<u>EXHIBIT A</u>

STATEMENT OF WORK FOR

# FRESNO, CA

ACCELA CIVIC PLATFORM CANNABIS
MODULE PLEMENTATION SERICES
(1230007670

Byrne Software Technologies, Inc.

November 2, 2022

# Table of Contents

## DOCUMENT CONTROL

| Date | Author | Version | Change Reference |
|------|--------|---------|------------------|
| 03/28/2022 | Amber Digenan | 1.0 | Initial document |
| 03/28/2022 | David Avila | 1.1 | Revisions/Corrections |
| 10/25/2022 | David Avila | 1.2 | Revisions and Updates for RFQ |

## INTRODUCTION
## OVERVIEW

This proposed implementation by Byrne Software of the Accela product is designed specifically to meet the requirements defined by Fresno, CA ("Agency"). Byrne Software is proposing to utilize the Accela Standard Package Solution Implementation Methodology, to promote a successful project that will meet the Agency's objectives. The following Accela products will be implemented: Cannabis Permitting and Licensing Module. The following Statement of Work will detail how Byrne Software will implement the software, including the major milestones and deliverables that will ensure your success.

Byrne Software is committed to providing a superior solution and deployment of Accela, for the current and future needs of Fresno.  Byrne Software will work with Agency staff to optimize Accela's portfolio of software, best practices, and customer experience to enable the Agency to successfully deploy the Cannabis solution in Accela. This Statement of Work ("SOW") sets forth a scope and definition of the consulting/professional services, work and/or project (collectively, the "Services") to be provided by Byrne Software to Fresno.

## CRITICAL SUCCESS FACTORS

In order to successfully execute the services described herein, there are several critical success factors for the project that must be closely monitored and managed by the stakeholders.  These factors are critical in setting expectations between the Agency and Byrne, identifying and monitoring project risks, and promoting strong project communication.

- **Dedicated Agency Participation** – Agency acknowledges that its staff must be actively involved throughout the entire duration of Services as defined in the agreed upon Project Plan. Byrne will communicate insufficient participation of Agency resources through Project Status Reports with real and potential impacts to the project timeline.  Byrne will work with the project sponsors and department leaders to determine appropriate team member involvement.  This could range from full-time, during early analysis meetings, to part-time during the technical implementation phase.  Please see Appendix A for a full description of participant resources.

- **Accela Implementation Methodology** – It is imperative to project success that the Agency is willing to adhere/adopt to the Accela Implementation Methodology.  Please see Appendix B for a full description of the Accela Methodology.

- **Knowledge Transfer** – It is critical that Agency personnel participate in the analysis, configuration and deployment of Accela Automation in order for Byrne to transfer knowledge to the Agency. Once Post-Production assistance tasks are completed by Byrne Services, the Agency assumes all day-to-day operations of Accela Automation outside of the Support and Maintenance Agreement.

- The Support and Maintenance Agreement does not cover any Agency manipulation of implemented scripts, reports, interfaces and adaptors. Depending on the scope of the project, key knowledge transfer areas could include:

- Configuration
- Scripting
- Event Management Scripts
- Reports and Forms

## HIGH LEVEL SCOPE OF SERVICES

This document is to detail the specific activities, deliverables, roles and responsibilities, and acceptance criteria that comprise the implementation of Accela for the Agency. Byrne will provide professional services for implementation of the above module and will add services per the Work Description section below.

**High Level Milestones and Sample Deliverables**

The scope of services is delivered in six stages and will result in an initial deployment. A high-level description of the phases is listed below. Specific descriptions of all deliverables, responsibilities and acceptance criteria are found in Appendix E. All deliverable templates used are Accela created and follow the Accela methodology. See Assumptions for more information about deliverable templates.

| STAGE DESCRIPTION | MILESTONE OVERVIEW | SAMPLE DELIVERABLES |
|---|---|---|
| Stage 1: Initiation | Set up the project framework for a successful delivery | Project Plan<br>Project Kickoff<br>Core Team Training |
| Stage 2: Analysis | Provide best practice consulting to define to-be configuration for Agency | Gap/Fit Analysis Documentation |
| Stage 3: Solution Foundation | Create the appropriate solution architecture blueprint for a successful deployment | Configuration blueprint |
| Stage 4: Build/Conversion | Build out Accela platform.<br>Create and deliver conversion schemas, interface schemas and other technology solutions needed for implementation | Specifications – Scripts, Interface, Report, Conversions<br>Delivered Components – Scripts, Reports, Interface, Conversion packages. |
| Stage 5: Readiness | Validate Accela solution for Agency deployment via testing | Provide Test Script Templates<br>Support agency with the completion of UAT documents.<br>Assist with investigation and resolution of triaged issues reported by the agency.<br>Training |
| Stage 6: Deploy | Move to Production ("Go Live") and Support | Readiness Checklist<br>Coordinate Move to Production<br>Post Deployment Support |

## PROJECT TIMELINE

The term of this project is estimated to complete in 3 months.

Upon execution of this SOW, the parties will collaborate to determine a start date for Services to be rendered. Upon initiation of these Services, the assigned resources will work with the Agency to collaboratively define a high level, baseline project schedule. Byrne Software will use the baseline project schedule to plan and schedule resource availability in order to complete the defined scope.

Given the fact that project schedules are working documents that change over the course of the project, Byrne Software will work closely with Agency to update, monitor, agree, and communicate any modifications. Changes to the baseline project schedule may result in a change in resource availability.

## PROJECT MANAGEMENT

Byrne will provide a project manager for services throughout the implementation in order to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. To support the implementation of the Accela software at the Agency, Byrne will provide Project Management services throughout the project up to 30 hours. The Byrne Project Manager is responsible for the overall project management and works directly with the client throughout all aspects of Accela implementations: from the initial scoping, planning, staffing to delivery. The Project Manager undertakes the project administration tasks including:

- Project plan management
- Change order management
- Issue log management and escalation
- Status reporting
- Project workspace management
- Resources management
- Work plan management
- Meetings management
- Project review with Project Executive

## PROJECT ASSUMPTIONS

- Agency and Byrne Software will review their responsibilities before work begins to ensure that Services can be satisfactorily completed.
- Changes or additions to scope, requested by the Agency may require a Change Order to reimburse Byrne Software for the additional costs associated with the change.
- If onsite, Agency will provide workspace for the Delivery Team for work completed on Agency premises if onsite work is needed. We anticipate no more than 1 staff member onsite at any given time.
- Agency will maintain primary responsibility for the scheduling of Agency employees and facilities in support of project activities.
- Agency is responsible for proper desktop hardware/software/network preparation in accordance with Accela specifications.
- Agency is responsible to ensure agency participants have adequate hardware/software to successfully participate in online training (i.e., video and audio streaming).
- Agency will commit to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in this SOW. The importance of Agency staff participation is imperative to the successful, and timely, implementation of the project deliverables.

## PROJECT PUT ON HOLD

It is understood that sometimes Agency priorities are revised requiring the Agency to place the Accela implementation on hold. The Agency must send a formal written request sent to Byrne in order to put the project on hold. A project can be on hold for up to 60 days without invoking the termination clause (see Services Agreement). After that time, Byrne can choose to cancel the rest of the Statement of Work. To finish the project will require a new Statement of Work at new pricing.

When a project is put on hold, at minimum, Byrne will need to draft a Change Order to keep some of the Byrne project manager's time engaged to monitor progress and to resource the project once it comes off hold. Other Change Order items may be needed as a result of the delay. When a project goes on hold, project resources will be re-deployed and Byrne will need a forty-five (45) calendar day notice to re-staff the project. Resumption of the project will be dependent upon Byrne resourcing timelines.

Should the Agency become non-responsive to Byrne communications for a term of 30 calendar days regarding continuance of the project work, Byrne can choose to cancel the remainder of the Statement of Work. To finish the project will require a new Statement of Work at new pricing at then current rates.

## GENERAL PROJECT ASSUMPTIONS

### Scope and Timeline
- Scope is based on record types and fees provided by the Agency prior to the SOW development.
- "Go live" (system is in production) timeline assumes timely completion of Agency deliverables (including finalization of requirements / use cases / product catalog), availability of key Agency resources, and collaboration and availability of any third-party vendor resources. Late (per mutually agreed project plan) Agency deliverables may adversely impact overall implementation timeline.
- Overall project plan will be mutually agreed to by Agency and Byrne project managers prior to final Configuration.
- Byrne will provide the Agency with a Weekly Status Report that outlines the tasks completed during the prior week, the upcoming tasks that need to be completed during the following week, the resources needed to complete the tasks, a current version of the project plan, and a listing of any issues that may be placing the project at risk (e.g., issues that may delay the project or jeopardize one or more of the production dates).
- The project schedule is managed using Microsoft Project. Should any tasks slip behind schedule ten (10) business days, Byrne and Agency will escalate according to the Communication Plan in the Project Charter.
- Deliverables will be documented in Accela based templates using the Accela methodology. Sample templates are available to Agency upon request.
- Agency is responsible for hosting any interfaces outlined in this SOW.


### Training
- The Agency project team will provide the necessary staff resources to complete training needs analysis and assist with training planning.
- The Agency is solely responsible for making designated trainees (trainers, agents, administrators) available for training per the project schedule. If any designated trainee is not available to participate in scheduled training, Byrne is not responsible for making alternative arrangements for missed training.
- The Agency will be responsible for additional end user training including training logistics, training scheduling, and the printing of training materials. The Agency will confirm the total number of training rooms needed for the project duration after Agency approval of the draft training strategy.
- Agency users will have basic computer skills. Byrne is not responsible for an individual's response to the training or their capacity to learn or be trained. Specific prerequisite skills include:
    - End users – proficient in Windows environment and Internet environment, as well as working knowledge of Agency business processes and functions.
    - Technical staff – in addition to the above skills, technical users should have knowledge of:
        - Moderate to advanced technical knowledge of database design, database usage, syntax management, and java scripting.
        - Familiarity with existing system source data
        - Familiarity with existing system design and structure

### Testing
- Byrne is responsible for testing the initial configuration of system
- Agency is responsible for writing any User Acceptance Test Scripts. Testing Scripts encompass the daily work practices of the business. An example of a test script would be accepting an application through approving the application, taking fees and printing any reports, outlining the process start to finish. Agency is responsible for User Acceptance Test and System Integration Testing

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

### Project Completion
- The project is complete once the transition to Accela's Customer Support has been completed. If applicable, the specific deliverable acceptance process and financial obligation for "transition to Accela's Customer Support" or "project completion" will commence on the date the transition to Accela's Customer Support.

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

## PROJECT RESOURCING ASSUMPTIONS

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

**Byrne Resourcing**

- Byrne personnel will attend Agency executive steering committee meetings as needed.
- In the pricing, Byrne has assumed the appropriate resourcing to ensure deployment success for the scope outlined.
- Byrne will provide a project manager for services throughout the implementation to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. To support the implementation of the Accela Automation software at the Agency, Byrne will provide Project Management services throughout the project.
- Any additional worked hours over the hours or scope stated in the SOW will require a Change Order.

**Third Party Resourcing**

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

## ACCELA SOLUTION ASSUMPTIONS

### General

- Agency shall provide the necessary tools, accounts, and permissions that will enable Byrne to access the Agency's internal network for the purpose of remote installation and testing. This access must be provided through industry standard tools such as Virtual Private Network (VPN). Failure to provide this access in a timely fashion will result in a project delay. Such a delay will result in a Change Order pursuant to the PAQ process.
- Byrne will implement the most current version of Accela Civic Platform at the time of go live.
- For use with Accela Citizen Access, Agency will provide/purchase/acquire an online merchant account and all related hardware required by the merchant account provider for the handling of credit cards and/or checks.
- Agency is responsible for proper site preparation, hardware, software, and network configuration in accordance with Accela specifications.
- Byrne will be responsible for implementing a functioning version of the application software at the Agency (assuming the Agency has installed the proper hardware, software, and networking devices).
- Agency will ensure that Byrne resources have access to a Dev or Test version of the 3rd-party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3rd-party system.
- Agency will provide Byrne with access to test and development environments for each Agency system that requires integration with Accela Automation.
- Assumes a standard package solution, out of the box, implementation.

### Data Conversion

No data conversion will be included in this statement of work.

## ADMINISTRATION

## LOCATION OF SERVICES AND KEY CONTACT

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

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

| Work Location: | |
|---|---|
| | |

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

| Name: | TBD |
|---|---|
| Title: | TBD |
| Phone Number(s): | TBD |
| Email: | TBD |

## CHANGE ORDERS

In order to make a change to the scope of Professional Services in this SOW, Agency must submit a written request to Byrne specifying the proposed changes in detail. Byrne shall submit to Agency an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Professional Services ("Change Order"). Byrne shall continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees, therefore. Any Change Order shall be agreed to by the parties in writing prior to implementation of the Change Order. If Byrne's effort changes due to changes in timing, roles, responsibilities, assumptions, scope, etc. or if additional support hours are required, a change order will be created that details these changes, and impact to project and cost (if any). Any change order shall be signed by Byrne and Agency prior to commencing any activities defined in the change order. Standard blended rate for Byrne resources is $145.00 per hour. The Change Order Template is attached hereto as Appendix D.

## EXPIRATION

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

## SIGNATURE AND ACCEPTANCE

### Byrne Software Technologies, Inc.

By: _____

Print
Name: _____

Title: _____

Date: _____

### City of Fresno, California

By: _____

Print
Name: _____

Title: _____

Date: _____

# APPENDIX A: PROJECT RESOURCES

## AGENCY RESOURCES

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

| Agency Resources | Description | Hours per week Implementation Estimate | Hours per week Support Estimate |
|---|---|---|---|
| **Project Sponsor** | Responsibilities include:<br><br>• Ultimate responsibility for the success of the project,<br>• Creating an environment that promotes project buy-in,<br>• Driving the project through all levels of the agency,<br>• High-level oversight throughout the duration of the project,<br>• Serving as the primary escalation point to address project issues in a timely manner. | 2 Hours*<br><br>(*Might be higher during initiation) | 2 Hours |
| **Project Manager** | Responsibilities include:<br><br>• Overall administration, coordination, communication, and decision- making associated with the implementation.<br>• Planning, scheduling, coordinating and tracking the implementation with Byrne and across departments within the agency.<br>• Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track. | 40 Hours | 10 Hours |

| | | | |
|---|---|---|---|
| **Division/Departmental Business Leads** | A user representative for each affected department must be appointed to facilitate analysis and configuration and serve as a decision-making entity for that group. These critical appointments may well determine the success of the implementation for their respective areas. Responsibilities include:<br><br>• Attending requirements workshop sessions.<br>• Willing and able to gather data and make decisions about business processes.<br>• Assist in the creation of specifications for reports, interfaces & conversions<br>• Review and test the system configuration.<br>• Participating in the implementation of the Accela Automation solution. | 1 (minimum) superuser/liaison FTE per department. 50-75% dedication of a 2-3 resources per department for 4-6 weeks. End-user training period is 2-3 FTEs for 4 weeks at about 50% dedication and User Acceptance Testing and Go-Live activities will require 2-3 FTEs at 80% dedication. | 2 Hours |
| **Division/Departmental Subject Matter Expert (SME)** | Responsibilities include:<br><br>• Being trained on the Accela Automation system at a System Administration level;<br>• Being fully engaged in the Business Analysis and system configuration activities;<br>• Assist internal efforts towards the creation of reports, interfaces & conversions;<br>• Assist in the review and testing of the system configuration;<br>• Actively participate in the full implementation of the Accela Automation solution. | 2 Individuals, 30 Hours | 40 Hours |
| **Technical Lead** | Responsibilities include:<br><br>• Primary responsibility for the technical environment during the software implementation;<br>• Ensure that servers, databases, network, desktops, printers, are available for system | 40 Hours | 5 Hours |

| | | | |
|---|---|---|---|
| | implementation and meet minimum standards;<br><br>• Work with Byrne technical personnel during implementation;<br>• Maintain test and production databases;<br>• Perform day-to-day maintenance of the system and install maintenance releases;<br>• Act as the primary technical resource for troubleshooting problems;<br>• ·Establish and maintain backup, archival, and other customary maintenance and housekeeping activities. | | |
| **Report Developer** | Responsibilities include:<br><br>• Understanding reporting needs of Agency<br>• Ability to write or amend reports as the Agency's report needs grow | 40 Hours during reporting phase of project | 20-40 Hours |

## BYRNE RESOURCES

Byrne will assign key Professional Services resources for this engagement with Agency. These individuals are well versed in the Accela Civic Platform application and are professionally qualified to lead this effort. Byrne's Project Manager shall assume full responsibility for the coordination of this team and its interaction with key Agency resources assigned to the effort. The main roles are as follows:

| Byrne Resources | Description |
| --- | --- |
| **Project Executive** | The Project Executive oversees the project's progress/direction and works with the Project Manager to ensure efficiency, consistency and quality in delivery of Accela implementations. The Project Executive actively participates in a project director/executive role. The Project Executive will meet with Agency Executives monthly or upon request throughout the duration of the project. |
| **Project Manager** | The Byrne Project Manager is responsible for the overall project management and works directly with the client throughout all aspects of Accela implementations: from the initial scoping, planning, staffing to delivery. The Project Manager undertakes the project administration tasks including:<br><br>• Project plan management,<br>• Change order management,<br>• Issue log management and escalation,<br>• Status reporting,<br>• Project workspace management,<br>• Resources management,<br>• Work plan management,<br>• Meetings management,<br>• Project review with Project Executive.<br><br>In addition, the Project Manager will actively participate in leading the System Configuration Analysis sessions and will be responsible for the creation of the System Configuration Document. |
| **Senior Implementation Consultant** | The Senior Implementation Consultant assigned to the project will have major experience in the business process as well as the product functionality and is responsible for:<br><br>• Business analysis activities: Mapping the client's business processes and requirements to the functionality of Accela's products and the creation of solution design,<br>• Leading system configuration activities,<br>• Providing training/mentoring to agency staff,<br>• Recommend industry best practices to agency to enhance business processes,<br>• Guide agency on how best to configure the system based on past experiences and software expertise. |
| **Implementation Consultant** | Implementation Consultant resources support the project and typically focus on the CAowing tasks. |

| | |
|---|---|
| | - The configuration of the system to match the System Configuration document.<br>- Build activities within the project, such as conversion data mapping, creation of reports and interface specification. |
| **Technical Consultant** | Byrne Technical Consultants are involved in all areas that require knowledge of server-side considerations and Accela add-on products such as:<br><br>- Application installation and setup (Accela Automation, Accela GIS, Accela Wireless, and Accela Citizen Access),<br>- Report definition and creation,<br>- Event Manager Script definition and programming,<br>- Database Conversions and data mapping assistance,<br>- Interface specifications and development. |
| **Training Consultant** | Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project. |

## APPENDIX B – ACCELA IMPLEMENTATION METHODOLOGY

Byrne will deliver its Services to the Agency by employing the methodology detailed in this section.  This is a proven methodology that guides the project from inception to deployment, thereby increasing the chances of successfully implementing Accela software products.  Project delivery through execution of this Implementation Life Cycle is described below.

### IMPLEMENTATION LIFE CYCLE

Thorough execution of these six stages ensures that Accela customers receive high-quality services throughout the project engagement.

Figure 1 - Accela Methodology
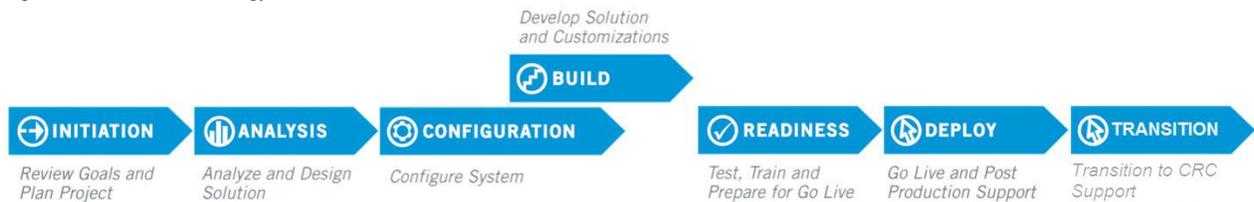


As illustrated in the figure above, the stages of project delivery CAow in linear direction, although many tasks run in parallel as appropriate to avoid unnecessary project delays.  Each stage has pre-defined objectives, tasks and associated deliverables.  Depending on the exact scope of the project, a full complement or subset of all available deliverables will be delivered through the services defined for the project.  Employing this deliverables-based approach ensures that Byrne and the Agency understand the composition and 'downstream' impact of each project deliverable to ensure the project is delivered with quality and in a timely manner.

#### INITIATION
Initiation represents the first stage in the lifecycle.  During this stage, project contracts and the SOW are finalized, project scope and objectives are reviewed, and project planning activities and deliverables are completed.

#### ANALYSIS
Analysis is the second stage in the lifecycle.  During the Analysis stage, Byrne reviews existing agency documentation, interviews agency staff, and conducts workshops to understand the "To-Be" vision of the Agency that can be executed with the aid of Accela Automation.  It is during this Phase that Byrne gains a deeper understanding of Agency processes and business rules; simultaneously, the Agency begins to gain a deeper understanding of the methodology and Accela Automation capabilities.  A key output of this Phase is the To-Be Analysis Document(s) which serve as the 'foundation' for configuration of Accela Automation to support germane elements of the Agency "To-Be" vision.  Supplementing the To-Be Analysis Document(s) are all other configuration specifications documents related to data conversion, interfaces, reports, and event scripts.

#### SOLUTION FOUNDATION
Solution Foundation is the third stage in the lifecycle.  It begins upon completion of Stage 2 and should be completed prior to the next stage, Build.  During the Solution Foundation stage, Accela Automation will be built to match the to-be processes agreed to in the Analysis stage.  Essential to this effort is the configuration of the Record (Case, Application, Permit, Work Order, etc.) types that were agreed to during the Analysis phase.

#### BUILD

Build serves as the fourth stage in the lifecycle, and execution of this stage overlaps Configuration, but ends after Configuration is complete. During the Build stage, all defined elements during the Analysis stage beyond the Solution Foundation will be implemented. This includes conversions, event scripts, interfaces and reports.

**READINESS**

Readiness is the fifth stage in the lifecycle. During the Readiness stage Accela Automation is fully tested, errors are identified, documented and corrected. Additionally, the solution is prepared for deployment. In addition, system administrators and end users are trained so that all appropriate agency staff members are prepared to use and maintain the software once the move to production occurs.

**DEPLOY**

Deploy is the sixth and final stage in the lifecycle. During the Deploy stage the applications are moved to production; all requisite pre-production activities are identified, tracked and completed, and post-production analysis and review is completed. Upon moving to production, the Accela Automation applications are transitioned to the Accela Customer Resource Center ('CRC') for ongoing support. A formal transition will occur between the Services team and the CRC that instructs the agency on available communication channels (telephone, email, and online tracking system) and use of the Accela knowledge base. Lastly, all documented issues or enhancement requests will be transitioned from the Services team to the Customer Resource Center.

## APPENDIX C – DELIVERABLE ACCEPTANCE FORM

| Please acknowledge acceptance by: | | | |
|---|---|---|---|
| **A** | Sign and fax this document to:<br><br>Byrne Software Technologies, Inc.<br>YOUR NAME<br>YOUR TITLE<br>**Tel:** | OR **B** | Email this document as an attachment to:<br><br>**YOUR EMAIL** |

| | |
|---|---|
| Date: | |
| Agency Name: | |
| Approving Agency Manager: | |
| Byrne Manager: | |
| Project Name / Code: | |
| Contract / Agreement #: | |

*Agency agrees that Byrne has successfully completed the following Deliverables:*

| Deliverable # | Source / Reference Details | |
|---|---|---|
| | Service Agreement | |

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

APPROVALS:

_____
Agency Name

_____
Signature

_____
Title

_____
Date

## APPENDIX D – CHANGE ORDER
## SAMPLE CHANGE ORDER – PAGE 1

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

---

PROJECT CHANGE DESCRIPTION/TASK SUMMARY:
1. Log File
   - **Issue details / scope impact:**
   - **Schedule impact**:
   - **Resource impact**:
   - **Cost impact**:

Total Project Schedule Impact:
Total Project Resource Impact:
Total Project Cost Impact:

---

DISPOSITION COMMENTS:


Disposition:   ☐ Approved   ☐ Rejected   ☐ Closed   ☐ See Comments
Date:

| Accepted By:<br>**Agency** | Accepted By:<br>**Byrne Software Technologies, Inc.** |
|---|---|
| By: | By: |
| Print Name: | Print Name: |
| Title: | Title: |
| Date: | Date: |

## APPENDIX E – DETAILED SCOPE
## WORK DESCRIPTION

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

## STAGE 1 – INITIATION

## DELIVERABLE 1: PROJECT INITIATION

Project initiation is an opportunity to ensure the project starts in a well-organized, structured fashion while re-confirming the Agency and Byrne expectations regarding the implementation.  This Deliverable is comprised of project planning activities, core project management documents and templates and the first meeting conducted between the Agency and Byrne after the signing of the Statement of Work.

In conjunction with the Agency representatives, Byrne will perform the following tasks:
1. Finalize staffing for the project teams.
2. Conduct a formal Kickoff meeting.  The objective of this meeting is to review the purpose of the project and discuss the project scope, roles and responsibilities, deliverables, and timeline.
3. Provide Accela standard Project Status Report Template format.
4. Finalize and document formal deliverable signoff procedures, identify team members that will be responsible for signoff from the Agency and Byrne.
5. Finalize an integrated baseline project plan that includes resource allocation for all tasks (in cooperation with the Agency Project Manager).

The Project Kickoff Meeting includes a formal presentation by the project team to review project objectives, methodology, timeline, roles and responsibilities, risks, and other key project elements with project stakeholders.

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

- Baseline Project Plan
- Project Status Report Template
- Project Kickoff Presentation
- Setup of Cannabis Module
- Setup of Cannabis Licensing
- Up to 20 hours

Byrne Responsibilities:
- Provide timely and appropriate responses to Agency's request for information.
- Coordinate project planning activities.
- Communicate the Accela Implementation Methodology that will be used by Byrne to deliver Services.
- Complete Baseline Project Plan, Project Status Report Template, and Project Kickoff Presentation deliverables with input from appropriate Agency resources.
- Work with the Fresno IT staff and Accela Support and Sales staff to setup the software licensing in the existing Test, Development and Production environments.

Agency Responsibilities:
➢ Identify and set expectations with key resources and subject matter experts for ongoing participation in the project.

➢ Provide timely and appropriate responses to Byrne's requests for project planning input and meeting logistics requests.
➢ Provide meeting facilities for Project Kickoff and other onsite activities.
➢ Include Project Sponsor in Project Kickoff Meeting.
➢ Provide suitable Agency facilities to accommodate training.
➢ Ensure that users are proficient in using PCs in a Windows environment as a prerequisite for the training.
➢ Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the training.

Acceptance Criteria:
➢ Review and acceptance of the Project Status Report Template
➢ Review and acceptance of the Baseline Project Plan
➢ Completion of the Project Kickoff Meeting
➢ Demonstrate Access to Cannabis module in the Test and Development Environments

## STAGE 2 – BEST PRACTICE ANALYSIS

Best Practice Analysis is comprised of the activities required to define the Accela Automation Solution Foundation for the Agency.

## DELIVERABLE 2: RECORD TYPE GAP ANALYSIS SESSIONS (UP TO 40 HOURS)

Byrne will work closely with designated Agency personnel and will conduct analysis sessions to capture and align Accela Civic Apps with Agency business processes. A part of the process mapping is to group "like" processes together to assist in streamlining the analysis and minimize redundancy.  Byrne will allocate 40 hours to this effort, additional efforts required outside this scope can be addressed via the Change Order process.

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

- Best Practice Business Process Gap Analysis document.
- Byrne has allotted up to 40 hours to this effort

Byrne Responsibilities:
- Provide timely and appropriate responses to the Agency's request for information.
- Conduct meetings via email, web conference, phone, and in person to gather and validate analysis.
- Create Gap Analysis documents for each record type for Agency approval.

Agency Responsibilities:
- Provide timely and appropriate responses to Byrne's requests for information.
- Make available the appropriate Agency key staff.
- Provide any existing fee schedules and other pertinent document samples.
- Schedule participants and meeting locations for analysis activities.

Acceptance Criteria:
- Completion of To Be Gap Analysis documents for Best Practice Record Types to be configured.

## STAGE 3 – SOLUTION FOUNDATION

## DELIVERABLE 4:  RECORD TYPE CONFIGURATION (UP TO 60 HOURS)

Byrne resources will update the Accela Civic Apps based on the gap analysis documents produced during analysis sessions and approved by the Agency. Byrne has allotted up to 60 hours to this effort, additional efforts required outside this scope can be addressed via the Change Order process.

The following list provides examples of the types of updates that may be required;
- Add or rename existing fields in order to account for Agency business processes and/or data conversion mapping.
- Define and create user accounts with associated user groups/security access.
- Updates to existing workflows as needed
- Updates to existing system dropdown fields
- Updates and creation of Agency specific fee schedules
- Updates and creation of Agency specific inspection types and guide sheets/checklists
- Other areas as defined

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

- Byrne has allotted up to 60 Hours to this effort.

Byrne Responsibilities:
- Provide timely and appropriate responses to Agency's request for information.
- Interview staff in order to understand existing business processes.
- Conduct requested sessions to capture the required business processes to be automated within the system.
- Conduct meetings via email, web conference, phone, and in person to complete required consulting.

Agency Responsibilities:
- ➢ Provide timely and appropriate responses to Byrne's requests for information.
- ➢ Make available the appropriate Agency key users and content experts to provide required information, participate in the configuration analysis and verify the accuracy of the documented workCAows, input/output formats, and data elements.
- ➢ Provide any existing business process documentation, including process CAows; fee schedules; commonly used applications, reports and forms; and other relevant information
- ➢ Schedule participants and meeting locations for analysis activities.

Acceptance Criteria:
- ➢ Demonstrate record configuration of Record Type, Fees, Workflow, Intake forms and any other base components that are configured in accordance with the specification documents.

## DELIVERABLE 4: ACCELA CITIZEN ACCESS (ACA) CONFIGURATION

This deliverable includes setup and configuration of the Agency municipal website branding and up to **30** hours for configuration to the citizen portal pages to make the pages more in line with the Agency processes per the standard package solutions.  Distinct updates to the citizen portal pages include, adding a page flow component, like attachments to an existing defined page flow setup, updating the section instructional text with agency language, including descriptive help instructions for specific agency defined data fields, or updating the online disclaimer text. Each update to the citizen portals and sections are considered a single action change.

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

Byrne Software Responsibilities:
- Provide timely and appropriate responses to Agency's request for information.
- Setup Citizen Access branding by loading one banner file provided by the Agency
- Configure the citizen portal pages, based on Agency feedback, not to exceed 90 hours for this effort
- Verify the loaded citizen access branding, citizen portal pages and sections updated and payment acceptance in environment, based on Agency feedback.

Agency Responsibilities:
- Provide timely and appropriate responses to Byrne Software's requests for information.
- Provide website branding files, which include the top and side banner
- Arrange for the availability of appropriate Agency staff to review the branding on Citizen Access
- Agency staff must provide web branding
- Agency staff must review and test all Citizen Access configuration and provide feedback to Byrne Software based on the agreed upon project plan timeline
  - *Any additional changes identified during review and testing beyond the scope identified above may be subject to a Change Order request*
- Schedule appropriate Agency staff participants and meeting locations for activities.

Acceptance Criteria:
- Verify the operational Citizen Access functionality such as login/logout, the updated citizen portal pages and sections, and payment acceptance

## DELIVERABLE 5: ACCELA MOBILE APPS CONFIGURATION

Byrne will configure the Accela Mobile Gateway (up to 8 hours) for the Agency to utilize the standard Accela Mobile App and ensure the Cannabis module is added to the app. Byrne will train Agency staff on the features of the Gateway and Agency Admin Portal.

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

      a) Accela Mobile App Sign On
      b) Demonstration of Cannabis module activities in the Mobile App

Byrne Responsibilities:
- Set up Accela Mobile Gateway
- Configure Accela Mobile Gateway to work with Accela standard mobile devices

Acceptance Criteria:
- Login in to the Accela Mobile App under the Agency name and view Cannabis data

Acceptance Review Period:
Ten (10) business days total

## STAGE 4 – BUILD

The Build stage includes data conversions, development of interfaces, development of all Business Process Validation and Automation (Event Manager Scripts and Expressions) configuration of add-on products and custom report development. It comprises all of the additional activities outside of solution foundation that are required to

complete the total solution for the Agency. Similar to the Configuration Stage, it is critical that appropriate agency representatives are involved in each step of the process to ensure success.

## DELIVERABLE 6: AUTOMATION AND BUSINESS RULES SCRIPTING
(SCRIPTING UP TO 120 HOURS)

During the configuration analysis phase of the implementation project, Byrne will identify opportunities to supplement the Accela Automation base functionality via Event Manager Script Engine (EMSE) scripts and Expression Builder in order to validate and automate business processes. Byrne will work with Agency to identify desired functionality, and subsequently will assist with prioritizing the needs in order to determine that will be developed by Byrne within the scope of this implementation. The Business Process Validation and Automation developed by Accela can be used as models whereby agency staff can develop and modify additional functionality as needed.

Business Process Validation and Automation is broken out into two functional areas of the Accela solution, as defined below:

- **EMSE (Event Manager Scripting Engine)** – used to script based on system activities, such as a before or after event, which allow the system to automate activities (**example:** do not allow an inspection to be scheduled prior to a specific workCAow task, or auto-calculate and invoice a fee upon application submittal)
- **Expression Builder** – used to script form-based interactions that occur prior to triggering and event or master script activity (**example:** auto-population form-based data fields based on user-selected values)

Prior to the development, the Agency will approve a design specification document that will be created jointly by the Agency and Byrne. The approved document will be used as a basis for determining completion and approval of the deliverable.

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

- Prioritized list of requirements that require Automation
- Specification documents for each required Automation
- Demonstration of completed Automations in development or test environments per the specifications document(s)
- Byrne has allotted up to 120 hours for this effort

Byrne Responsibilities:
- Work with Agency staff to identify potential uses of scripting
- Assist with development of list of desired functionality
- Aid the Agency in prioritizing which scripts will be developed by Byrne
- Develop scripts based on the specifications
- Demonstrate functionality of scripts per specifications

Agency Responsibilities:
- Allocate the time for qualified business and technical experts for the script requirements sessions that are critical to the project success
- Identify resources that will learn scripting tools and approaches for ongoing maintenance
- Prioritize desired functionality to determine which scripts Byrne will develop
- Provide timely and appropriate responses to Byrne's request for information
- Verify the Script Specification meets the intended business requirement
- Allocate the time for qualified personnel to test the script for acceptance

Acceptance Criteria:

- Review and acceptance of design document with written sign-off from the Agency
- Demonstration of all developed script within the system to the Agency

## DELIVERABLE 7: REPORT DEVELOPMENT (UP TO 100 HOURS)

Byrne will work with the agency to determine requirements, create specification documents, and develop reports as needed to support the business process. Reports include tabular reports, letters, permits and any other printable output from the system. The reporting tool will be limited to the tools currently supported by the Accela SaaS model and the tool used will be identified in the specification. Reports will only be developed once specification documents are approved by the agency. Byrne has allotted up to 100 hours to this effort. Additional efforts required outside this scope can be addressed via the Change Order process.

In terms of specific output, the following will be executed for this deliverable:
- Report requirement analysis sessions
- Create report specifications
- Develop reports using the available tools on the Accela SaaS platform
- Demonstration of the completed report in the development environment

- Byrne has allotted up to 100 Hours to this effort.

Byrne Responsibilities:
- Work with Agency staff to identify reporting needs
- Create specifications for each report
- Develop the report to run from the Accela back office or ACA

Agency Responsibilities:
- Allocate the time for qualified business and technical experts for the report requirements sessions that are critical to the project success
- Review all specification documents within 5 business days

Acceptance Criteria:
- ➢ Review report in Accela with sign-off from the Agency
  .

## DELIVERABLE 8: ESRI INTEGRATION

Byrne will work with key staff from both the Cannabis department and GIS administrators to leverage the current GIS/ESRI maps to extend the functionality of Accela and export key permit and licenses data back to the GIS databases.

In terms of specific output, the following will be executed for these deliverables:

- ➢ Specifications Document
- ➢ Provide Dynamic Themes scripting within Accela
- ➢ Provide Proximity Alerts using GIS data points
- ➢ Create export files to transmit data back to GIS for display in maps and layers

Byrne Responsibilities:
- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions.
- Work with Agency staff to develop interface specifications document.

- Use an Accela web service or other tool to implement the interface functionality based on the specifications.
- Build all aspects of the interface that interact directly with the Accela Automation.

Agency Responsibilities:
- Provide timely and appropriate responses to Byrne's request for information.
- Provide system and access to individuals to provide required details of system interface.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specification development and data mapping process.
- Review and approve the interface specification documents.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Work with 3rd party to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3rd party system or Agency business processes.

Acceptance Criteria:
- Review and approve the Interface Specifications document.
- Demonstration and approval of the completed interface as per the requirements detailed in the interface specifications document in the Test or Dev environment.

Acceptance Review Period:
- Ten (10) business days total

## DELIVERABLE 9: PEOPLESOFT FINANCIALS INTEGRATION

Byrne will leverage the existing PeopleSoft integration to provide export files specifically for the Cannabis module payment activities. Byrne has allotted up to 40 hours for specifications, configurations, testing and deployment.

In terms of specific output, the following will be executed for these deliverables:

- ➢ Specifications Document
- ➢ Update the existing PeopleSoft interface to include Cannabis
- ➢ Create export files to transmit data back to the PeopleSoft middleware solution currently in place

Byrne Responsibilities:
- Provide timely and appropriate responses to Agency's request for information.
- Conduct Interface Analysis sessions.
- Work with Agency staff to develop interface specifications document.
- Use an Accela web service or other tool to implement the interface functionality based on the specifications.
- Build all aspects of the interface that interact directly with the Accela Automation.

Agency Responsibilities:
- Provide timely and appropriate responses to Byrne's request for information.
- Provide system and access to individuals to provide required details of system interface.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).

- Assist in the interface specification development and data mapping process.
- Review and approve the interface specification documents.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Work with 3rd party to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3rd party system or Agency business processes.

Acceptance Criteria:
- Review and approve the Interface Specifications document.
- Demonstration and approval of the completed interface as per the requirements detailed in the interface specifications document in the Test or Dev environment.

Acceptance Review Period:
- Ten (10) business days total

# STAGE 5 – READINESS

# DELIVERABLE 10: TRAINING

Byrne will provide training for Agency staff that focuses on the administration, maintenance, and augmentation of its Accela Automation configuration. Our aim at Byrne is to educate Agency resources on all aspects of Accela Automation in an effort to ensure the Agency is self-sufficient. This allows the Agency to best react to changing requirements and ongoing maintenance, which can allow the Agency to be reactive and significantly reduce system maintenance costs over time.

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

- Accela Core Team Training (1 day) remote training
- Accela Automation Admin Usage (1 day) remote training
- Accela Automation End User (Includes ACA Usage) (1.5 days), remote, up to 20 students
- Accela Ad-hoc Report training (0.5 day), remote training
- Byrne has allotted up to 80 hours for this effort

Byrne Responsibilities:
- Coordinate with the Agency to define training schedule and logistics.
- Deliver training per the specific requirements listed above.

Agency Responsibilities:
- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- Provide suitable Agency facilities to accommodate various training classes.
- Ensure that users are proficient in using PCs in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

Acceptance Criteria:
- Execution of listed training courses.

# DELIVERABLE 11: USER ACCEPTANCE TESTING (UAT)

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

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

Byrne will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and a defined testing process.  Byrne will address and rectify issues discovered during the UAT process as Agency staff executes testing activities.  Byrne will work with the Agency to develop a test plan, as well as an issue log to track the progress of testing.  It should be noted that Byrne will plan for a total of 1 week to complete this deliverable.

Byrne will work diligently with Agency to ensure adequate time and staffing to UAT in order to completely test the solution and provide several opportunities for the Agency to add additional staff and time to this effort before recommending a postponement or delay.

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

- Resolution of issues resulting from Agency User Acceptance Testing
- Fully tested system that is ready to move to production for go-live
- Byrne has allotted up to 60 hours for this effort

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

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

Acceptance Criteria:
- Completion of up to 40 hours of UAT

## STAGE 6 – DEPLOY

## DELIVERABLE 12: PRODUCTION STAND-UP SUPPORT

This deliverable is comprised of the post- Production support assistance that Byrne will provide to address issues and provide consultative advice immediately following the move to Production for daily use. Byrne will provide support immediately following deployment (go-live).

Byrne will work with the Agency to identify and address issues identified during this period using a Postproduction Issues List. This list will be comprised of issues related to the defined deliverables listed in this SOW, which will be addressed by Byrne, as well as any other issues that the Agency wishes to track (outside of scope, phase 2, etc.). Examples of issues the Agency is responsible for include training issues, functional changes beyond the scope of this Statement of Work, cosmetic changes, and procedures related to the use of Accela Automation. Specifically, Byrne will not be developing or creating additional reports, conversions, interfaces, record types and workflow processes that were not included in the scope of this project during post deployment support.

At the end of the support period, Byrne will provide a final copy of the issue tracker to the customer and disable the list. Additionally, a formal meeting will be scheduled with the Agency, Byrne Services Team, and Accela Support for the purpose of transitioning support of future issues and question from the Agency to Accela Support.

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

- Move all configurations, scripting and reports to the Production environment
- Remote support as needed, for a duration of 2 weeks, up to 40 hours post Go Live.
- Transition of Agency from Services team to Accela Support for ongoing support

Byrne Responsibilities:
- Provide post-production support for Accela developed configuration and components
- Assist with the identification of issues for the Postproduction Issues List
- Assist with issues that may arise related to the deliverables in this SOW
- Transfer ongoing support of the client and to the Accela Support to address any postproduction issues that require remediation

Agency Responsibilities:
- Provide technical and functional user support for post-production support and monitoring
- Develop and maintain a Postproduction Issues List
- Provide timely and appropriate responses to Accela's request for information
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency

Acceptance Criteria:
- Demonstrate all approved configurations, scripting and reports are working in the Production environment
- Execution of up to 40 hours of Go Live, post-Production support for transition to Accela Support, during a 2-week duration
- Official transfer from the Byrne Services project team to Accela Support.

**END OF DOCUMENT**