal	7.138	<b>HIDE CODE CASES</b> - Ability to block specific code cases from being searched in the public portal.	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
Web Portal	7.139	<b>GIS/PARCEL/ADDRESS MANAGEMENT</b>							
Web Portal	7.140	<b>VALID ADDRESSES</b> - Ability to require a user to select a valid site location selection for applications (e.g., no free form address entry).	x						
Web Portal	7.141	<b>ONLINE PROPERTY INFO SEARCH</b> - Ability for the public to search property information online (e.g., zoning, square footage, etc.).	x						
Web Portal	7.142	<b>GIS MAPPING</b> - Ability to search application data on GIS map (e.g., display all issued permits on a map, display active planning projects, display open code cases, etc.)						x	
Web Portal	7.143	<b>ONLINE PAYMENTS</b>							
Web Portal	7.144	<b>ONLINE CREDIT CARD MERCHANT</b> - Ability to integrate to an online credit card merchant (vendors to list in the comments section merchants the product supports)	x						
Web Portal	7.145	<b>CREDIT CARD PAYMENTS</b> - Ability to accept customer credit card payments online.	x						
Web Portal	7.146	<b>CREDIT CARD PAYMENT CHARGE</b> - Ability to charge a percentage or amount for credit card charges to users utilizing online credit card payments.	x						
Web Portal	7.147	<b>ACH/EFT PAYMENTS</b> - Ability to accept payments through ACH/EFT (eChecks).	x						
Web Portal	7.148	<b>ACH/EFT PAYMENT CHARGE</b> -Ability to charge a percentage or dollar amount to a customer paying with an electronic check.	x						
Web Portal	7.149	<b>ONLINE PAYMENT NOTIFICATION</b> - Ability to generate a notification to staff when the public makes an online payment. Please specify how notifications are received (e.g., email, system activity/task, etc.)	x						
Web Portal	7.150	<b>CASH BONDS</b> - Ability to pay for cash bonds online (e.g. money held by the Agency as a surety to be refunded if work is completed satisfactory to the Agency standards)	x						
Web Portal	7.151	<b>TRANSACTION RECEIPTS</b> - Ability to generate a receipt for online payments.	x						

## City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

### Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
<b>Cashiering</b>									
<b>GENERAL FEATURES</b>									
CASHIERING		<b>FULLY FUNCTIONAL CASHIERING WORKSTATION</b> - Ability for all cashiering workstations to support other software applications (e.g., Microsoft Office suite).	x						
CASHIERING		<b>DATETIME TRANSACTION STAMP</b> - Ability to capture the transaction date and time on each transaction.	x						
CASHIERING		<b>OFFLINE CASHIERING FUNCTIONALITY</b> - Ability to support an offline cashiering function in case the network becomes disabled. This includes saving transaction data locally and synchronizing the data once connectivity is restored.						x	
CASHIERING		<b>EMAIL NOTIFICATION</b> - Ability to email customer/payer a message.	x						
CASHIERING		<b>EMAIL NOTIFICATION</b> - Ability to allow customers to opt in/out of email message notification.	x						
CASHIERING		<b>AGENCY-DEFINED CASH RECEIPT FIELDS</b> - Ability to create unlimited agency-defined fields by cash receipt type.	x						
CASHIERING		<b>AGENCY-DEFINED PAYMENT CODES</b> - Ability to create unlimited agency-defined payment types.	x						
CASHIERING		<b>CUSTOMER ALERTS</b>							
CASHIERING		<b>TENDER TYPE ALERT</b> - Ability to flag person/entities and addresses as cash or credit card only (no checks), including the ability to add a NOTE on the entity regarding previous NSF incidents.	x						
CASHIERING		<b>PAYMENTS</b>							
CASHIERING		<b>OVERPAYMENT ALERT</b> - Ability to automatically alert users of an overpayment prior to payment.	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
CASHIERING		<b>MIX RECEIPT OF TENDERS</b> - Ability to simultaneously process the following: cash, check, credit/debit card, money orders, cashier's checks, ACH, wire transfer, etc.	x					
CASHIERING		<b>CHECK PAYMENT ENDORSEMENT</b> - Ability to endorse checks. Endorsement to include entity name, bank name, bank account number, receipt number, customer account number, date, and time.						x
CASHIERING		<b>ADVANCE PAYMENTS</b> - Ability to accept advance payments that do not have an outstanding receivable (e.g., deposits or cash bonds).	x					
CASHIERING		<b>PAYMENT - MULTIPLE INVOICES</b> - Ability for a payment to be applied to multiple invoices.						x
CASHIERING		<b>PARTIAL PAYMENT</b> - Ability for a payment to be applied to a portion of the fees due.	x					
CASHIERING		<b>ONLINE PAYMENTS</b>						
CASHIERING		<b>ONLINE PAYMENTS</b> - Ability to accept customer credit card payments online.	x					
CASHIERING		<b>CREDIT CARD PAYMENT CHARGE</b> - Ability to charge a percentage or amount for credit card charges to users utilizing online credit card payments.	x					
CASHIERING		<b>PENDING AND END OF THE DAY POST</b> - Ability to apply a "pending post" status to all modules' customer accounts during the day, so that sub-modules immediately reflect correct account/invoice balances (e.g., accounts receivable, permits, etc.).	x					
CASHIERING		<b>ONLINE PAYMENTS - NSF ALERT FOR ELECTRONIC CHECKS</b> -Ability to alert and prevent a customer with a prior NSF check from paying with an electronic check.				x		
CASHIERING		<b>ONLINE PAYMENTS - ELECTRONIC CHECKS</b> - Ability to charge a percentage or dollar amount to a customer paying with an electronic check.	x					
CASHIERING		<b>RECEIPT GENERATION</b>						
CASHIERING		<b>RECEIPT PRINTING</b> - Ability to print receipt from a PC that is not a cash register.	x					
CASHIERING		<b>EMAIL RECEIPTS</b> - Ability to email receipts to the email address associated with the customer account, with the ability to change the email.	x					
CASHIERING		<b>PARTIAL CREDIT CARD # ON RECEIPT</b> - Ability to only print a partial credit card number on a receipt.	x					
CASHIERING		<b>RECEIPT LAYOUTS BY TRANSACTION TYPE</b> - Ability to define receipt layouts by transaction type.	x					
CASHIERING		<b>INVOICE</b> - Ability to generate an invoice with an automatically generated invoice number to a specific contact for fees due on a single or across multiple records and modules. (e.g., a contractor owes fees on a project, permit and license, a single Invoice can be created for all of the fees due)	x					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
CASHIERING	8.029	<b>END OF DAY PROCESSING</b>						
CASHIERING	8.030	<b>CASH RECEIPTS JOURNAL</b> - Ability to print a cash receipts journal by cashier and by totals:	X					
CASHIERING	8.031	▪ Bank account	X					
CASHIERING	8.032	▪ General ledger account number	X					
CASHIERING	8.033	▪ Receivable type	X					
CASHIERING	8.034	▪ Payment type	X					
CASHIERING	8.035	▪ Customer account	X					
CASHIERING	8.036	▪ Date	X					
CASHIERING	8.037	▪ Time	X					
CASHIERING	8.038	▪ Cashier	X					
CASHIERING	8.039	▪ Dollar amount	X					
CASHIERING	8.040	▪ Description	X					
CASHIERING	8.041	▪ Record Number (e.g., permit number, project number, etc.)	X					
CASHIERING	8.042	<b>BANK DEPOSIT SLIP</b> - Ability to print a bank deposit slip. <i>Vendor Note - should print multiple deposit slips if using multiple bank accounts.</i>						
CASHIERING	8.043	<b>TENDER PROCESSING</b> - Ability for receipts to be processed while the prior day's receipts have not yet been closed.						
CASHIERING	8.044	<b>REJECT BATCH NOT IN BALANCE</b> - Ability for the system to reject or suspend batches that do not balance by either item or dollar totals.						
CASHIERING	8.045	<b>RECEIPT CORRECTIONS</b> - Ability to correct receipts made in error before posting the batch to the General Ledger module.						
CASHIERING	8.046	<b>CORRECTING OF RECEIPT SECURITY</b> - Ability to require an approval for adjustments or correcting receipts by specific users by permissions.	X					
CASHIERING	8.047	<b>INQUIRY AND REPORTS</b>						
CASHIERING	8.048	<b>TRACKING OF TENDER TYPES</b> - Ability to maintain the transaction and the dollar totals by the tender type.			X			
CASHIERING	8.049	<b>TRACKING OF COIN DENOMINATIONS</b> - Ability to track cash and coin denominations by bundles, rolls, and loose currency.						
CASHIERING	8.050	<b>RECEIPT AMOUNTS BY GENERAL LEDGER ACCOUNT</b> -Ability to report on daily total receipt amounts by general ledger account number.			X			
CASHIERING	8.051	<b>CASH RECEIPTS INQUIRY</b> - Ability to query Cash Receipts by each of the following:	X					
CASHIERING	8.052	▪ Customer account number	X					
CASHIERING	8.053	▪ Name	X					
CASHIERING	8.054	▪ Address	X					
CASHIERING	8.055	▪ Operator ID	X					
CASHIERING	8.056	▪ General ledger account number	X					
CASHIERING	8.057	▪ Payment date	X					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	CRM	Comments
CASHIERING		▪ Payment amount	X					
CASHIERING		▪ Payment type	X					
CASHIERING		▪ Invoice number	X					
CASHIERING		<b>DAILY DECLINED TRANSACTIONS</b> - Ability to generate daily reports for rejected bank and credit card transactions.			X			
CASHIERING		<b>RECONCILIATION - CASH RECEIVED FROM CASHIERS</b> - Ability to generate reports for reconciliation of monies collected by cashiers.			X			
CASHIERING		<b>BALANCING REPORT</b> - Ability to generate a report at end of day to assist with bank reconciliation and generation of a bank deposit.			X			
CASHIERING		<b>AUDIT TRAIL OF CORRECTED CASH RECEIPTS</b> - Ability to produce a full audit trail of cash-entry error corrections and/or adjustments.	X					
CASHIERING		<b>SECURITY</b>						
CASHIERING		<b>CASH DRAWER ACCESS</b> - Ability to restrict user access to specific cash drawers.	X					
CASHIERING		<b>CASH DATA ENTRY DEFAULT OVERRIDES</b> - Ability to override the system-displayed default amount during cash-receipts entry.	X					
CASHIERING		<b>AUTO OPEN DRAWER BY TENDER TYPE</b> - Ability to allow the cash drawer to open automatically based on tender type (e.g., open for cash transactions, do not open for credit card transactions or checks, etc.).	X					
CASHIERING		<b>NON-TRANSACTIONAL OPENING &amp; CLOSING OF DRAWER</b> -Ability to maintain an audit trail of instances when a cash drawer was opened and closed without completing a transaction (e.g., drawer opened to make change for a customer).	X					
CASHIERING		<b>PAYMENT BATCH APPROVALS</b> -Ability for only authorized users to approve of payment batches.	X					
CASHIERING		<b>PCI COMPLIANCE</b> - Ability to ensure application is subject to the payment card information data security standard (PCI-DSS). If not, please describe how payment card transactions are handled and what information is stored to allow reconciliation of payment card transactions.	X					
CASHIERING		<b>PCI CERTIFICATION</b> - Ability to ensure application has been certified as meeting the Payment Application Data Security Standard (PA-DSS) by a Payment Application Qualified Security Assessor (PA-QSA). If not, please state when the vendor expects certification to be completed.	X					
CASHIERING		<b>INTEGRATIONS AND INTERFACES</b>						
CASHIERING		<b>ACCESS TO ACCOUNT INFORMATION</b> - Ability to provide online inquiry access to, and validation of, customer account information from all integrated modules (e.g., Accounts Receivable).	X					
CASHIERING		<b>ONLINE PAYMENTS</b> - Ability to accept customer payments via the web portal:	X					

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
CASHIERING		▪ Accounts Receivable invoice	X							
CASHIERING		▪ Permit and Project Payments	X							
CASHIERING		▪ Business Licenses	X							
CASHIERING		<b>CHECK SCANNING CAPABILITY</b> - Ability to interface with check scanning hardware for customers that mail in remittance stubs or do not in the case of customers paying via a bank file. Remittance should tie to a customer account.							X	
CASHIERING		<b>INTEGRATION - ACCOUNTS RECEIVABLE</b> - Ability for cash receipt transactions to immediately update (in a temporary or pending mode) accounts receivable accounts.							X	
CASHIERING		<b>INTEGRATION - BUSINESS LICENSE</b> - Ability to receive and post cash-receipt transactions from Business Licensing.	X							
CASHIERING		<b>INTEGRATION - GENERAL LEDGER</b> - Ability to automatically generate journal entries to the General Ledger module, insuring balancing and non-duplicate transaction posting for all cash receipts.							X	
CASHIERING		<b>INTEGRATION - ACCOUNTS PAYABLE</b> - Ability to automatically generate accounts payable entries to the AP module							X	
CASHIERING		<b>INTEGRATION - PERMITTING</b> - Ability to integrate in real time to Permitting for payment processing.	X							
CASHIERING		<b>INTEGRATION - PLANNING</b> - Ability to integrate in real time to Planning for payment processing.	X							
CASHIERING		<b>INTEGRATION CREDIT CARD PROCESSOR</b> - Ability to integrate with ( <i>AllPaid</i> ) for credit card acceptance.							X	
CASHIERING		<b>INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM</b> -Ability to integrate with a third-party document management system ( <i>Laserfiche</i> ) to attach and store files or supporting documents to a record (e.g., plan blueprints, CAD images, logs, COA narratives, etc.).							X	

## City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

### Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Cost	Comments
<b>Parcel/Address/Location Management</b>								
<b>GENERAL FEATURES</b>								
	9.001	<b>GEOGRAPHIC DATABASE</b> - Provide a geographic database of parcel, occupancy, and land use with "unlimited" Agency-defined fields and attributes.	x					
	9.002	<b>ADDITIONAL PROPERTY ADDRESS INFORMATION</b> -Ability to track additional property address information (e.g., apartment number, suite number, lot number, tract number, etc.).	x					
	9.003	<b>NON-ADDRESS LOCATIONS</b> - Ability to setup location identifications for parcels without addresses (vacant lots, intersections, road sections, easements without addresses, HOA lots without addresses, etc.).	x					
	9.004	<b>COMMON PARCEL/ADDRESS INFORMATION TO ALL APPLICATIONS</b> - Provide for one table structure to provide parcel/address information across all modules.	x					
	9.005	<b>LEGAL PARCEL INFORMATION</b> - Provide for the inclusion of legal description for each parcel.	x					
	9.006	<b>MULTIPLE ADDRESSES PER PARCEL</b> - Provide for multiple addresses per parcel.	x					
	9.007	<b>ATTACHED PHOTOS, IMAGES, DRAWINGS, DOCUMENTS TO PARCEL</b> - Provide capability to attach photos, images of final plan drawings, documents, etc., to a parcel database record.	x					
	9.008	<b>MULTIPLE PARCELS WITH BOUNDARIES</b> - Provide for the definition of parcels within multiple specific boundaries (i.e., Council Districts, Fire Districts, School District, Flood Plain, Tract, CUP, PD, Spec. Plan, etc.).	x					
	9.009	<b>ZONING INFORMATION</b> - Provide for the inclusion of zoning information by parcel.	x					
	9.010	<b>GENERAL PLAN INFORMATION</b> - Ability to include multiple land use designations per parcel.	x					



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
	9.011	<b>PROPERTY SEARCH REQUIREMENTS</b> - Ability to search properties by parcel ID number, previous parcel number, current owner name, or property address.	x							
	9.012	<b>ADDRESS/PARCEL HISTORY</b>								
	9.013	<b>TRACK ADDRESS/PARCEL HISTORY</b> - Provide for tracking address/parcel history, including effective dates.	x							
	9.014	<b>TRACKING OF PARCEL SPLIT OR CONSOLIDATIONS</b> - Facilitate the tracking of split or consolidated parcels with effective dates.	x							
	9.015	<b>TRACKING OF PARCEL SPLIT OR CONSOLIDATIONS</b> - Ability to track genealogy of parcels and history of parcel splits or parcel consolidations.	x							
	9.016	<b>PARCEL OWNERSHIP HISTORY</b> - Ability to maintain property ownership history when a parcel is retired.	x							
	9.017	<b>ADDRESS GENEALOGY</b> - Ability to maintain genealogy of an address and its history.	x							
	9.018	<b>OWNER INFORMATION</b>								
	9.019	<b>MULTIPLE CONTACTS PER ADDRESS</b> - Provide for multiple related party contact information per address (e.g., tenant, owner, etc.).	x							
	9.020	<b>HISTORICAL OWNER INFORMATION</b> - Ability to maintain historical ownership information with effective dates.	x							
	9.021	<b>LOCK-HOLDS</b>								
	9.022	<b>LOCK PROPERTY</b> - Ability to automatically lock all records associated with a locked property (e.g., address, parcel, permits, projects, etc.).	x							
	9.023	<b>UNLOCKING PROPERTY AUTO UNLOCKS RELATED RECORDS</b> - Lifting a property lock should automatically lift locks from related records (e.g., permits, projects, licenses, etc.).	x							
	9.024	<b>ALERTS</b>								
	9.025	<b>PROPERTY TYPE ALERTS</b> - Ability for system to alert users that a property is in special zones when viewing property information (e.g., flood plain, liquefaction, high-fire zones, earthquake faults, redevelopment areas, special housing, special plan areas, etc.).	x							
	9.026	<b>NOTE ALERTS</b> - Ability to setup alerts for an address (e.g., confrontational owner, gang related activity, open code case, etc.) that are generated throughout system modules (e.g., code enforcement, permitting, etc.).	x							
	9.027	<b>SECURITY</b>								
	9.028	<b>ADDRESS SELECTION</b> - Provide capability to force the selection of a valid address and street name from a database to insure consistent data entry.	x							
	9.029	<b>CHANGE ADDRESS ACCESS</b> - Ability to restrict address and parcel number field changes to specific users.	x							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
<b>9.030 INTEGRATION - INTERFACE</b>									
	9.031	<b>IMPORT OF COUNTY OR OTHER PARCEL INFORMATION</b> - Provide for the establishment and periodic update of County Assessor's database.	X						
	9.032	<b>CHANGE CONTROL OF IMPORTED PARCEL INFORMATION</b> - Provide a change control process for updates from the County Assessor and maintain this as an audit trail.	X						
	9.033	<b>INTERFACE - PLANNING</b> - Parcel Management should provide address, parcel, owner, zoning information, and other location data to Planning application.	X						
	9.034	<b>INTERFACE - CODE ENFORCEMENT</b> - Parcel Management should provide address, parcel, owner, zoning information, and other location data to Code Enforcement application.	X						
	9.035	<b>INTERFACE - PERMITS</b> - Parcel Management should provide address, parcel, owner, zoning information, and other location data to the Permits application.	X						
	9.036	<b>INTERFACE - BUSINESS LICENSING</b> - Parcel Management should provide address, parcel, owner, zoning information, and other location data to Business Licensing.	X						
	9.037	<b>INTERFACE - INSPECTIONS</b> - Parcel Management should provide address, parcel, owner, zoning information, and other location data to the inspection application.	X						
	9.038	<b>PARCEL ALERTS TO OTHER MODULES</b> - Ability for customer defined parcel alerts to popup or display in other land management modules (e.g., open code enforcement case, flood zone, environmental sensitive property, deed restrictions, etc.).	X						
	9.039	<b>AUTOMATION TO OTHER MODULES</b> - Ability to automatically initiate an action on linked permits/projects/code cases/business licenses based on GIS attributes (e.g., automatically add a fee if property is in historical district, automatically add a review if property is in a fire district, etc.)	X						
<b>9.040 GIS INTEGRATION</b>									
	9.041	<b>PARCEL/OTHER MODULE INFORMATION FROM MAP</b> - Provides ability to select parcel or group of parcels from GIS map and drill-down to parcel or activity information (e.g., any parcel data elements and other module information such as permits, projects, code cases, etc.).	X						
	9.042	<b>VIEW MASTER RECORD LOCATION INFORMATION ON MAP</b> - Ability to pull up map view of location from application/module master record (e.g., planning project, permit, inspection, code enforcement case, etc.).	X						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer					Comments
	9.043	<b>VIEWING ACTIVITY ON MAP</b> - Provide the ability to display locations on the GIS viewer by activity type/status (e.g., permits by status [open/closed, type], planning project, code cases [open/closed, type], work orders [open/closed, type], etc.).	x							
	9.044	<b>RADIUS SEARCHES</b> - Ability to perform searches within a radius (e.g., parcels/addresses, permits or projects within a given area, etc.).	x							
	9.045	<b>LOCATION SEARCHES</b> - Provides ability to search for locations by anything on the map: an address, a location, a name, an intersection, a customer account number, etc.	x							
	9.046	<b>DISPLAY MAP</b> - Ability to color code activity on map by type of activity (e.g., work order type, permit types, code case types, etc.).	x							
	9.047	<b>DISPLAY MAP - ASSET TYPES</b> - Ability to color code asset types on map.	x							
	9.048	<b>HEAT MAPS</b> - The system has the ability to generate "heat-maps" on GIS mapping in order to identify areas of large activity volume.	x							
	9.049	<b>ROUTES</b> - The system should be able to use GIS to compute inspection routes based on specific information including, but not limited to, using layers in GIS for territories.	x							
	9.050	<b>BI-DIRECTIONAL INTERFACING</b> - The interface between the GIS and other vendor modules should be bi-directional. The ability to query, view, and interact with location data with a spatial location and display them in a GIS viewer.	x							
	9.051	<b>GIS DATA SYNCHRONIZATION</b> - Provides ability to synchronize any changes from GIS to update related location data from vendor modules.	x							
	9.052	<b>MOBILE APPLICATION</b> - Ability for the mobile application to retrieve GIS information.	x							
	9.053	<b>WEB SERVICES</b> - Ability to consume a web service.	x							
	9.054	<b>SECURE SERVICE SUPPORT</b> - Ability to consume data through secured services.	x							
	9.055	<b>GIS DATA PORTAL</b> - The system should be able to perform data exchange with Federated and UnFederated GIS data portals.	x							
	9.056	<b>INTERFACE - GIS</b> - Ability to find any parcel on a map by address or parcel number and drill down to all related information, flags, permits, documents, photos, conditions, GIS layers, etc., interfacing to ESRI ArcGIS ( <b>Version 10.8</b> ).	x							
	9.057	<b>INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM</b> -Ability to integrate with a third-party document management system ( <b>Laserfiche</b> ) to attach and store files or supporting documents to a record (e.g., plan blueprints, CAD images, logs, COA narratives, etc.).				x				

# City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

## Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Cost	Comments
<b>Ad Hoc Reporting</b>								
<b>GENERAL FEATURES</b>								
	10.001	<b>AGENCY-DEFINED FIELD REPORTING</b> - Ability to inquiry and report on agency-defined fields.			x			<b>ad-hoc report writer is a standard out of the box tool in the current software</b>
	10.002	<b>USER DASHBOARD</b> - Ability to create user-configurable dashboards that accesses components of all system modules.			x			
	10.003	<b>REPORT WRITER PERFORMANCE</b> - Ability to process report writer requests at any time throughout the processing day, without impacting system performance.			x			
	10.004	<b>REPORT WRITER OPERATIONS</b> - Ability to support menu-driven report scheduling options.			x			
	10.005	<b>REPORT WRITER OPERATIONS</b> - Ability to generate error messages with a description of corrective actions.			x			
	10.006	<b>REPORT WRITER HELP</b> - Ability to support online instructions "help".			x			
	10.007	<b>REPORT WRITER DATA DICTIONARY IDENTIFICATION</b> - Ability to reference specific data items by field descriptive name (i.e., data dictionary field names and user-screen field names are the same).			x			
	10.008	<b>WILDCARD SEARCHES</b> - Ability to perform searches by using wildcards or partial information (e.g., searching for accounts, funds, cost centers, projects, etc.)			x			
	10.009	<b>REPORT CONDITIONING OPTIONS</b> - The following report writing capabilities need to include the ability to arithmetically calculate functions:						
	10.010	▪ Ability to generate reports using "include" and "exclude" statements.			x			
	10.011	▪ Ability to generate reports using "and" and "or" statements			x			
	10.012	▪ Ability to generate reports using "equal to", "less than", and "greater than" statements.			x			

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GIS	Comments
AD HOC RPT.	10.013	▪ Ability to use an "if-then-else" sequence within one query.						X
AD HOC RPT.	10.014	<b>REPORT FIELD SELECTION OPTIONS</b> - Ability to combine the use of multiple fields from multiple modules' database tables in a single query.			X			
AD HOC RPT.	10.015	<b>REPORT FILE REFRESHING</b> - Ability to store and recall items whose values are derived from other values in the data files.			X			
AD HOC RPT.	10.016	<b>ARITHMETIC FUNCTIONS</b> - Ability to support the use of arithmetic: "addition", "subtraction", "multiplication", and "division" calculations.			X			
AD HOC RPT.	10.017	<b>BASIC STATISTICAL FUNCTIONS</b> - Ability to support mean and standard deviations and to build cross tabulations.						X
AD HOC RPT.	10.018	<b>PDF FOLDERS</b> - Ability to setup auto save folders by type of report when using a pdf writer tool.			X			
AD HOC RPT.	10.019	<b>REPORT COLUMN DEFINITION</b> - Ability to support default or special column headings.			X			
AD HOC RPT.	10.020	<b>REPORT SELECTION OPTIONS</b> - Ability to query on any element of a transaction history file, including the type of transaction and the process that originated the transaction.			X			
AD HOC RPT.	10.021	<b>REPORT FIELD EDIT DEFINITION</b> - Ability to support unique field editing (i.e., currency, symbol, commas, decimal places, etc.) on specific data items.			X			
AD HOC RPT.	10.022	<b>REPORT SORTING OPTIONS</b> - Ability to support major and minor sort options.			X			
AD HOC RPT.	10.023	<b>REPORT SUBTOTALS</b> - Ability to support subtotal and total options by field.			X			
AD HOC RPT.	10.024	<b>REPORT SORTING AND TOTALING OPTIONS</b> - Ability to choose various sorting options and report totaling options with appropriate subtotalling based on selected sort option.			X			
AD HOC RPT.	10.025	<b>GRAPHS/CHARTS ON REPORTS</b> - Ability to print graphs and charts on reports.			X			
AD HOC RPT.	10.026	<b>REPORT SPECIFICATIONS</b> - Ability to include the following on all reports:			X			
AD HOC RPT.	10.027	▪ Organization Name			X			
AD HOC RPT.	10.028	▪ Report Title			X			
AD HOC RPT.	10.029	▪ User That Generated Report			X			
AD HOC RPT.	10.030	▪ Column Heading Descriptions			X			
AD HOC RPT.	10.031	▪ Processing Date			X			
AD HOC RPT.	10.032	▪ Sequentially Numbered Pages			X			
AD HOC RPT.	10.033	▪ Subtotals at Each Level Break			X			
AD HOC RPT.	10.034	<b>SAVE REPORT SETTINGS</b> - Ability to save and reuse report settings on future report runs.			X			
AD HOC RPT.	10.035	<b>ELECTRONICALLY FILE REPORTS</b> - Ability to electronically save reports for subsequent users' access (e.g. on an internal intranet page, user dashboard or report menu, etc.).			X			

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
	10.036	<b>REPORT SCHEDULING</b> - Ability to report scheduling along with email distribution for recipients, as well as re-occurrence options of specific days, weeks, weekly, monthly, etc.			x				
	10.037	<b>REPORT OUTPUT SELECTION</b> - Ability to support user specification of the output media (i.e., printer, display on screen, save to file).	x						
	10.038	<b>CLOUD BASED REPORTING</b> - Ability to download a report created under a Cloud based deployment or maintain an unlimited amount of storage for Cloud-created reports.	x						<b>1 TB of cloud storage is provided with additional blocks of 500 GB that can be purchased</b>
	10.039	<b>LARGE REPORT TO PRINT WARNING</b> - Ability to warn the user they are about to print a large report (displays number of pages).	x						Browser/Device specific error message will be prompted
	10.040	<b>PRODUCE STANDARD REPORTS</b> - Ability to export report data to Microsoft Word, Microsoft Excel, and PDF formats.	x						
	10.041	<b>DISPLAY PRINTER QUEUES PRIOR TO PRINTING</b> - Ability to view or print reports, as an option.	x						
	10.042	<b>PRINTING TO "SAVE" REPORTS TO OUTPUT QUEUES</b> - Ability for printed output to be queued to any of the system or network printers.	x						
	10.043	<b>CANNED REPORTS</b> - System comes with standard "canned" reports that include, but not limited to Permits Issued, Census Report Data, Building Reports, Public Works Reports, Code Enforcement Reports, Planning Reports, License Registration Reports, and User Reports, with the ability to select a timeframe for data to be included in report.	x						
	10.044	<b>INTEGRATIONS AND INTERFACES</b>							
	10.045	<b>INTEGRATION - THIRD PARTY REPORT WRITERS</b> - Ability to integrate with third-party report writing tools, such as Crystal Reports, SSRS, or Cognos etc.	x						Cognos is a custom integration. Accela provides Accela Insights that is powered by Microsoft Power BI as an analytical dashboard tool
	10.046	<b>SAAS/CLOUD HOSTING REPORTING</b>							
	10.047	<b>REPORTING - CUSTOM REPORTS</b> - Ability to allow users to create custom reports through the cloud-hosted solution interface.	x						
	10.048	<b>DOWNLOAD REPORTS</b> - Ability to download reports from the cloud-hosted application.	x						
	10.049	<b>REPORTING - STORAGE</b> - Ability to have an unlimited amount of storage for reports in the cloud. <i>Vendor Note - please use comments field to denote any limitations.</i>	x						1 TB of cloud storage is provided with additional blocks of 500 GB that can be purchased
	10.050	<b>DATA EXTRACTS</b> - Ability to extract data from cloud hosted solution.	x						

# City of San Bernardino - Land Management System - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

## Legend:

<b>Standard - Current</b>	Available in current software release
<b>Standard - Next Release</b>	Guaranteed available in next release of software
<b>Report Writer</b>	Report Writer function through Standard Reports or Ad Hoc Report Writer
<b>3rd-Party Application</b>	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
<b>Custom Modification</b>	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
<b>Not Available</b>	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
<b>General System and Security</b>									
<b>GENERAL FEATURES</b>									
SYS/SECURITY	11.001	<b>PERSON/ENTITY</b> - Ability to maintain central person/entity record identification information throughout all modules (e.g., Planning, Permitting, Business Licensing, etc.).	x						
SYS/SECURITY	11.002	<b>MULTI-USER ENVIRONMENTS</b> - Ability to prevent any master file record from being deleted if that record is referenced in any other file.	x						Accela is a user role based system, users with certain privilidges can have the option to delete master file records and users w/o those privilidges cannot delete master/related records
SYS/SECURITY	11.003	<b>MULTI-USER ENVIRONMENTS</b> - Ability to operate in a multi-user environment so record locking will be required to maintain the integrity of the data.	x						Accela is a user role based system, users with certain privilidges can have the option to delete master file records and users w/o those privilidges cannot delete master/related records
SYS/SECURITY	11.004	<b>ONLINE TRAINING DOCUMENTATION</b> - Ability to access to printable training materials and other support documentation online.	x						
SYS/SECURITY	11.005	<b>USER DASHBOARDS</b> - Ability to incorporate real-time individual user dashboard capability to display dynamic charts, graphs, and data lists.	x						
SYS/SECURITY	11.006	<b>FORWARD/BACKWARD NAVIGATION</b> -Ability to navigate through records or files on a screen in a forward or backward direction.	x						
SYS/SECURITY	11.007	<b>MULTISCREEN NAVIGATION</b> - Ability to view data across multiple screens.	x						



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
SYS/SECURITY	11.008	<b>NUMBER OF RECORDS DISPLAYED</b> - Ability to allow users to change the number of records displayed as a result of a search (e.g., 20, 50, 100, etc.).	x						
SYS/SECURITY	11.009	<b>RENAME LABELS</b> - Ability for authorized users to rename field labels.	x						
SYS/SECURITY	11.010	<b>REQUIRED FIELDS</b> - Ability to designate both standard and user-defined fields as requiring data entry.	x						
SYS/SECURITY	11.011	<b>AUTO-FILL FIELDS</b> - Ability to automatically populate fields (e.g., selecting a street segment from GIS pulls street name). <b>Vendor Note</b> - please use comments field to describe extent of functionality.	x						
SYS/SECURITY	11.012	<b>FILE EXPORT FORMATS</b> - Ability to export files using the following file format types:	x						
SYS/SECURITY	11.013	▪ PDF	x						
SYS/SECURITY	11.014	▪ Word	x						
SYS/SECURITY	11.015	▪ Excel	x						
SYS/SECURITY	11.016	▪ Comma Delimited Values	x						
SYS/SECURITY	11.017	<b>MAINTAIN AUDIT TRAILS</b> - Ability to maintain audit trails including changed by, changed date, and record of changes.	x						
SYS/SECURITY	11.018	<b>HISTORICAL DATA</b> - Ability to maintain more than 10 years of historical transactional data. <b>Vendor Note</b> - please use comments field to denote any limitations.	x						
SYS/SECURITY	11.019	<b>FAVORITES MENU</b> - Ability to assign menu items to a favorites menu.	x						
SYS/SECURITY	11.020	<b>LIST OF RECENT RECORDS</b> - Ability for a user to see a list of records they recently created/viewed/modified from their dashboard.	x						
SYS/SECURITY	11.021	<b>ERROR REPORT SUBMISSIONS</b> - Ability to directly submit system generated error reports and messages to vendor software support.						x	
SYS/SECURITY	11.022	<b>VENDOR SUPPORT ACCESS TO CLIENT</b> - Ability for the vendor to connect to computer server for diagnosis and resolution of software problems.	x						
SYS/SECURITY	11.023	<b>BATCH PROCESSES</b> - Ability to run specific assigned jobs, by permission, in a batch process.	x						
SYS/SECURITY	11.024	<b>MASS UPDATES</b> - Ability to load and run mass additions, updates, deletions and purges in the system.	x						
SYS/SECURITY	11.025	<b>MASS UPDATES SYSTEM BACKUP UTILITIES AND PROCESSES</b> -Ability to provide flexible backup utilities enabling the backup of individual items, application databases or the entire system.	x						
SYS/SECURITY	11.026	<b>THIRD-PARTY INTERFACES</b> - Ability to run and load third-party interfaces into the system.						x	
SYS/SECURITY	11.027	<b>EMAIL INTEGRATION</b> - Ability to send emails from system utilizing standard SMTP protocols.	x						



Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer				Comments
SYS/SECURITY	11.028	<b>OFFICE 365 EMAIL INTEGRATION</b> - Ability to send and receive emails using Office 365.							
SYS/SECURITY	11.029	<b>WEB AND MOBILE APPLICATIONS</b> - Ability for web and mobile applications to use mobile responsive design for optimized usability on a variety of screen sizes, including smart-phones, tablets, laptops, and desktops.	x						
SYS/SECURITY	11.030	<b>SYSTEM SECURITY</b>							
SYS/SECURITY	11.031	<b>GENERAL SECURITY FEATURES</b> - Ability to provide access security by:	x						
SYS/SECURITY	11.032	▪ Application	x						
SYS/SECURITY	11.033	▪ Field level	x						
SYS/SECURITY	11.034	▪ Menu item/function within application	x						
SYS/SECURITY	11.035	<b>PASSWORD ENCRYPTION</b> - Ability to provide password encryption. <i>Vendor Note - please describe your level and implementation of encryption in the comment field.</i>	x						
SYS/SECURITY	11.036	<b>PASSWORD RECOVERY</b> - Ability for user self-password recovery capability.	x						
SYS/SECURITY	11.037	<b>SECURITY ACCESS PASSWORD CHANGE</b> - Ability to maintain the date of last password change for each user.	x						
SYS/SECURITY	11.038	<b>RESTRICT SECURITY ACCESS OF SELECTED TRANSACTIONS</b> - Ability to restrict entry of certain transactions by password or access rights.	x						
SYS/SECURITY	11.039	<b>SECURITY ACCESS CONTROL</b> - Ability to assign view only access to specific user profiles.	x						
SYS/SECURITY	11.040	<b>PERMISSIONS</b> - Ability to specify read, write, edit and delete permissions.	x						
SYS/SECURITY	11.041	<b>RESTRICT SECURITY ACCESS</b> - Ability to restrict users' access to specific screens and to perform certain functional processes (e.g., refunding fees).	x						
SYS/SECURITY	11.042	<b>RESTRICT ACCOUNT ACCESS</b> - Ability to restrict users' ability to enter transactions based on agency-defined components of the chart of accounts (e.g., fund, department, division, object).	x						
SYS/SECURITY	11.043	<b>REPORT WRITING TOOLS ACCESS</b> - Ability to allow only specific users to access report writing and query tools.	x						
SYS/SECURITY	11.044	<b>UPDATE CONTROLS</b> - Ability to add and update module configurations as outlined in security roles by permission.	x						
SYS/SECURITY	11.045	<b>CREATE SECURITY PROFILE BY COPYING EXISTING PROFILE</b> - Ability to create new user rights by copying another user's right levels and modifying.	x						
SYS/SECURITY	11.046	<b>GROUP CREATION/CONTROL</b> - Ability to create groups of users by a role type and to apply/change access rights to groups of users.	x						
SYS/SECURITY	11.047	<b>USER/GROUP ACCESS CONTROL</b> - Ability to modify a user's or group of users' log-in access status (e.g., active, inactive, on-hold, etc.) .	x						

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	GA	Comments
SYS/SECURITY	11.048	<b>LOG-OFF USER - INACTIVITY</b> - Ability for the system to automatically log-off a user after a long period of inactivity. <b>Vendor Note</b> - <i>period of inactivity to be agency-defined.</i>	x					
SYS/SECURITY	11.049	<b>FORCE USER LOG-OFF</b> - Ability for a system administrator to log-off a user from the system.	x					
SYS/SECURITY	11.050	<b>SINGLE SIGN-ON - ACTIVE DIRECTORY</b> - Ability to implement Single Sign-on and Active Directory.	x					
SYS/SECURITY	11.051	<b>USER AUTHENTICATION</b> - Ability to support mixed mode authentication - (i.e., if Active Directory integration is enabled, still allow non-AD user accounts to login).	x					
SYS/SECURITY	11.052	<b>USER AUTHENTICATION</b> - Ability to provide added layer of security via Two-Factor Authentication (2FA), which requires a user to submit additional authentication along with their username and password.	x					Accela has standard integrations for user authentication with Okta and MS Azure.
SYS/SECURITY	11.053	▪ 2FA support for U2F authentication, such as Yubikey						
SYS/SECURITY	11.054	▪ 2FA support for strong tamper-proof solution, like Duo Mobile App						
SYS/SECURITY	11.055	▪ 2FA biometric support (e.g., finger print, facial recognition, etc.)						
SYS/SECURITY	11.056	<b>SAAS/CLOUD HOSTING SECURITY AND ACCESS</b>						
SYS/SECURITY	11.057	<b>REST API</b> - Ability to provide a REST API interface to facilitate integration with third-party applications.	x					
SYS/SECURITY	11.058	<b>AGENCY-DEFINED FIELDS</b> - Ability to add/delete agency-defined fields.	x					
SYS/SECURITY	11.059	<b>OUTSIDE NETWORK ACCESS</b> - Ability to access system outside of City network (e.g., third-party contractor).	x					
SYS/SECURITY	11.060	<b>BACKUP ENCRYPTION</b> - Ability to encrypt all data backups. <b>Vendor Note</b> - <i>provide level of encryption in in the comments column.</i>	x					
SYS/SECURITY	11.061	<b>DATABASE ENCRYPTION</b> - Ability to encrypt data from all databases when at rest (stored). <b>Vendor Note</b> - <i>provide level of encryption in the comments column.</i>	x					
SYS/SECURITY	11.062	<b>DATA CENTER RESILIENCY</b> - Ability to maintain resilient data centers resulting in zero customer downtime in the event of a failure or compromise of one data center.	x					
SYS/SECURITY	11.063	<b>GOVERNMENT CERTIFIED CLOUD PROVIDER</b> - Ability for the cloud application to be hosted by a government certified cloud provider.					x	Accela is hosted on MS Azure Commercial
SYS/SECURITY	11.064	<b>ALLOCATED INTERNET BANDWIDTH &amp; INTERNET RESILIENCY</b> - Ability to maintain multiple connections from multiple internet providers with automatic failover at each data center.	x					
SYS/SECURITY	11.065	<b>SLA UPTIME</b> - Ability to maintain a SLA Uptime of 99.9% or greater.	x					
SYS/SECURITY	11.066	<b>SOC 2 REPORT</b> - Ability to provide a SOC 2 report outlining data center security available upon request	x					

## Appendix B VENDOR PROFILE

**Vendor(s) Name: Accela, Inc.**

### SOFTWARE VENDOR INFORMATION

Company Name	Accela, Inc
Street Address	2633 Camino Ramon
City, State, Zip code	San Ramon, CA 94583
Telephone Number	Ph: 925-659-3200
Primary Contact	Arielle Mallen
Secondary Contact (if applicable)	Kyle Bockwoldt

### RESELLER INFORMATION (if applicable)

Company Name	Not applicable
Street Address	Not applicable
City, State, Zip code	Not applicable
Telephone Number	Not applicable
Primary Contact	Not applicable
Secondary Contact (if applicable)	Not applicable

### SOFTWARE SUPPORT

Location of Application Software Support Personnel	California and Utah
Number of Application Software Support Personnel <b>(Proposed Solution ONLY)</b>	50+
Support Hours (designate time zone)	4 a.m. until 6 p.m. Pacific Standard Time, Monday through Friday, excluding Accela's observed holidays.
Guaranteed Response Time	Typical Response Time : 1 Hour
Average Response Time	Typical Response Time : 1 Hour
Average Resolution Time	The majority of our support-owned cases, approximately 70%, are resolved within a 10-day timeframe.
800 Number Access	888 - 722 - 2352

### SOFTWARE SUPPORT (if applicable)

Location of Application Software Support Personnel	Not applicable
Number of Application Software Support Personnel <b>(Proposed Solution ONLY)</b>	Not applicable
Support Hours (designate time zone)	Not applicable
Guaranteed Response Time	Not applicable
Average Response Time	Not applicable
Average Resolution Time	Not applicable
800 Number Access	Not applicable

## Appendix C

### VENDOR PROFILE / FINANCIAL INFORMATION

**Vendor(s) Name: Accela, Inc.**

#### VENDOR INFORMATION

Vendor Name	Accela
Number of Years in Business	40+
Total Number of Employees (Proposed Solution ONLY)	500+
Organization Classification (Private, Public, Other)	Private

#### RESELLER INFORMATION (if applicable)

Reseller Name	Not applicable
Number of Years in Business	Not applicable
Total Number of Employees (Proposed Solution ONLY)	Not applicable
Organization Classification (Private, Public, Other)	Not applicable

#### VENDOR FINANCIAL INFORMATION

Annual Revenue	Confidential. Please see statement below.
Percent of Annual Revenue Allocated to R & D	Confidential. Please see statement below.
Percent of Annual Revenue Generated from New Sales	Confidential. Please see statement below.
Percent of Annual Revenue from Annual Recurring Income	Confidential. Please see statement below.

#### RESELLER FINANCIAL INFORMATION (if applicable)

Annual Revenue	Not applicable
Percent of Annual Revenue Allocated to R & D	Not applicable
Percent of Annual Revenue Generated from New Sales	Not applicable
Percent of Annual Revenue from Annual Recurring Income	Not applicable

*Appendix D*  
VENDOR CUSTOMER BASE

**Vendor(s) Name: Accela, Inc.**

BY THE FOLLOWING CRITERIA		Information Vendor		Information Reseller	
		NUMBER OF AGENCY CUSTOMERS	NUMBER OF AGENCY CUSTOMERS IN CALIFORNIA	NUMBER OF AGENCY CUSTOMERS	NUMBER OF AGENCY CUSTOMERS IN CALIFORNIA
Total - All Entities	<b>Proposed Solution Only</b>	<b>600+</b>	<b>229</b>	<b>N/A</b>	<b>N/A</b>
Total - Municipalities		<b>600+</b>	<b>218</b>	<b>N/A</b>	<b>N/A</b>
Populations Below 100,000		<b>150+</b>	<b>89</b>	<b>N/A</b>	<b>N/A</b>
Populations Between 100,000-300,000		<b>220</b>	<b>64</b>	<b>N/A</b>	<b>N/A</b>
Populations Above 300,000		<b>280</b>	<b>65</b>	<b>N/A</b>	<b>N/A</b>
Planning Projects		<b>600+</b>	<b>200+</b>	<b>N/A</b>	<b>N/A</b>
Permitting		<b>600+</b>	<b>200+</b>	<b>N/A</b>	<b>N/A</b>
Online Portal		<b>550+</b>	<b>200+</b>	<b>N/A</b>	<b>N/A</b>
Inspections		<b>500+</b>	<b>200+</b>	<b>N/A</b>	<b>N/A</b>
Code Enforcement		<b>255</b>	<b>85+</b>		
Request Management		<b>180</b>	<b>65+</b>	<b>N/A</b>	<b>N/A</b>
Business Licensing		<b>165</b>	<b>45+</b>	<b>N/A</b>	<b>N/A</b>
Mobile Inspections and Code Enforcement		<b>300+</b>	<b>100+</b>	<b>N/A</b>	<b>N/A</b>

*Appendix E*  
VENDOR/RESELLER REFERENCES

**Vendor Name: Accela, Inc.**

**Proposed Solution Only (Below)**

	Customer Name	Contact Name	Phone Number	Population	Installation Date	APPLICATIONS (please list)
	<b>Note: If you are a Reseller/VAR, clearly indicate which references are for your specific company.</b>					
1)	City of Eastvale, CA*	Johnny Terfeher	951-703-4482	72000	20-Oct	Accela Building, Planning, Code Enforcement, Public Works
2)	City of Moreno Valley, CA*	Kimberlee Kreuger	951-413-3428	212000	22-Feb	Accela Building, Planning, Code Enforcement, Public Works
3)	City of Rancho Cucamonga, CA*	Kramer Sandars	951-413-3429	175,000	18-Jun	Accela Building, Planning, Code Enforcement, Public Works
4)	City of Anaheim, CA*	Jennifer Winchell	714-765-5131	350000	22-Oct	Accela Building, Planning, Code Enforcement, Public Works, Bus Lic
5)	City of Oakland, CA	Annie He	510-238-6142	440000	19-Jun	Accela Building, Planning, Code Enforcement, Public Works
6)	City of Sacramento, CA	Johann Tran	916-808-4742	528000	19-Jan	Accela Building, Planning, Code Enforcement, Public Works
7)	City of Santa Clara, CA	Andrew Raj	408-615-2472	126000	20-Jun	Accela Building, Planning, Code Enforcement, Public Works
8)	City of San Diego, CA	JC Thomas	619-236-6552	1300000	19-Jan	Accela Building, Planning, Code Enforcement, Public Works
9)	City of Fresno, CA	Edith Smith	559-621-7136	545000	21-Jun	Accela Building, Planning, Code Enforcement, Public Works
10)	City of Stockton, CA	Robert Liddicoat	209-937-8561	321000	19-May	Accela Building, Planning, Code Enforcement, Public Works

**Note: Please indicate which module(s) were implemented in the "Application" column**

## Appendix F

**Vendor Name: Accela, Inc.**

## GENERAL QUESTIONS

- |   | Yes | No |
|---|-----|----|
| 1) Will you agree to incorporate RFP and your proposal into the contract?                                   | X   |    |
| 2) Will you hold prices firm for 180 days from proposal due date?   | X   |    |
| 3) Is the source code held in escrow at a third-party institution? If yes, please identify the third party. |     | X  |
| <b>Explain:</b><br>Accela does not provide escrow services for SaaS customers.                              |     |    |
| 4) Will the application software license be a "license in perpetuity?"                                      |     | X  |

## SYSTEM SUPPORT INFORMATION

- |    |  | Yes | No       |
|----|--|-----|----------|
| 5) | Can the vendor remotely connect to the system for diagnostics and/or support? Is there an associated cost? | X   | No addit |
| 6) | Is there a website for customer software updates?  | X   |          |
| 7) | Can the website be used to communicate support issues and downloads?                                       | X   |          |
| 8) | Is there an application software Users' Group?   | X   |          |

## SOFTWARE APPLICATION INFORMATION

- 9) On what platform(s)/operating system(s) will the proposed application software run?
- Response:
- 
- The Accela Civic Platform is hosted in Microsoft Azure. It uses the latest versions of Microsoft operating systems, applications and services.
- 
- 10) What year was the current technology platform of the proposed software originally released (e.g. .NET in 2010)?
- Response:
- 
- Accela Civic Platform stack was moved to Microsoft Azure in 2019 to provide our customer with the best stability, reliability, security, redundant and business user technologies. Twice a year the current technology platform is updated for the business benefits of our 600+ customers

*Appendix F*  
**VENDOR GENERAL SYSTEM INFORMATION**

**Vendor Name: Accela, Inc.**

- 11) Which **database system** (preference towards MS SQL) will be deployed with the **proposed solution?** (include name and version)

Response:

MS SQL. The Accela Civic Platform is hosted in Microsoft Azure. It uses the latest versions of Microsoft operating systems, applications, and services.

- 12) Which **server software** (preference towards MS Windows Server) will be deployed with the **proposed solution?** (include server software name and version)

Response:

The Accela Civic Platform is hosted in Microsoft Azure. It uses the latest versions of Microsoft operating systems, applications and services.

- 13) Please describe the software upgrade process (e.g., frequency and level of effort and cost).

Response:

Accela's release cycle includes two major releases per year, monthly service packs, and hotfixes as needed. Full infrastructure patching occurs at least monthly. All updates to the solution for Accela SaaS customers are performed by Accela staff. Updates are included in annual SaaS subscription.

- 14) Please describe the software patch delivery process, frequency, and level of effort.

Response:

All updates to the solution for Accela SaaS customers are performed by Accela staff. Accela's release cycle includes two major releases per year, monthly service packs, and hotfixes as needed. Full infrastructure patching occurs at least monthly.



# Appendix G1

## On-Premise PROJECT COST ESTIMATES

Vendor Name: Accela, Inc.

### NOTES & INSTRUCTIONS

Supplemental Pricing in your company's standard format can be provided separately.  
 However, even if you provide supplemental pricing, this project costs worksheet must be completed for summary.  
 Additional rows and/or descriptions can be added if necessary.  
 If an item is included elsewhere, please say included.  
**DO NOT delete any rows or change any formulas**

### On-Premise One-Time Costs

							Informational Only		PRICE
							Hourly Rate	Total Hours	
Software License Fees									\$ -
Training Fees							\$ -	-	\$ -
Project Management							\$ -	-	\$ -
Installation/Implementation Fees							\$ -	-	\$ -
Modifications/Enhancements Estimates	(see Appendix J)						\$ -		\$ -
Interface Development Estimates	(see Appendix H)						\$ -		\$ 172,420
Conversion Assistance	(see Appendix I)						\$ -		\$ 351,500
Ad hoc Report & Inquiry Development (by vendor)							\$ -	-	\$ -
Other (please list as needed)									
Hardware/System Software (estimates, if applicable)									\$
Installation (if applicable)									\$
Other Costs (please list as needed)									\$
Travel & Related Expenses									\$
Taxes									\$
									\$ 523,920.00

### On-Premise Annual Recurring Costs

									PRICE
Application Annual Maintenance/Support									\$ -
Annual Maintenance/Support - Interfaces									\$ -
Hardware/System Software (estimates, if applicable)									\$ -
									\$ -

**Appendix G1**  
**On-Premise PROJECT COST ESTIMATES**

**Detailed Software Application Pricing and Information**

Vendor's Module Name	One-time License Costs	Implementation Services			Application Training Services			Annual Recurring Costs
		Total Hours	Total Visits	Total Implementation Services Costs	Total Hours	Total Visits	Total Training Costs	

*(Please List Applications/Modules - Add Rows as Necessary)*

<b>Land Management System</b>								
Planning Projects								
Permitting								
Online Portal								
Inspections								
Cashiering								
Code Enforcement								
Request Management								
Business Licensing								
Parcel / Address Management								
GIS Viewer/Portal								
Mobile Inspections and Code Enforcement								
<b>Other</b>								
Ad Hoc Reporting								
Interactive Voice Response (IVR)								
Electronic Plan Submittal and Review								
<b>Sub-Totals</b>	\$ -	-	-	\$ -	-	-	\$ -	\$ -

**NOTES**

- 1) Indicate how license fees are calculated (e.g., concurrent users, user ID's, processor size, etc.). Provide number of user licenses if applicable, and additional user license cost if required.
- 2) Please describe additional future license fees if applicable (e.g., change in users, processor size, etc.)
- 3) Optional pricing for above one time costs should be clearly identified (e.g., different project management service levels)
- 4) Describe number of days/hours included with project management AND training costs above
- 5) Describe in detail what is included with conversion estimates.
- 6) Describe how travel and related expense estimates were calculated
- 7) Describe additional costs required for optional applications (e.g., hardware, training, project management, etc.)
- 8) Clearly indicate third party software.
- 9) Please attach server sizing/configuration documentation.

*Appendix G2*  
*Cloud/Hosted* **PROJECT COST ESTIMATES**

Accela

## NOTES & INSTRUCTIONS

Supplemental Pricing in your company's standard format can be provided separately.  
However, even if you provide supplemental pricing, this project costs worksheet must be completed for summary evaluation.  
Additional rows and/or descriptions can be added if necessary.  
If an item is included elsewhere, please say included.  
**DO NOT delete any rows or change any formulas**

Vendor Hosted One-Time Costs	
Initial Setup	\$10,000
Integration	\$5,000
Training	\$2,000
Documentation	\$1,000
Testing	\$3,000
Deployment	\$1,000
Initial Support	\$2,000
Hardware	\$5,000
Software Licenses	\$10,000
Infrastructure	\$5,000
Security	\$2,000
Compliance	\$1,000
Legal	\$1,000
Marketing	\$1,000
Other	\$1,000
<b>Total</b>	<b>\$50,000</b>

							Informational Only		
							Hourly Rate	Total Hours	PRICE
One-Time Software License Fees ONLY (if applicable) - Not annual subscription fees									\$
Training Fees						\$	185	420.00	\$ 77,700
Project Management						\$	185	2,552.00	\$ 472,120
Installation/Implementation Fees						\$	185		\$ 1,175,860
Modifications/Enhancements Estimates	(see Appendix J)					\$	185		\$ -
Interface Development Estimates	(see Appendix H)					\$	185		\$ 172,420
Conversion Assistance	(see Appendix I)					\$	185		\$ 351,500
Report & Inquiry Development						\$	185	480.00	\$ 88,800
Other (please list as needed)						\$	-	-	\$ -

[illegible]

Vendor Hosted Annual Recurring Costs	
1. Software License	\$10,000
2. Support	\$5,000
3. Training	\$2,000
4. Maintenance	\$1,000
5. Other	\$0
<b>Total</b>	<b>\$18,000</b>

[illegible]

Annual Maintenance/Support - Interfaces									\$	128,900.00
Hardware/System Software (estimates, if applicable)									\$	-
									\$	450,164.00

*Appendix G2*  
*Cloud/Hosted* PROJECT COST ESTIMATES

**Detailed Software Subscription Pricing and Information**

	Vendor's Module Name	One-time Subscription Costs	Implementation Services			Training Services			Annual Recurring Costs
			Total Hours	Total Visits	Total Implementation Services Costs	Total Hours	Total Visits	Total Training Costs	
(Please List Applications/Modules - Add Rows as Necessary)									
Land Management System									\$ 321,264.00
Planning Projects									
Permitting									
Online Portal									
Inspections									
Cashiering									
Code Enforcement									
Request Management									
Business Licensing									
Parcel / Address Management									
GIS Viewer/Portal									
Mobile Inspections and Code Enforcement									
Other									
Ad Hoc Reporting									
Interactive Voice Response (IVR)									
Electronic Plan Submittal and Review									
UAT									
Go Live									
Sub-Totals		\$ -	5,356.00	-	\$ 1,175,860	420.00	-	\$ 77,700	\$ 350,043

**NOTES**

- 1) Indicate how license fees are calculated (e.g., concurrent users, user ID's, processor size, etc.). Provide number of user licenses if applicable, and additional user license cost if required.
- 2) Please describe additional future license fees if applicable (e.g., change in users, processor size, etc.).
- 3) Please provide a five-year initial term for your vendor-hosted service.
- 4) Optional pricing for above one time costs should be clearly identified (e.g., different project management service levels).
- 5) Describe number of days/hours included with project management AND training costs above.
- 6) Describe in detail what is included with conversion estimates.
- 7) Describe how travel and related expense estimates were calculated.
- 8) Describe additional costs required for optional applications (e.g., hardware, training, project management, etc.)
- 9) Clearly indicate third party software.

*Appendix G2*  
*Cloud/Hosted* **PROJECT COST ESTIMATES**

10) Please attach server sizing/configuration documentation.

## Appendix H

Interfaces/Integrations Name	Description	Interface Direction(s) (One-way or Two-way)	Third-Party Software (Vendor Name, Product Name, & Version)	Frequency / Real-Time Active (As Needed, Scheduled or Real-time)	Integration Type (Import or Export)	Vendor Comments/ Suggestions	Cost Estimate (Low)	Cost Estimate (High)	Annual Support Costs (If Applicable)
------------------------------	-------------	--	---	---	--	------------------------------	------------------------	-------------------------	--------------------------------------

Please provide both low and high estimated cost

Land Management									
Cashiering & Online Payments	Cash receipts should validate permit number, account number, fees, penalty amounts, and update customer balance.								
Customer Internet Payments	Online payments with provider "All Paid"								
Customer Over the Counter Payments	In person payments								
Enterprise Financial System	Provide the automatic generation of journal entries to the general ledger, ensuring auto updates to the accounts receivable and accounts payable accounts.								
Electronic Plan Submittals	Ability to receive plan submittals electronically through the Agency's website.								
Contractor Information	Ability to extract contractor information from the state licenses board and populate fields in permit modules contractor database.								
Inspections (including mobile)	Ability to integrate with an interactive voice response system for inspection scheduling, status updates, and payments.								
Others									
Email Integration	Ability to send emails from system utilizing standard SMTP protocols.								
Single Sign-On / Active Directory	Support of Single-Sign-On and Active Directory.								
Ad Hoc Third-Party Report Writers	Ability to integrate with third party report writers.								
SQL Server Reporting Services	Integrate SSRS Reporting Services into the Application for documents and statistical reporting needs.								
Agenda Software	System should integrate with PrimeGov to generate agendas.								
Electronic Content Management System	System must integrate with Laserfiche.								
Electronic Document Signatures	Integrate electronic signatures with DocuSign and Adobe Sign.								
GIS & GIS Mapping (ESRI ArcGIS)	Ability to interface with GIS mapping products that support Esri formats.								
GIS - View GIS Data	Query, view, and interact with GIS data within the application.								

GIS - Auto Sync GIS Changes	Automatically synchronize any changes from GIS with the system.						
GIS - Secure Service Support	Consume data through secured services.						
GIS - Feature Services	Consume and edit GIS data through Feature Services.						
Two-Factor Authentication (2FA)	Support Two-Factor Authentication (2FA).						



## Appendix H

[illegible]

## Appendix I

[illegible]

--	--	--	--	--	--	--	--	--



## Appendix J

### MODIFICATION COSTS

Modifications <small>(please list as needed)</small>	Low Estimate	High Estimate	Vendor Comments/ Suggestions
<i>If you have included a modification in Appendix A, please provide both low and high estimated costs for those</i>			Not applicable
	\$ -	\$ -	



9110 Alcosta Blvd, Suite H #3030  
San Ramon, CA, 94583

Proposed by: Arielle Mallen  
Contact Phone: +1 7326006638  
Contact Email: amallen@accela.com  
Quote ID: Q-34621  
Valid Through: 12/31/2024  
Currency: USD

## Order Form

### Address Information

#### Bill To:

City of San Bernardino  
300 North D. Street - 4th Floor  
San Bernardino, California 92418  
United States

#### Ship To:

City of San Bernardino  
300 North D. Street - 4th Floor  
San Bernardino, California 92418  
United States

Billing Name: Rolland Kornblau  
Billing Phone: 909-384-5947 x3017  
Billing Email: kornblau\_ro@sbcity.org

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 1	12/1/2024	11/30/2025	12	\$1,150.00	160	\$184,000.00
> Accela Building - SaaS	Year 1	12/1/2024	11/30/2025	12	\$0.00	160	\$0.00
> Accela Planning - SaaS	Year 1	12/1/2024	11/30/2025	12	\$0.00	160	\$0.00
Enhanced Reporting Database (ERD)	Year 1	12/1/2024	11/30/2025	12	\$0.00	1	\$0.00
TOTAL:							\$184,000.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 2	12/1/2025	11/30/2026	12	\$1,600.00	160	\$256,000.00
> Accela Building - SaaS	Year 2	12/1/2025	11/30/2026	12	\$0.00	160	\$0.00
> Accela Planning - SaaS	Year 2	12/1/2025	11/30/2026	12	\$0.00	160	\$0.00
Enhanced Reporting Database (ERD)	Year 2	12/1/2025	11/30/2026	12	\$33,280.00	1	\$33,280.00
TOTAL:							\$289,280.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 3	12/1/2026	11/30/2027	12	\$1,680.00	160	\$268,800.00
> Accela Building - SaaS	Year 3	12/1/2026	11/30/2027	12	\$0.00	160	\$0.00
> Accela Planning - SaaS	Year 3	12/1/2026	11/30/2027	12	\$0.00	160	\$0.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Enhanced Reporting Database (ERD)	Year 3	12/1/2026	11/30/2027	12	\$34,944.00	1	\$34,944.00
<b>TOTAL:</b>							\$303,744.00

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 4	12/1/2027	11/30/2028	12	\$1,764.00	160	\$282,240.00
> Accela Building - SaaS	Year 4	12/1/2027	11/30/2028	12	\$0.00	160	\$0.00
> Accela Planning - SaaS	Year 4	12/1/2027	11/30/2028	12	\$0.00	160	\$0.00
Enhanced Reporting Database (ERD)	Year 4	12/1/2027	11/30/2028	12	\$36,691.20	1	\$36,691.20
<b>TOTAL:</b>							\$318,931.20

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 5	12/1/2028	11/30/2029	12	\$1,852.20	160	\$296,352.00
> Accela Building - SaaS	Year 5	12/1/2028	11/30/2029	12	\$0.00	160	\$0.00
> Accela Planning - SaaS	Year 5	12/1/2028	11/30/2029	12	\$0.00	160	\$0.00
Enhanced Reporting Database (ERD)	Year 5	12/1/2028	11/30/2029	12	\$38,525.76	1	\$38,525.76
<b>TOTAL:</b>							\$334,877.76

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 6	12/1/2029	11/30/2030	12	\$1,944.81	160	\$311,169.60
> Accela Building - SaaS	Year 6	12/1/2029	11/30/2030	12	\$0.00	160	\$0.00
> Accela Planning - SaaS	Year 6	12/1/2029	11/30/2030	12	\$0.00	160	\$0.00
Enhanced Reporting Database (ERD)	Year 6	12/1/2029	11/30/2030	12	\$40,452.05	1	\$40,452.05
<b>TOTAL:</b>							\$351,621.65

Services	Year	Start Date	End Date	Term (Months)	Price	Qty	Net Total
Multi Solution User	Year 7	12/1/2030	11/30/2031	12	\$2,042.05	160	\$326,728.08
> Accela Building - SaaS	Year 7	12/1/2030	11/30/2031	12	\$0.00	160	\$0.00
> Accela Planning - SaaS	Year 7	12/1/2030	11/30/2031	12	\$0.00	160	\$0.00
Enhanced Reporting Database (ERD)	Year 7	12/1/2030	11/30/2031	12	\$42,474.65	1	\$42,474.65
<b>TOTAL:</b>							\$369,202.73

**Pricing Summary**

Period	Net Total
Year 1	\$ 184,000.00
Year 2	\$ 289,280.00
Year 3	\$ 303,744.00
Year 4	\$ 318,931.20
Year 5	\$ 334,877.76
Year 6	\$ 351,621.65
Year 7	\$ 369,202.73
<b>Total</b>	<b>\$ 2,151,657.34</b>

**Additional Terms:**

1. No additional or conflicting terms or conditions stated in Customer's order documentation, including purchase orders, will be incorporated into or form any part of this Order Form or the governing agreement, and all such terms or conditions will be null.
2. This Order Form, including any OnPrem Licenses, Maintenance and Support, and Subscription Services, Enhanced Reporting Database and Managed Application Services will be governed by the applicable terms and conditions. If those terms and conditions are non-existent, have expired, do not apply or have otherwise been terminated, the following terms at <https://www.accela.com/terms/> will govern as applicable, based on the Customer's purchase.
3. All Software Licenses, Maintenance, and Subscription purchases are non-cancelable and non-refundable.
4. If Customer has a prior agreement with Accela, and this purchase is co-terming with that prior agreement, if the start date on this Order Form is before the actual delivery date of the purchase, Accela may pro-rate this purchase so that it can co-term with the prior agreement.
5. If this Order Form is executed and/or returned to Accela by Customer after the Order Start Date above, Accela may adjust the Order Start Date and Order End Date without increasing the total price based on the date Accela activates the products and provided that the total term length does not change.
6. Pricing is based upon payment by ACH or check. Payment by credit card (including Purchase Cards) for product and services in this Order Form will be subject to a service charge of 3%. There is no service charge for ACH or check payment.
7. Enhanced Reporting Database pricing is based on a percentage of Customers SaaS Annual Contract Value if applicable. As SaaS Annual Contract Value increases/decreases based on seat count changes or annual uplift ERD pricing will be adjusted accordingly at contract renewal.
8. The prepayment amount for years 1 and 2 of the order is \$473,280. Years 3 through 7 will be billed annually thereafter.



Signatures	
Accela, Inc.	Customer
Signature: <div><div>Signed by:</div><div> 73668EE5EB274C8...</div></div>	Signature:
Print Name:  Michael E Gigliello	Print Name:
Title:  Controller	Title:
Date:  10/24/2024	Date: