

GOVERNMENT - PRICE QUOTATION



ACCELA GOVERNMENT AT CARAHSOFT

1860 MICHAEL FARADAY DRIVE | SUITE 100 | RESTON, VIRGINIA 20190
 PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
 WWW.CARAHSOFT.COM

TO: Doug Woodall
 Acting Dir, Road & Bridge
 Williamson County
 Georgetown, TX 78626

FROM: Alex Stanton
 Carahsoft Technology Corp.
 1860 Michael Faraday Drive
 Reston, Virginia 20190

EMAIL: Doug.woodall@wilco.org

EMAIL: Alex.Stanton@carahsoft.com

PHONE: (512) 943-3336 **FAX:**

PHONE: (703) 871-8522 **FAX:** (703) 871-8505

TERMS: DIR Contract No. DIR-TSO-3149
 Expiration Date: June 22, 2018
 FTIN: 52-2189693
 Shipping Point: FOB Destination
 Credit Cards: VISA/MasterCard/AMEX
 Remit To: Same as Above
 Payment Terms: Net 30 (On Approved Credit)
 Texas VID#: 1522189693700
 Sales Tax May Apply

QUOTE NO: 9738769
QUOTE DATE: 07/19/2017
QUOTE EXPIRES: 10/31/2017
RFQ NO:
SHIPPING: ESD
TOTAL PRICE: \$420,203.21

TOTAL QUOTE: \$420,203.21

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE
COMBINED QUOTE- OSSF & WCCHD						
1	SS10APFMSLVR001	Accela Civic Platform Silver - Subscription User Accela Inc		\$2,575.44 TX DIR	37	\$95,291.28
2	SS10ACAPOP0001	Accela Citizen Access - Subscription population Accela Inc		\$0.0294 TX DIR	508514	\$14,950.31
COMBINED QUOTE- OSSF & WCCHD SUBTOTAL:						\$110,241.59
COMBINED QUOTE- OSSF & WCCHD- YEAR 2 PRICING						
3	SS10APFMSLVR001- R1	Accela Civic Platform Silver - Subscription User Renewal - 12 Months (1st Renewal Term) Accela Inc		\$2,652.70 TX DIR	37	\$98,149.90
4	SS10ACAPOP0001- R1	Accela Citizen Access - Subscription population Renewal - 12 Months (1st Renewal Term) Accela Inc		\$0.0300 TX DIR	508514	\$15,255.42
COMBINED QUOTE- OSSF & WCCHD- YEAR 2 PRICING SUBTOTAL:						\$113,405.32
COMBINED QUOTE- OSSF & WCCHD- YEAR 3 PRICING						
5	SS10APFMSLVR001- R2	Accela Civic Platform Silver - Subscription User Renewal - 12 Months (2nd Renewal Term) Accela Inc		\$2,732.28 TX DIR	37	\$101,094.36
6	SS10ACAPOP0001- R2	Accela Citizen Access - Subscription population Renewal - 12 Months (2nd Renewal Term) Accela Inc		\$0.0300 TX DIR	508514	\$15,255.42

1860 MICHAEL FARADAY DRIVE | SUITE 100 | RESTON, VIRGINIA 20190
PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
WWW.CARAHSOFT.COM

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE
COMBINED QUOTE- OSSF & WCCHD- YEAR 3 PRICING SUBTOTAL:						\$116,349.78
COMBINED QUOTE- OSSF & WCCHD						
7	FNG-PS-PHSE1	FutureNet Group Professional Services Hours- Phase An Estimated 449 Hours Carahsoft Technology Corporation - FNG-PS- PHSE1		\$73,206.52 TX DIR	1	\$73,206.52
8	T&E	Travel and Expenses FutureNet Group Travel not to Exceed amount Carahsoft Technology Corporation		\$7,000.00 OM	1	\$7,000.00
COMBINED QUOTE- OSSF & WCCHD SUBTOTAL:						\$190,448.11
SUBTOTAL:						\$420,203.21
TOTAL PRICE:						\$420,203.21
TOTAL QUOTE:						\$420,203.21

Purchase order must reference the Carahsoft Texas DIR Contract Number
Purchase order must reference the attached Accela Terms & Conditions
Subscription Fees will be billed and due upon signing
Start Date: Start upon delivery
End Date: One year after delivery

Accela End User Subscription Terms and Conditions (Accela Civic Platform, Accela Citizen Access Subscription)

As used herein, "Accela" refers to Accela, Inc., the owner of the Subscriptions Services. "Customer" or "End User" refers to the entity that executes a sales order with Reseller, Carahsoft Technology Group, for Accela Subscription Services. By installing or using the licensed software from Accela, Inc., the End User ("Customer") is agreeing to be bound by the Accela End User Subscription Terms and Conditions. The Accela software products ("Software") are protected under the laws of the United States and the individual states and by international treaty provisions. Accela retains full ownership in the Software and grants to Customer a limited, nonexclusive, nontransferable license to use the Software, up to the limitations determined by the license purchased, subject to the following terms and conditions:

1. Customer's subscription term commences on the date Accela provides appropriate access credentials to Customer's designated technical contact, indicating that the application services identified in the Order ("Subscribed Services") are available for Customer's subscription use. Said date is Customer's "Service Date" for purposes of designating the start of any subscription term. Subscription terms are twelve (12) calendar months in duration. The Subscribed Services are non-refundable, except as otherwise specifically-provided herein.
2. Accela retains full ownership in the Subscribed Services and grants to Customer a limited, nonexclusive, nontransferable right to use the Subscribed Services, subject to the following terms and conditions: a) The Subscribed Services are provided for use only by Customer employees and to the extent of their duties for Customer, Customer's agents, contractors and officials; b) Customer shall issue each authorized user a unique user identification code to enable such authorized user to access the Service as permitted hereunder and user identification codes shall not be shared, rotated, or issued on a concurrent-usage basis; c) Customer may not make any form of derivative work from the Subscribed Services; d) Customer may not obscure, alter, or remove any confidentiality or remove or modify any copyright, trademark, or other proprietary notices; e) Customer may use the Subscribed Services only to process transactions relating to properties within both its own geographical and political boundaries and may not sell, rent, assign, lend, or share any of its rights hereunder or duplicate, copy, reproduce or publish the Map Images other than for Customer's internal business purposes; f) Customer is responsible for all activities conducted using its user credentials and for its users' compliance with the provisions of these Terms and shall report to Accela any actual or suspected violations of these Terms; g) use the Map Images for other than through the Website and Service; and h) All rights not expressly granted to Customer are retained by Accela. Accela will make the Subscribed Services available to Customer pursuant to these Terms during a subscription term. Customer agrees that its purchases hereunder are neither contingent on the delivery of any future functionality or features nor dependent on any oral or written public comments made by Accela regarding future functionality or features. Accela has no obligation for any claim based upon a modified version of the Subscribed Services, where such modifications were not made or authorized by Accela, or the combination or operation of the Subscribed Services with any product, data, or apparatus not provided by Accela.
3. The Subscribed Services will be hosted by Accela on Accela-owned equipment at a physically-secure commercial third-party hosting facility. Accela will perform system administration duties as required to maintain the service levels described below and to facilitate timely restoration of Customer's data and operations, if necessary, following unanticipated interruptions of the Subscribed Services. Accela will implement suitable network security measures to minimize the likelihood of unanticipated interruptions of the Subscribed Services. Accela will endeavor to provide Customer with no less than twenty-four (24) hours' notice prior to Subscribed Services unavailability due to planned maintenance (other than during Accela's standard maintenance window between the hours of 9:00 PM [21:00] Thursday and 1:00 AM [1:00] Friday Pacific time); Accela will endeavor to provide as much notice as is practicable under the circumstances for updates and fixes which may be applied on a more urgent basis. Accela will provide five (5) business days' notice prior to any planned network, server hardware, operating environment, or database modifications of a material nature.

4. Excluding the foregoing events, Accela warrants that the Subscribed Services will be available no less than ninety-nine point nine percent (99.9%) of each calendar month during live production. For each month during which the availability of the Subscribed Services does not achieve the established standard, Accela will provide a credit to Customer's account as calculated pursuant to Section 12 below, provided that the substandard availability is timely identified by Customer in writing and can be objectively verified. Credits accumulated pursuant to this Section may be applied to additional Accela products and/or services, but will not be refunded to Customer.

5. The performance requirements for the Subscribed Services, excluding planned maintenance downtime, are below and apply to live-production environments. Uptime is calculated on a calendar month basis as $U=O/(M-P)*100$, where U is Uptime, O is the amount of operational uptime for the Subscribed Services during a given month, M is the number of minutes in the month, and P is the number of minutes of planned downtime during the month. Credits are calculated on pro-rated monthly fees.

Uptime	Credit
≥99.9%	None
<99.9% but ≥99.0%	15%
<99.0% but ≥95.0%	35%
<95.0%	100%

6. In support of the Subscribed Services, Accela will provide Customer with a) a telephone number to contact the Customer Resource Center (CRC), Accela's live technical support facility, which is available from 4:00 a.m. until 6:00 p.m. Pacific time Monday through Friday, excluding Accela's observed holidays; b) one or more electronic mail addresses to which Customer may submit routine or non-critical support requests, which Accela will address during its regular business hours; and c) access to archived software updates and other technical information in Accela's online support databases, which are continuously available. Where support is needed to address non-functioning or seriously impaired Services and there is no reasonable workaround available, Accela will promptly respond to the support request and use commercially reasonable efforts to provide updates toward resolution of the issue.

7. The following are not covered by these Terms and Conditions, but may be separately available at rates and on terms which may vary from those described herein: a) Services required due to misuse of the Subscribed Services; b) Services required by Customer to be performed by Accela outside of Accela's usual working hours; c) Services required due to external factors including, but not necessarily limited to, Customer's use of software or hardware not authorized by Accela; or d) Services required to resolve or work-around conditions which cannot be reproduced in Accela's support environment.

8. Customer warrants that it owns or has been authorized to provide the data to Accela. Customer retains full ownership of said data and grants to Accela a limited, nonexclusive, nontransferable license to use said data only to perform Accela's obligations in accordance with these Terms. Throughout the term of the agreement, upon the request of Customer, Accela will provide Customer with: (i) a copy of its data in a database dump file not more than once per calendar quarter, (ii) an APO property conversion upload, not more than twice per annual term, and (iii) a Crystal Report placement not more than ten (10) times per annual term. Within thirty (30) calendar days following the end of its final Subscribed Services term ("End of Term"), Customer may request that Accela provide a complete copy of Customer's data and associated documents, as updated or modified by Customer's use of the Subscribed Services, in a database dump file format. Accela will comply in a timely manner with such request, provided that Customer a) pays all costs of and associated with such copying, as calculated at Accela's then-current time-and-materials rates; and b) pays any and all unpaid amounts due to Accela. Subject to the limitations above, Customer may authorize access to the Subscribed Services by creating unique user names and passwords ("Logins") up to the number of users indicated in the Order. Each Login must be assigned to a single individual and may not be shared or used by more than one such user. Customer may reassign any Login to another individual, provided that such reassignments do not circumvent the "single individual" requirement described in this Section. Customer acknowledges that transmissions and processing of Customer's electronic communications are fundamental to Customer's use of the Subscribed Services. Customer further acknowledges that portions of such transmissions and processing may occur within various computer networks not owned or operated by Accela. Customer agrees that

Accela is not responsible for any delays, losses, alterations, interceptions, or storage of its electronic communications which occur in computer networks not owned or operated by Accela.

9. Accela warrants that it has full power and authority to grant this license and that, as of the effective date, the Software does not infringe on any existing intellectual property rights of any third party. If a third party claims that the Software or Subscription Services do infringe, Accela may, at its sole option, secure for Customer the right to continue using the Software or Subscription Services or modify same so that it does not infringe. Accela will have the sole right to conduct the defense of any legal action and all negotiations for its settlement or compromise.

10. Accela has no obligation for any claim based upon a modified version of the Software or the combination or operation of the Software with any product, data, or apparatus not provided by Accela. Accela provides no warranty whatsoever for any third-party hardware or software products. Except as expressly set forth herein, Accela disclaims any and all express and implied warranties, including but not necessarily limited to warranties of merchantability and fitness for a particular purpose. Third-party applications which utilize or rely upon the Services may be adversely affected by remedial or other actions performed pursuant to these Terms and Conditions; Accela bears no liability for and has no obligation to remedy such effects. Except as set forth herein, Accela provides all Subscribed Services "as is" without express or implied warranty of any kind regarding the character, function, capabilities, or appropriateness of such services or deliverables.

11. LIMIT OF LIABILITY: ACCELA WILL, AT ALL TIMES DURING THE AGREEMENT, MAINTAIN APPROPRIATE INSURANCE COVERAGE. TO THE EXTENT NOT OFFSET BY ITS INSURANCE COVERAGE AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAWS, IN NO EVENT WILL ACCELA'S CUMULATIVE LIABILITY FOR ANY GENERAL, INCIDENTAL, SPECIAL, COMPENSATORY, OR PUNITIVE DAMAGES WHATSOEVER SUFFERED BY CUSTOMER OR ANY OTHER PERSON OR ENTITY EXCEED THE FEES PAID TO ACCELA BY CUSTOMER DURING THE TWELVE (12) CALENDAR MONTHS IMMEDIATELY PRECEDING THE CIRCUMSTANCES WHICH GIVE RISE TO SUCH CLAIM(S) OF LIABILITY, EVEN IF ACCELA OR ITS AGENTS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

12. Either Accela or Customer may terminate if the other party materially breaches these Terms and Conditions and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination or expiration, all rights granted to Customer are cancelled and revert to Accela.

13. The limitations and waivers described in Sections 10, 11, and 13 will survive the End of Term. Section 8 will survive the End of Term for a period of thirty (30) calendar days or for so long as is required for Accela to complete its response to a Customer request made during said thirty-days period.

Implementation of Accela Environmental Health

*Proposal prepared for:
Williamson County, Texas*



July 19, 2017

Submitted By: Carahsoft Technology Corp.

carahsoft



COVER LETTER

July 19, 2017

Mr. Doug Woodall, P.E.
Williamson County Road & Bridge
3151 S.E. Inner Loop, Suite B
Georgetown, TX 78626

Dear Mr. Woodall,

Thank you for the opportunity to support your goal to improve the management of your Environmental Health programs.

Carahsoft, FutureNet and Accela believe the public interface to government can be transformed through the intelligent application of technology. Together we provide solutions to help you improve the user experience for your citizens and businesses, to make processes clear and easy to understand, and to help foster a healthier environment.

As an Accela Services Partner we have seen the benefits to Agencies and their Constituents of Accela's powerful software capabilities and are excited to help Williamson County realized those same benefits.

**FutureNet is an Accela Value-Added Reseller and Top-Tier Certified Services Partner
with Accela Certified Implementation Professionals on staff.**

In the following proposed Implementation Plan, we outline the tasks to be performed to implement Accela's Environmental Health system. We understand it is Williamson County's goal to have a functioning system for OSSF by September 1, 2017. Currently the total elapsed project schedule for OSSF, assuming availability of Agency staff, is 5 weeks. In order to meet the September 1 requirement an agile approach statement of work (SOW) can be drafted to compress specific activities or move them to post Go-Live, to provide a functioning system as of 9/1. Once a contract is signed, Williamson County, Carahsoft and FutureNet can determine a workable schedule based on prioritizing the specific needs for the OSSF team.

Thank you for your consideration.

Julie Endres
Business Development Manager
FutureNet Group, Inc.
12801 Auburn Street
Detroit, MI 48223
O: 313-544-7117 ext. 337
M: 248-302-3027
JulieE@futurenetgroup.com

(this page intentionally left blank)

IMPLEMENTATION

While Accela Environmental Health can be configured as a completely custom solution, this proposal specifies the implementation of Accela's Best Practice Templates as a base configuration, with minimal customizations. This will ensure a faster and more cost-effective implementation.

Implementation Activities and Customizations included in this proposal:

- Agency branding – to give your Citizen Access web portal the look and feel of your agency website, and include such items as your logos and pictures.
- Merchant Account Integration – the system currently supports the following out-of-the-box: Official Payments, PayFlow Pro 4.3 (PayPal) or Virtual Merchants. If the Agency is working with another payment vendor, we can scope the level of effort as a separate deliverable.
- Fee Schedule Configuration – this proposal includes up to 10 fee item customizations
- Record Type configuration – this proposal includes the pre-configured record types in the Best Practices Templates.
- Batch reporting to your Financial System.
- Address/Parcel/Owner information upload.
- Security Set-up of Users, User Types and Security levels.
- Accela Citizen Access Set-up
- Accela GIS Set-up
- Accela Mobile Set-up
- Workflow customizations of up to 10 processes (e.g. changing labels, adding or removing inspection types, customizing lists of possible status results or checklist items, automatic notifications, preventing status changes until all tasks are completed, etc.)

Not included in this proposal, but can be offered for an additional fee:

- Additional Customizations beyond what is specified.
- Interfaces to other applications.
- Development of GIS systems and layers to be accessed by Accela's GIS Manager.
- Data Migration from other systems.

Williamson County – OSSF and WCCHD Environmental Health Implementation Package

Overview: The Environmental Health package proposed is based on Accela's Environmental Health Best Practices Templates and the 'out of the box' features available in the Civic Platform (i.e. Accela Citizen Access (ACA), Accela GIS, Mobile Inspector App, etc.) along with preconfigured workflows and additional configuration tailoring services. The following Best Practice update allotments would apply to the **full** project implementation for the **combined OSSF** and **WCCHD** implementation, listed as Option 2 in the Implementation Plan.

Timing: It is Williamson County's requirement to have a functioning platform for OSSF by September 1, 2017. Currently the total elapsed project schedule for Phase I, assuming availability of Agency staff, is 5 weeks. In order to meet the September 1 requirement an agile approach statement of work (SOW) can be drafted to compress specific activities or move them to post Go-Live, to provide a functioning system as of 9/1. Once a contract is signed, Williamson County and FutureNet can determine a workable schedule based on prioritizing the specific needs for the OSSF team.

Area	Item	Details	Included?	Allotted # of changes
Set up	Set up new Agency with Environmental Health Best Practice Templates	As part of the implementation package, Williamson County will get to take full advantage of Accela's Best Practice Environmental Health template configurations which are complete, preconfigured elements ready to deploy based on common Environmental Health set ups. Each represented program will have unique templates implemented, such as septic permits, retail food, planning applications, citizen service requests and complaints.	Y	n/a
	Set up staff user logins	Staff logins will be set up based on the number of software licenses purchased. For example, for the 12 OSSF licenses, 12 named staff user accounts will be set up.	Y	n/a
	Set up Agency map integration	The platform will be set up to integrate with Agency maps when an ArcGIS Server or Online map service is provided by the Agency. FutureNet Group will set up AGIS admin functions to integrate with the Agency's ArcGIS Server. Note: It is the Agency's responsibility to have their ArcGIS server set up for external access by Accela GIS.	Y	n/a
	Set up of Citizen Access branding	Agency to provide the municipal website branding for FutureNet to set up in the Accela Citizen Access portal.	Y	n/a
	Set up mobile apps gateway	The Civic Platform comes with a complete set of mobile applications the field staff can use on a mobile device, such as a smartphone or tablet. Agency can shop the app store and download the Accela developed mobile apps for free and preview them today. Apps developed by other	Y	n/a

		Companies can be downloaded for an additional charge.		
	Set up payment gateway for Accela supported	Supported payment vendors include Official Payments, PayFlow Pro 4.3 (PayPal) and Virtual Merchant and is part of the set up. Other payment gateways can be configured for an additional fee.	Y	n/a
Configuration set up	Record Type Enablement	As part of the implementation package, FutureNet will implement the specific Best Practice Template configurations for each group. During implementation, the FutureNet team will disable any existing record types (permits, licenses etc.) that the Agency will not use for the implementation. FutureNet will also work with the Agency to identify the record types they want to make available to the public in Citizen Access.	Y	n/a
	Workflow Process changes - a workflow tracks the Agency's major milestones or business protocols for a specific service they track and process, to ensure all steps are being followed based on regulations and ordinances.	Using the defined Workflow Processes configured in the BPTs, you can rename, add, and remove workflow tasks and workflow task status results. For example, if you require an Environmental Review for a specific service and the review is not already set up in the best practice template, you can ask to rename an existing task or ask to add the new task with new task status results. Each edit, update or removal of a workflow task or workflow status result is considered a single action change.	10	Allotted number of changes 10
	Inspection Group changes - an inspection group is a collection of inspection types and checklists designed for field staff when performing work out in the community.	Using the defined Inspection Groups and Checklist Groups configured in the best practice templates, you can rename, add or remove inspection types, inspection status results, checklist items, and checklist status results. For example, if you require different inspection status results, such as Rejected or In Compliance set up for a defined inspection type, you can request the creation of a new status result, so the inspection results match existing Agency language. Each edit, update or removal of an inspection type, inspection status result, checklist item or checklist status result is considered a single action change.	5	Allotted number of changes 5

	Setting up new fee items	Accela's BPT configurations contain existing fee items for each record type defined. During implementation, the FutureNet team will set up flat/constant fees using the unique fee names, such as a Septic Application fee is \$200 up to a maximum of 5 new fee items. Advanced fee item set up is an additional cost, examples include automatically calculating a fee item based on an inspection result, permit expiration date or using the advance business logic event manager scripting engine.	10	Allotted number of flat fee items set up 10
	Creating new Agency defined data fields, based on Agency processes, on the available record types.	The BPTs contain preconfigured data fields for each record type defined. During the gap analysis if the Agency determines they want to track other Agency data, the team will create new data elements to ensure information is tracked according to the Agency's business processes up to a maximum of 30 new data fields.	30	Allotted number of new data fields 30
	Update existing user group permission access	The BPTs contain predefined user roles, like inspector, daily user and Agency administrator, with specific access to items such as invoicing fees, voiding payments, canceling inspections, creating new record types, etc. If you create or update a defined user role with additional or reduced access, the team will edit the role. Each edit to the existing user group role is considered a single action change.	5	Allotted number of user role updates 5
	Citizen access updates on webpages, such as text instructions or intake processing components or field specific help language	The citizen portal is included with Accela's Best Practice Implementation package. It contains predefined page flows, section instructions, available record (application) types, etc. During implementation Agencies can request updates to the citizen portal pages and make them more tailored to their Agency processes. Examples of available updates include, adding a page flow component, like attachments, updating the section instructions with Agency language, include descriptive help instructions for specific Agency defined data fields. Each update to the citizen portal pages and sections are considered a single action change.	10	Allotted number of Citizen Access updates 10

Accela Property (APO) Data loads	Loading property information - address, parcel and owner data	During implementation, Agencies can have their property data (address, parcel and owner) loaded into the Accela software. Both citizens and staff can use the data for incoming permits, applications, complaints etc. and validate against the property dataset, to ensure work requests are within the Agency's jurisdiction. The <u>Agency</u> must provide the validated property data <u>from their defined master address database</u> in the specified pipe delimited text file format (see sample for reference), so that FutureNet can load the information into the Civic Platform. The Agency staff is required to view the converted property data and is required to verify the information converted is correct. The conversion effort will occur a maximum of 2 times.	Y	n/a
Implementation Support	User Acceptance Testing Support	FutureNet will provide User Acceptance Testing support and issue resolution. FutureNet will provide sample user acceptance test scripts that can be used by Agency staff to test the software configuration to ensure it is ready for daily use. Any issues or defects discovered during user testing will be submitted to FutureNet for resolution.	Y	n/a
	Project Management	FutureNet will provide Project Management over a maximum 3 month implementation period in order to coordinate project deliverables, FutureNet and Accela project team resources and provide status updates to the Agency's stakeholders.	Y	n/a
	Go-Live Support	FutureNet will provide 2 days of remote support for the Go-Live launch. Go-Live is defined as the official date in which the Accela Automation software moves from the test environment to production for daily Agency and Citizen usage. At the time of launch, FutureNet will assist the Agency in system validation and assist with staff preparation and transition. On-Site support for the Go-live launch can be provided at an additional cost.	Y	n/a

Training	End User and Administrative Training for staff	FutureNet to provide 1 day of End User training for OSSF staff, and 3 days of End User training for WCCHD staff. FutureNet to provide 3 days of administrative training to ensure staff is educated on how to configure additional record types for follow on programs. In addition, "Accela Community" is an online support site for Accela Software users, providing 24/7 access to user guides, reference materials and online training courses. Each staff member with a named user license can access these training courses when convenient. This online training focuses on the administration, maintenance, and augmentation of its Accela Civic Platform configuration.	Y	n/a
----------	--	--	---	-----

July 19, 2017

Doug Woodall, P.E.
Williamson County Road & Bridge
3151 S.E. Inner Loop, Suite B
Georgetown, Texas 78626

Re: Request for Quote Environmental Health Services System

Dear Mr. Woodall and members of the Evaluation Committee:

Accela stands ready to help the County achieve its business objective of obtaining a comprehensive, flexible environmental health services system in addition to satisfying the County departments using the new system. Our response details how Accela's Civic Platform will help Williamson County further engage with its citizens, and satisfy the needs that are most important to stakeholders.

I am authorized to bind the company contractually. Greg Walls, Business Development Executive, will act as Accela's primary contact for all matters regarding this response and any subsequent phases and can be reached at 713.480.9861 or via email at gwalls@accela.com.

Thank you for your consideration.



Jay Colfer
Chief Revenue Officer

Enclosures

About Accela

Accela provides a platform of cloud-based productivity and civic engagement software to governments of all sizes. The Accela Civic Platform includes solutions to cost-effectively manage critical enterprise functions and mobile apps to foster greater citizen engagement. From asset, land and legislative management to licensing, finance, environmental health and more, Accela's software drives efficiency for over 2,200 governments and is accessible to more than 160 million citizens worldwide. More than 80% of America's 50 largest cities have implemented at least one of Accela's many solutions. In 2017, the Company was named to Government Technology's GovTech100 for the second straight year. In 2016, it was ranked as one of Inc. Magazine's Fastest-Growing Private Companies in America, listed as a Top 50 Private Company in the East Bay by SF Business Times, named one of the 50 Highest Rated Private Cloud Companies to Work For, and designated a Certified Great Workplace by independent analysts at Great Place to Work. Accela is headquartered in San Ramon, California, with offices in, New York, Portland, Melbourne and Dubai. For more information, visit www.accela.com.



Environmental Health Services System

Williamson County, TX

COTS Software Solution Request for Quotes

July 19, 2017

Electronic Submission



Table of Contents

1	Vendor Experience	5
2	System Requirements	9
3	System Scope	13
4	Customization.....	17
5	Security / Access.....	19
6	Data Management.....	21
7	Reporting / Queries.....	25
8	Inspections	27
9	Financial Reporting	31
10	Public Access / Communications.....	33
11	Appendix - The Accela Difference	37

About Accela

Accela provides cloud-based civic engagement solutions for government. Accela's Civic Platform, which includes open APIs and mobile apps, enables and improves core processes for city, county, state and federal governments. Accela's solutions uniquely address the diverse needs of their constituents by making publicly available information more accessible. The Accela Civic Platform includes solutions for land management, asset management, licensing and case management, legislative management and more. With more than 2,000 customers worldwide, Accela is headquartered in San Ramon, California, with offices in San Francisco, New York, Portland, Melbourne and Dubai. For more information, visit 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.

1 Vendor Experience

The Proposer has been in business for more than 5 years



Accela was formed in 1981 and incorporated in California in 1999. We are a privately held corporation with headquarters in San Ramon, California. To meet growing global demand, we employ 450 technology professionals and maintain business offices in the United States, United Arab Emirates, and Australia. Our Civic Platform is implemented in virtually all 50 states, as well as in Canada, Puerto Rico, Australia, New Zealand, and the United Arab Emirates.

Throughout our history, Accela has served over 2,200 separate agencies and thousands of their departments with our Civic Platform.

In 1999, Accela launched the Accela Civic Platform — a web-enabled enterprise platform. For the last 18 years, our focus has been delivering advanced web-based solutions to back-office and field-based government workers:

- ➡ Strong mapping integration (Esri GIS), mobility apps, online citizen services, and integrated voice response (IVR)
- ➡ On premise or cloud deployments
- ➡ Perpetual License or Subscription-based pricing models
- ➡ Multitenant and regional solutions
- ➡ Multilingual and internationalized solutions
- ➡ Established strategic partnerships with industry leaders including Accenture, Adobe, Apple, Bluefin, DocuSign, e-PlanSoft, Esri, Hewlett Packard, Microsoft, Oracle, Panasonic and Selectron.

In 2015, Accela further strengthened our commitment to public health through the acquisition of Decade Software Company, a leader in Environmental Health informatics and a strong partner to the National Environmental Health Association (NEHA). In so doing, Accela acquired a solution and staff with experience in implementing over 100 public health agencies with industry leading regulatory software.

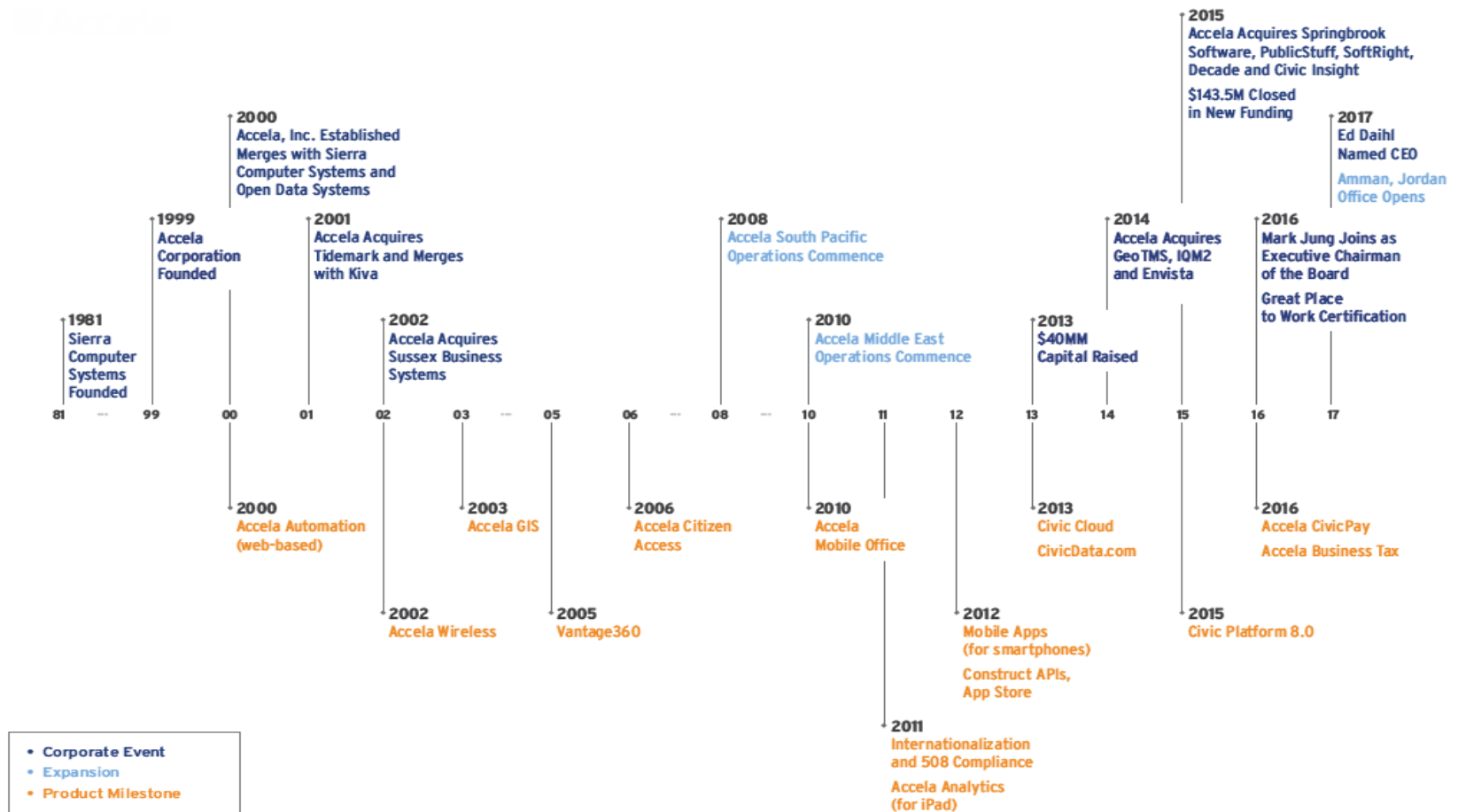


Exhibit 1: Accela's Corporate Timeline

Environmental Health Software Systems (System) have/has been in use for at least 5 years by another governmental entity

Accela's Environmental Health practice has been in use at government agencies since 2003. The Accela Environmental Health team is responsible for implementing over 100 similarly organized environmental health data management systems. Through this experience, the team brings decades of experience to include best practices, opportunities for optimization, and a rich understanding of local health department delegated and native responsibilities.

The System is preferred to be a proposer hosted solution

Yes. Accela Environmental Health can be hosted with Accela within the Accela Cloud.

Proposer is involved in the environmental health industry in a capacity beyond providing the software product.

Our SVP of Environmental Health, Darryl Booth is a long-time specialist in technology and environmental health. Darryl is affiliated with the Conference for Food Protection, National Environmental Health Association (Technical Advisor), California Retail Food Safety, and writes a column for the Journal of Environmental Health.

Accela Environmental Health is partnered with the National Environmental Health Association (NEHA) to advance Environmental Health through a technology initiative called Building Capacity. NEHA's vision for this partnership is to employ an industry leading environmental health technology firm to raise the technical aptitude and practices of the environmental health community.

"NEHA and Accela share the goal of supporting environmental health professionals to be more effective and efficient in the local communities they serve. Whether monitoring our food safety, our drinking water quality, or air pollution, use of current technology is a vital tool in recording and tracking data saving countless hours of manual documentation."

- Dr. David T. Dyjack, Executive Director/CEO

(This page intentionally left blank)

2 System Requirements

The System must be a web-enabled application

Yes. Accela Environmental Health is a web-based and web-accessed solution.

The System must not rely on web connectivity for full functionality and historical information

Yes, inspectors may work in the field (including inspection history) without internet connectivity. This can be achieved within the proposed mobile applications' "Download Work Offline" mode; whereby an inspection and its related record, documents and data attributes are stored offline on the Inspector's device for review and maintenance in the field without connectivity. Configuration can be put in place the locks the related record when an inspection is being conducted against a record; thus, ensuring no back-office changes are permitted until the Inspector has completed the inspection and successfully synced the resulted/dispositioned inspection to the back-office. Naturally, back-office functions in the browser require a network connection.

The system must have a mobile component

Yes. Accela Mobile, the field component of the Civic Platform, has received considerable design and investment to make it an intuitive and easy-to-use application for field and inspection staff. All the noted elements of this requirement can be performed by the product.

Our proven solutions for operational efficiency and civic engagement through mobile apps combine to provide extensibility by employing a dynamic cloud-based platform to support the needs of both agency employees and their user community.

Accela Mobile is more than an application - it is a complete strategy central to our government-centric development efforts. Our mobile strategy is to develop role-specific productivity and engagement solutions for every role in government, on every platform, while allowing public agencies to leverage our Software Development Kit.

Accela is the only vendor in our market with a published mobile application development kit allowing third party developers, including current clients, to develop custom mobile applications to work with our Civic Platform. We understand mobile applications are an environment supporting evolving creativity and innovation. Accela makes it easy for third party developers to build custom mobile apps that work against our Civic Platform.

The System must be Windows based

Yes. As a web-based and web-enabled solution, Accela Environmental Health is designed to function across multiple operating systems, including Windows.

Provide real-time integration between application and payment processor.

Yes. All payments are received and reflected in a real-time manner.

Prefer integration with our Identity Store (AD).

Accela's Civic Platform includes support for Active Directory repositories through LDAP as the authentication source for users. When the Civic Platform is configured to use an external directory server users are prompted by the application for their username and password which are then authenticated against the directory server providing a single point of administration for users. The implementing agency must accommodate certain network traffic (e.g., firewall rules) to accomplish this.

Data should be cloud based and retrievable for the duration of this contract, plus any extensions.

Yes. Your agency's data within Accela Environmental Health will remain the County's property and retrievable at your convenience. As per our standard Subscription Agreement, throughout the term of the agreement, upon the request of Customer, Accela will provide Customer with a copy of its data in a database dump file not more than once per calendar quarter.

The System includes built-in intuitive help functionality

Yes. Help is accessible across all Accela Environmental Health screens and is contextual based on the user's navigation; clicking help while reviewing a record details will display help topics related to record details and clicking help while reviewing inspection details will display help topics related to management of inspections.

The Provider will furnish written and on-line user and administrator manuals

Yes. Accela Environmental Health has extensive manuals for users and administrators in print and online through Accela's Success Community site for clients.

(The remainder of this page intentionally left blank)

(This page intentionally left blank)

3 System Scope

The System includes modules for On-Site Sewer Facilities, Retail Food Establishments, Public Health Nuisance Complaints, and Integrated Mosquito Management

Yes. The Accela Civic Platform manages Onsite Wastewater Treatment, Retail Food, Nuisance, and Mosquito (Vector) Control. The EH Best Practice Template features forms, reports, and workflow which are specific to these and other health programs.

Each License/Permit linked to a single facility carries its own inspection frequency, fee schedule, valid from/to dates, etc. For example, a Marriott with a Housing, Food, and Pool permit shall be managed tracked independently.

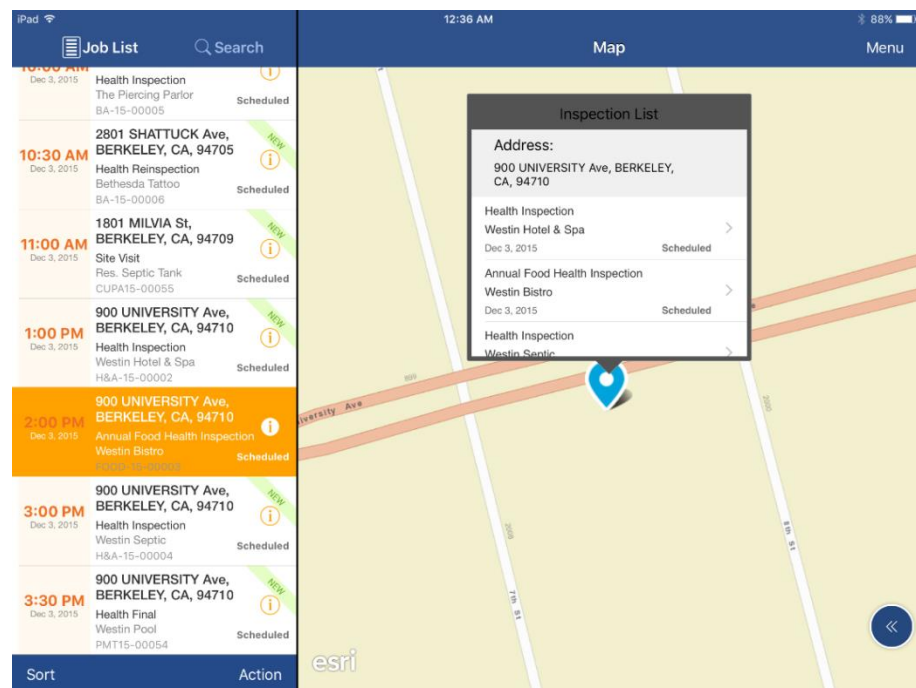
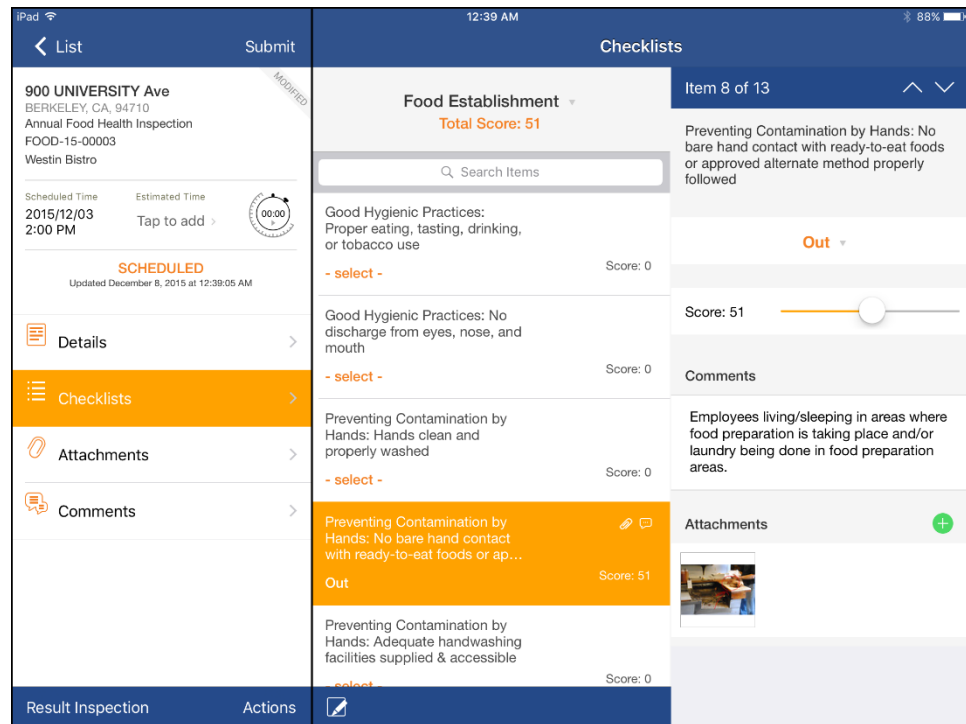


Exhibit 2: My Inspection List - Multiple Inspections Due at the Same Location



The screenshot displays the Accela mobile application interface on an iPad. The top status bar shows 'iPad', signal strength, '12:39 AM', and '88%' battery. The app's navigation bar includes a back arrow, 'List', 'Submit', and 'Checklists'. The main content area is divided into two panels. The left panel shows inspection details for '900 UNIVERSITY Ave, BERKELEY, CA, 94710', 'Annual Food Health Inspection', 'FOOD-15-00003', and 'Westin Bistro'. It indicates a 'SCHEDULED' status with a 'Scheduled Time' of '2015/12/03 2:00 PM' and an 'Estimated Time' of 'Tap to add'. A 'Details' section is visible below. The right panel, titled 'Checklists', shows 'Item 8 of 13'. It lists several checklist items with their scores: 'Good Hygienic Practices: Proper eating, tasting, drinking, or tobacco use' (Score: 0), 'Good Hygienic Practices: No discharge from eyes, nose, and mouth' (Score: 0), 'Preventing Contamination by Hands: Hands clean and properly washed' (Score: 0), 'Preventing Contamination by Hands: No bare hand contact with ready-to-eat foods or approved alternate method properly followed' (Score: 51, highlighted in orange), and 'Preventing Contamination by Hands: Adequate handwashing facilities supplied & accessible' (Score: 0). A 'Comments' section on the right contains the text: 'Employees living/sleeping in areas where food preparation is taking place and/or laundry being done in food preparation areas.' An 'Attachments' section shows a photo of a person working in a kitchen. The bottom navigation bar includes 'Result Inspection', 'Actions', and a pencil icon.

Exhibit 3: Populated Checklist Item with Attachment



Exhibit 4: Taking Photo and Redlining Violation

The System supports 12 OSSF users, for approximately 1,400 annual permits, 3 site visits per permit, 700 critical violations and other follow up inspections, and approximately 2,100 service requests

The System supports 25 users in Retail Food Establishments, General Sanitation, Public Health Nuisance Complaints, and Integrated Mosquito Management, for approximately 3000 retail food permits, 4000 retail food inspections, 300 retail food plan reviews, 200 general sanitation inspections, 100 public health nuisance complaints, and manage information and vector control response for 800 surveillance traps per year for mosquitoes.

The requirements cited above are easily met by the Accela Civic Platform Cloud.

Business Requirements Scalability

The ability to incorporate unplanned changes in business requirements and, in turn, how the solution can be reconfigured to adhere to these changes, is at the forefront of why the Accela Civic Platform was designed and continues to be upgraded to maximize its flexibility for public agencies.

Furthermore, agencies can define their own modules within the Civic Platform solution stacks; not limiting them to only the “out of the box” modules that are rigidly defined by other competitors. This offers endless possibilities for business-unit segmentation (i.e. the definition of a Body Art module) while still leveraging the enterprise capabilities of the Civic Platform through GIS, Global Contacts, Projects, Workflows, Fee Assessment and other relevant elements that ensure all Departments are working towards the same goal of better serving their customers.

Performance Scalability

Changing business requirements no longer present an obstacle and risk is diminished if in fact not eliminated. The n-tier scalability of the Civic Platform can accommodate the growth and changes that occur within the County as needed. The solution may be scaled both vertically (by adding additional processors) and horizontally (by adding additional server hardware) as needed. Recent performance test results show the Civic Platform running with thousands of simulated users while running against a huge data set (up to 10 million records and one table for agency-defined fields with 90 million records).

Accela typically scales by adding more services at each tier. For instance, additional web services can be created and load balanced to offset increasing demand at the web layer. This can be accomplished by adding an additional server with a new set of Accela services. At the application tier, additional the Civic Platform servers can be added into the application pool cluster. At the

database level, typically performance is improved by adding more memory, more disks, and better CPU power.

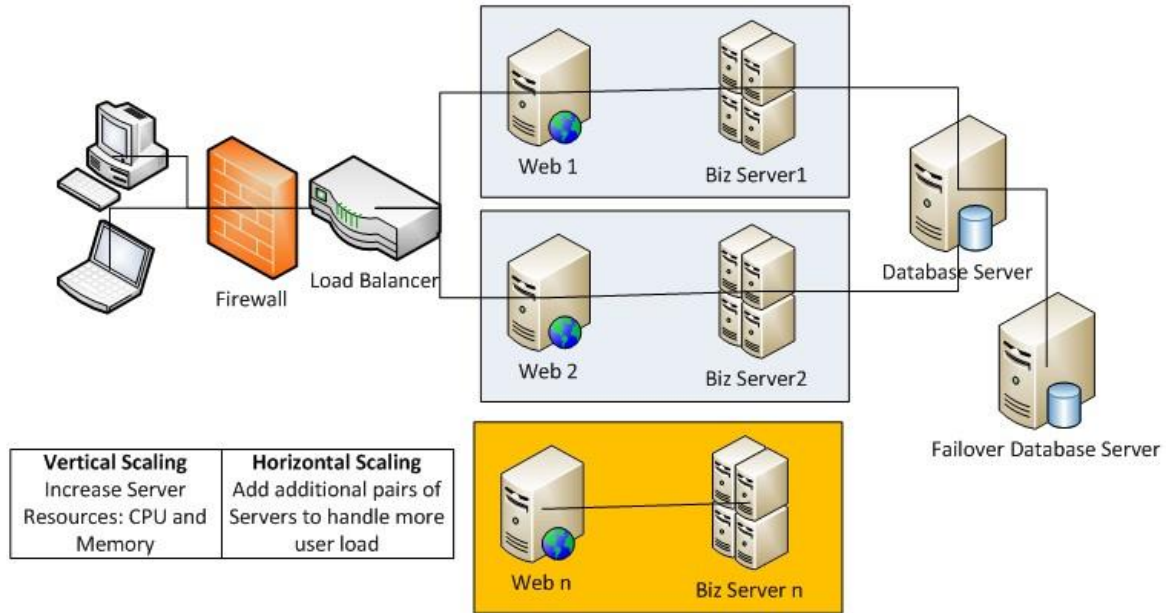


Exhibit 5: Civic Platform Scalability

(The remainder of this page intentionally left blank)

4 Customization

The System generates and prints standards and custom permits, forms, certifications, inspections reports and address label information

Yes. Accela Environmental Health will generate, save and attach, display and print any document generated on-screen or automated based on your agency's requirements, ordinances and business rules. The agency may configure its own reports, letters, certifications and forms at any time.

The System has unlimited user-defined letter and email templates for communications with customers/applicants and can be populated from the System data.

Yes. Templates for letters, labels and other documents are inherent capabilities of the Ad Hoc Report Writer or the Reporting Engines. The agency may configure its own letter and email templates at any time.

The System allows Administrators to add additional information, notes, instructions and data elements to page layouts.

Yes. Accela Environmental Health supports adding additional information and/or instructions to forms and screens.

The System allows customizations of labels and headers to match Williamson County and Williamson County and Cities Health District terminology and department naming conventions.

Yes. All the listed fields are representative of out of the box data elements that are configurable within the proposed solution.

(This page intentionally left blank)

5 Security / Access

The System must provide for the additions, deletion and modifications of users by the administrators.

Yes. System administrators can add, modify or deactivate users, as well as establish the roles for each user. User maintenance can be done without relying on the Accela team. The solution provides sufficient controls at various levels/tiers that only authorized users can access data based on their User groups and role(s).

Note: With Active Directory (AD) integration, users are created in the Active Directory, then linked to the Civic Platform.

The System must provide for role based security for allowing/disallowing access to functional areas as set by the administrators.

Yes. The Accela Civic Platform is entirely governed by role and function-based security applicable to every user, both internal and external. These permissions to the system and to what users can access, view or complete are governed by the assignment of such roles/privileges by your System Administrators.

The System has the ability to interface with third party applications for financial applications, GIS and payment processing.

Yes. Over 100 API's have been developed by Accela to aid in integration of the solution to third party document management, financial and other systems agencies have deployed. Accela GIS includes an administrative tool for setting up and configuring features and integration with GIS map services. Accela GIS diagnostic tools are included for troubleshooting and checking for any issues with configuration items as well as Esri service issues that may impact integration.

The System has the ability to link address information from GIS and provide mapping applications or links to mapping

Yes. Employing Accela GIS, any record can be displayed and linked by GIS with respect to location and details, including those related to complaints. Geo-spatial mapping can be performed in the system in conjunction with its GIS component and the County's Esri GIS system.

The Civic Platform's utilization of Esri's JavaScript map viewer allows it to leverage several powerful Esri tools, including its predictive geocoding service published via ArcGIS Online. This service allows a back-office Accela user to

simply begin typing the desired work location and the predictive recommended results begin to auto-populate. Whether a user is looking for a specific address, an intersection or a place of interest, such as an airport, the map will identify the desired location and zoom the user to it on the map.

The System can link to websites directly from software (such as to statutory regulations sites)

Yes. Configuration supports the ability to embed links in the solution to allow users to access external sites and sources of information from within Accela Environmental Health.

The System must allow for the auditing of user activity (adds, changes, deletes & system logins).

Yes. User Activity Reports are common across our Accela customer base and as such we have pre-built a base user activity report within the solution. However, the County is welcome to modify reports and/or create entirely new user activity reports through Accela's Ad Hoc Reporting tool and/or through any of our supported third-party reporting engines. All System Audit Trail and transactional activity within the Accela Civic Platform is accessible for reporting.

(The remainder of this page intentionally left blank)

6 Data Management

The System generates unique record ID numbers matching Williamson County protocols.

Yes. Record numbers are issued sequentially and can be defined to correspond to an agency's desired format. In all cases, such identification numbers are unique.

The System allows users to view and link to all related records from one record or location.

Yes. The hierarchy of a record's relationship can be viewed by users, as well as the ability to search for records within Accela Environmental Health and relate as parent or child. Example: Complaints may be linked to a License or Permit.

Complete permit histories must be accessible by address, parcel number, permit number or GIS coordinate. Must include statement, based on history data within Accela.

Yes. Users can search for records by location including address, parcel or other geographic location information, as well as permit number or other record attributes. *Note: Based on proposed implementation there would be no permit history converted into Accela.*

The System must allow for hyperlink documents and other data sources (PDF, MS Office documents, pictures, legacy system MS SQL databases, video).

Yes. Authorized users can create, modify and delete hyperlinks to internal and external documents, records, files or sites. The definition and inclusion of hyperlinks in the solution is entirely determinable by system administrators and can be modified at any time.

The System must provide comprehensive records searching and sorting capabilities by name, address, parcel information, permit number, unique words and program identifiers.

Yes. All data fields in the solution are available as a search parameter including those shown in this requirement.

The System provides for multiple addresses for one property (i.e., street address, P.O. Box, etc.)

Yes. Each facility can have multiple associated addresses each with a different address type, definable by the County

The System provides for transfer of ownership of permitted items

Yes. Facility ownership can easily be transferred between owners; Accela Environmental Health can transfer details related to those records as well.

The System provides for linking or attaching digital files (.pdf, .jpg, etc.)

Yes. The Accela Civic Platform provides for attaching or limiting digital files (.doc, .xls, .dwg, .shp, .jpg, .pdf, etc.). The solution has both on-board document management as well as the capability of interfacing with enterprise document management systems to manage the attachment of digital files.

The System provides for identifying contractor, installer, agent and third party relevant information.

Yes. The Accela Civic Platform features the capacity to maintain an inventory of contractors and their certification information. Using system configuration, specific functionality may be defined and enforced for different categories of external users like licensees, employers, food handlers, third-party administrators, etc.

The System provides for partial applications that have not been completed or do not meet requirements to be placed in a hold status until the application(s) can be completed or requirements have been met.

Yes. The Accela Citizen Access portal provides a "Save and Resume" feature that allows applicants to save a partially completed application and return to complete it later and time. Payment will be required for the application to be formally submitted for processing by County staff. The County can define how long incomplete applications remain active and can automatically or manually purge applications that exceed that time.

The Civic Platform allows the County to place conditions (such as hold and stop work) on permits that restrict them from progressing in workflow, associate conditions with reviews and specific employees, set due dates for resolution of conditions and require the user entering conditions to supply a reason. Conditions may be placed to stop work or otherwise affect processes, as well as to inform

staff of important items for resolution or informational purposes. The system can be configured to require that every staff member setting a condition supply a reason for the condition. Conditions may be released automatically (e.g. upon satisfaction of requirement) or released by authorized users.

The System provides for tracking of all customer contacts by phone, email, written correspondence, to include dates, times and comments fields.

Yes. Accela Environmental Health includes a Communication Manager that can be linked to the County's exchange server to help track email communications related to cases and automate the delivery of email to related record, permit or facility contacts based on workflow or other configured business rules.

(The remainder of this page intentionally left blank)

(This page intentionally left blank)

7 Reporting / Queries

The System comes with standard reporting capabilities and ad-hoc reporting to create customized reports or queries.

Yes. The solution provides standard reports as well as a built-in Ad Hoc Report Writer that allows non-technical agency staff to create, modify and deploy reports (standard or custom) throughout the system over time. Reports may be exported into formats such as PDF, MS Word, MS Excel and XML.

The System provides dash-board reporting.

Yes. End users can use the Dashboard functionality provided inherently by the solution to post key data to a wide variety of graphical formats (bar/line graphs, odometers, pie charts, etc.), including the elements outlined by this requirement.

The System provides for report preview functions

Yes. Accela Environmental Health can provide a preview of the report, then allow the user executing to determine export, delivery or saving options.

The System has the ability to convert and save ad-hoc and standard reports in Word, Excel and/or PDF formats.

Yes. The solution allows search or report data to be exported to Word (.docx), PDF Format (.pdf), Comma Separated Values format (.csv), and Excel format (.xlsx).

The System provides for trend analyses by user defines data fields

Yes. Ad hoc reports can display trend analysis by data fields (e.g. by dates) showing data over time.

The System provides for standard and ad-hoc reporting if financial data and information sorted and linked to various data fields.

Yes. All data fields, including those created as user-defined fields, can be used as report parameters.

The System provides for status and action reports and provides selected users with notifications and/or alerts.

Yes. Alerts of this type can be created and generated by system administrators using the Announcements feature in Communication Manager.

The System provides for public access to selected data as part of typical open records searches or inquiries

Yes. Governed by business rules, system administrators may grant the public access to view a public record report regarding information maintained in the solution.

(The remainder of this page intentionally left blank)

8 Inspections

The System provides for scheduled and ad-hoc inspections.

Accela's Civic Platform allows for both scheduled and unscheduled (ad hoc) inspections. Ad hoc inspections may be completed at any time by authorized users.

The System allows for mobile devices to have full access to the database remotely

Yes. Accela Mobile fully supports offline data reporting and can download required inspection data and documents to the device when lack of connectivity is anticipated.

Offline capabilities.

Yes. The Accela Civic Platform natively supports offline capability and will automatically synchronize when connected to a Wi-Fi or cellular data connection.

The mobile devices will have full access to standard reporting features while in the field

Yes. Accela Mobile fully supports offline data reporting and can download required inspection data and documents to the device when lack of connectivity is anticipated.

The System must provide for the ability to sync inspection schedules with Microsoft Outlook

With additional configuration, Accela leverages MS Outlook integration and with configuration of the Business Rules Engine, the solution can push each inspection request to an inspector's Outlook calendar.

Administrators must have the ability to manually assign and reassign inspections and modify work schedules

Yes. Administrators can manually assign and reassign programs/inspections to inspectors.

The System provides for automatic scheduling of inspections and groups by location per day.

Yes. The solution provides for automatic assignment of inspections based on location or other business rules. The proposed solution includes robust inspection scheduling and management capabilities including the definition of agency and customer initiated inspections, recurring inspections and automated, event-triggered inspections. Each inspection type can possess its own unique statuses/dispositions, checklists, printable documents, standardized comment/code libraries and much more. Inspection assignment logic can factor in a multitude of factors including geographic location, trade qualifications, inspection type, inspector bandwidth and/or history with the product/business/location. Once assigned, Inspectors can optimize their inspection routes based on optimal distance (i.e., sequence by proximity), optimal time (i.e., fastest route) or by manually organizing their route. Each inspection type can be defined with an "average time to complete" which will factor into the calculation of the approximate end time from the time the inspection is scheduled to start. These estimates can then be cross-referenced against the actual start and end time of each inspection to help populate key performance indicator (KPI) reports and dashboards. Each inspection captures requested date, scheduled date, inspection date, start time and end time.

The System provides for ad-hoc / additional inspection forms that may only require permitting fee payment, inspections reporting, follow-up inspections and maintenance reporting in any combination depending on the type of permit requested/required.

Yes. The elements of this requirement are supported by the solution.

The System provides the ability to link photos from the field to the inspection report.

Yes. Photos taken during inspections can be included in inspection reports.

The System provides for the review and access to previous inspection report for the purpose of establishing an inspection history for a specific location, permit or facility.

Yes. The elements of this requirement are supported by the solution. The Civic Platform will maintain a permanent history of all inspections and related activity occurring on a specific site or location. While changes to this saved information are permissible by authorized users, the System Audit Trail will record all such changes, deletions or additions and provide the user login, date and time of such modifications.

The System provide for electronic signatures or similar.

Yes. Signature collection is a central feature of the proposed solution. The inspectors signature (on file) may be injected into the generated report. The Accela Civic Platform can be interfaced to signature pads at the front counter so an agency can capture electronic signatures in the office and apply them to permit types and for other business purposes. The Accela Civic Platform also allows users to store electronic signature images including preprinting a signature on a form letter, notice, etc.

In addition, Accela Mobile, the system's mobile government application, can collect electronic signatures on field devices which are automatically linked to a specific inspection record.

The System provides for inspections results to be emailed from the field to a contractor, owner, or installer.

Yes. Inspection results can be delivered to facility operators or other contacts by email. Results can also be viewed by facility operators through Accela Citizen Access.

The System will provide for real-time syncing from the field mobile devices to the database and the capability to store and then sync with the system when back in the office if service cannot be established at a particular field location.

Yes. The proposed mobile applications are designed to capture data in the field and can operate in environments not supported by wireless connectivity or in those in which such connectivity may be temporary lost.

The System tracks time for inspections and time spent on tasks and assignments outside of inspections

Yes. Inspection timeframe rules based on inspection type for automatic inspection scheduling may be configured for support by the solution.

Administrators/Supervisors can track and monitor employee time and activity, including activities outside of inspections (e.g. plan reviews, meetings, training, sick time, vacation, etc.). All system users can be set up to allow time entries to track work activities outside inspections. Time spent completing workflow tasks can be required and used for reporting purposes. All employee time activities can be delivered to the County's payroll system via API integration.

(This page intentionally left blank)

9 Financial Reporting

The System will generate and print batch financial reports segregated by module and user-defined access to modules

Yes. Reporting across modules on all standard and user-defined fields is supported through Ad Hoc Report Writer and the seamlessly integrated Reporting Engines (Crystal Reports, MS Reporting Services, and Oracle Reports).

The System generates invoices and fee requirements based on established fee schedules, formulas, or other information entered by the user

Yes. The solution can calculate license fees, late fees, and penalties based on user-defined fee schedules and business rules.

Fee/discount/penalty transaction codes can be added and edited by administrators

Fees can be edited or added to records based on user configuration limiting access to administrators.

Administrators have the ability to over-ride fees, add fees or modify fees

Users with administrator role can add fee calculation rules for assigning specific fees. Authorized users have the inherent ability to make any additions or changes to fee calculation rules. If such changes are made to an existing case type, those changes will be subject to provisions of the System Audit Trail. Additionally, fees not preconfigured for any record type can be added based on user configuration.

The System has the ability to accept cash, checks, money order, ACH and credit/debit card payments

In-person or mail-in transactions will still make cash or check payments possible. Credit card transactions are accepted using the agency's web portal, which provides the capability to make online credit/debit card payments 24/7 via any standard web browser.

The System must have the ability to submit payments to, debit payments from, track, and report payments across multiple accounts or multiple account types as defined by the user for segregating monies based on modules, reporting on the back-end, and providing detailed invoices

The Accela Civic Platform can manage customized financial information, accounting for all monies collected, including accounts receivable and invoicing.

The System allows for authorized users to make refunds

An authorized user can un-assign a payment that has been assigned to satisfy a fee and either reassign or refund the payment. Authorized users can make these types of modifications in the fee and cashiering element and all such changes subject to provisions of the audit trail.

The System includes auditing functions

All fees and cashiering operations fall under the solution audit trail providing users with trusted accounting for all financial transactions. The same is also true where system administrators have adjusted/changed fees for business purposes.

The System can export all transaction data in *.csv format defined by user

Supported output file formats are: CSV, PDF, Microsoft Excel, XML, Microsoft Word and RTF.

(The remainder of this page intentionally left blank)

10 Public Access / Communications

All communications records must be maintained

Yes. Activities related to facilities or permits will track phone calls, letters and other actions. All electronic communication will be maintained in the Communications Manager element of the record, providing a full history of outbound and inbound communications related to the permit or facility.

The System provides for individual, selected and mass communications distribution to customers by authorized users

Yes. The solution supports this requirement as described.

The System must provide for a public web portal for customer s to apply for permits, renewals, inspections as applicable

Yes. Accela Citizen Access will provide the public and facility-related contacts the ability to complete searches, apply for new permits, pay fees, see inspection results, submit and track complaints.

The System provides for the collection of demographic information as may be required for various programs within the County

Any demographic data defined by business rules can be setup for capture for external users, including those which the County sets as "required".

The System must provide for payment acceptance via the Web

Yes. The proposed solution fully supports online payment for services across all County records and programs. Fees assessed through the online portal are automatically consolidated into an invoice prior to payment.

The public web portal can upload photos or files

Yes. Any type of document or file that exists in an electronic format can be uploaded via Citizen Access online, through the back-office as well as through all applicable mobile applications. These documents, once uploaded, can be viewed in their native formats by authorized staff and online users. The County can configure limits regarding the acceptable file types that can be uploaded, their maximum size, when such documents can be uploaded, any supporting data

attributes that need to be collected alongside an applicable document type and to whom those documents are visible.

Data shown and used on the public web portal must be automatic with predefined parameters

Yes. Virtually every field in the system is available as a search parameter and customers who access the solution through its online web portal can search data that your agency makes available to them.

The System must provide for Secure Portal Users and require a unique user ID and password.

Yes. Usernames will be unique for both staff users as well as public users on Accela Citizen Access. Password creation and updates are of the end user's determination and can be controlled by password restrictions/requirements as set forth by the County.

The System must provide for unique user ID and password for staff users that can be maintained by the Administrator

Yes. Usernames will be unique for both staff users as well as public users on Accela Citizen Access. Password creation and updates are of the end user's determination and can be controlled by password restrictions/requirements as set forth by the County.

The public web portal must be accessible to the public by mobile devices and meet the requirements of the ADA.

The public-facing Accela Citizen Access portal offers unprecedented features and functionality that empower agencies to conduct business with the citizens they serve in a 24/7/365 including application/request submission, research, GIS mapping, fee payment, license renewal, project management and much more. Citizen Access supports non-registered (i.e. public), registered and third party contributors to work collaboratively with the city. Those with a registered account are welcomed with a personalized dashboard highlighting items that require the user's immediate attention, open invoices, active projects and recent work activity with the municipality. Citizen Access is also mobile-browser adaptive, ensuring that those customers that access the site from a smartphone or other mobile device are provided with a powerful and intuitive user experience uniquely suited to their device. Citizen Access is also 508 Compliant, making the software accessible for individuals with physical, sensory or cognitive disabilities.

The System must provide for securing applications once submitted and not allow any changes or edits by the external user or public after submission, but provide for staff users to edit as needed to meet minimum requirements.

Yes. The solution allows an authorized user to setup prerequisites of any kind (e.g. licenses, certifications, education, etc.) All these prerequisites will be validated during the submission process using configuration and the Accela business rules engine. The system will alert the Applicant if they do not meet any of the prerequisites configured by the authorized user.

The System must provide for permit application fields that can be set by the Administrator for the specific permit type or form required

Yes. Accela Environmental Health provides each agency with the ability to configure as many fields as needed and required specific to each case type.

(The remainder of this page intentionally left blank)

(This page intentionally left blank.)

11 Appendix – The Accela Difference

To further support our proposed solution for the County’s needs, we have provided additional, relevant information in this appendix that we believe adds value to the County’s overall understanding of Accela’s offering.

11.1 Your Platform, Your Modules

The County defines your own modules within the Accela Civic Platform solution stacks. You are not limited to only the out-of-the-box modules that are rigidly defined by other competitors. This offers the County endless possibilities for business-unit segmentation while still leveraging the enterprise capabilities of the Civic Platform through GIS, Global Contacts, Projects and other relevant elements. This ensures that all departments are working towards the same goal of better serving your customers.



- Mobile App
- CRM
- Knowledge Base

CITIZEN RELATIONSHIP MANAGEMENT

A digital communications system to facilitate service requests and access to city services. A mobile app, backend CRM, and web tools help create more connected, engaged communities.

accela.com/citizen



- Planning
- Inspections
- Permitting

LAND MANAGEMENT

Planning, permitting, inspections, and code enforcement allow for 24 hour access, internal collaboration, and mobile access resulting in improved customer service & revenue.

accela.com/land



- Agenda & Minutes
- Civic Streaming
- Digital Boardroom

LEGISLATIVE MANAGEMENT

Increase transparency and trust by managing your public meetings online. With streaming & automation capabilities, you can make increased efficiency look easy.

accela.com/legislative



- Finance & Budgeting
- Utility Billing
- Payroll & HR

FINANCE & ADMINISTRATION

A comprehensive financial suite for local governments and special districts that spans budgeting, payroll & HR, and utility billing.

accela.com/finance



- Endorsed by NEHA
- Flexible Configuration
- Extensive Reporting

ENVIRONMENTAL HEALTH

Make data-driven decisions about your environmental health operation using a single, consolidated database to boost efficiency, compliance, and fee-collection.

accela.com/environmental



- Business Licensing
- Alcohol & Tobacco
- Recreation

LICENSING & CASE MANAGEMENT

Manage and regulate licensing while streamlining revenue collections, enhancing enforcement actions, and improving customer service.

accela.com/licensing



- Utility Coordination
- Events & Incidents
- Citizen's View



- Water Systems
- Streets & Traffic Devices
- Facilities & Fleets

RIGHT OF WAY MANAGEMENT

Map-based coordination provides visibility into street activities, reduces the impact of infrastructure projects on residents & businesses, and saves money.

accela.com/rightofway

ASSET MANAGEMENT

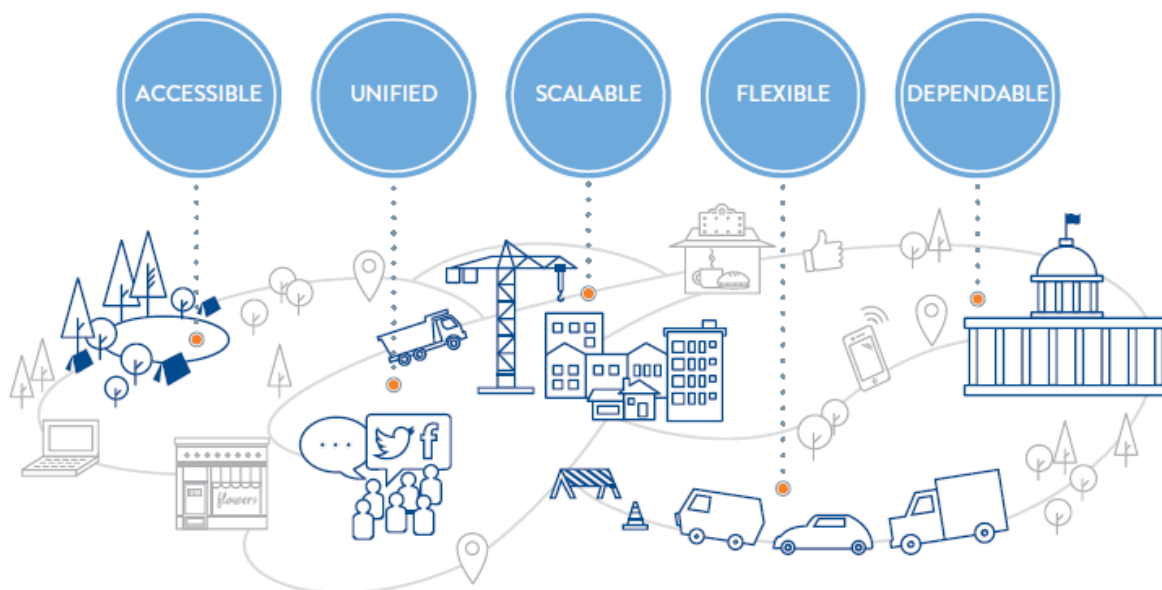
Ensure your agency's infrastructure assets are managed effectively while providing critical data to fulfill all legislative, regulatory, audit, and reporting requirements.

accela.com/asset

Exhibit 6: Embrace the Power of the Civic Platform

11.2 An Enterprise Solution

Yes. The Accela Civic Platform was designed to function across an enterprise level at a given agency serving a myriad of departments with specific applications to suit their individual business needs.

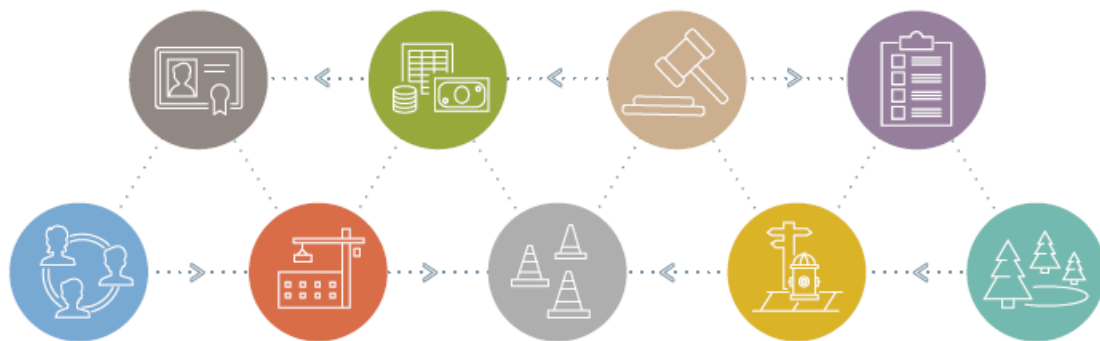


11.3 Unified Service Delivery

Cities, counties and other local government entities can no longer afford to have silos of information and separate systems. Many citizen services require the involvement of multiple departments within an agency or even outside local or state agencies. An increasing number of local development agencies are creating a united service delivery option whereby all involved parties work together in a team fashion to process a development application and subsequent building permits. Such united delivery mechanisms provide the customer with a single place to file their application and a main point of contact rather than shuffling around town from department to department juggling several applications and contacts.

UNIFIED

When software works together, people can do the same



PASS & RECEIVE DATA

Seamless data flow between your departments, users, and products speeds productivity and eliminates duplicate entries.

A COMMON USER INTERFACE

As we integrate our product suite into the Accela family, we're unifying our designs so that your experience will be consistent across all products.

MANAGEMENT DASHBOARDS

Integrated dataflow will also benefit cross-departmental reporting and activity tracking.

While many software providers may claim that any web-based system can be shared amongst internal and external users to achieve this goal, best practices dictate that these external users have limited access rights. Accela long ago recognized the need for development agencies to collaborate with each other in a secure fashion in order to deliver a unified service to their citizens. At the foundation of our Civic Platform is the ability to define internal and outside departments that are associated to a user account and then leverage those

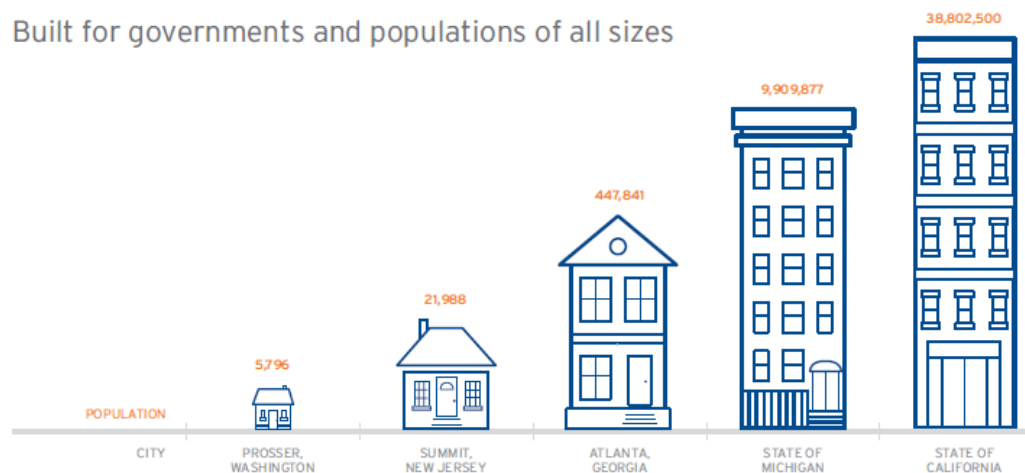
departments for limiting access to what external users can see and modify. In other permitting applications, if a user has rights to update workflow, then that user can update any workflow task for any permit. In addition to workflow security for external users, restrictions can be placed on certain record types in specific statuses, inspections, conditions/holds and attachments for broad security controls throughout the entire system.

11.4 Scalable

The Civic Platform solution is based on open architecture, common best practices and utilizes publicly available technologies. The application layer can scale both vertically (by adding additional processors) and horizontally (by adding additional server hardware) allowing deployment infrastructure that grows to accommodate an agency's requirements. There are no proprietary technologies in the product. This architecture ensures that the complete Accela Civic Platform ecosystem is scalable for easy deployment.

SCALABLE

Built for governments and populations of all sizes



POPULATIONS FROM 1K - 10M+

From small towns to states, Accela solutions are built to meet the needs of communities of all sizes.

STAFFS OF 1 TO 2,000

With an emphasis on usability & templating, workflows are easy to learn yet also feature enhanced routing and collaboration features for large workforces.

FUTUREPROOFED INVESTMENT

Cloud software means frequent, immediate upgrades and has the flexibility to be customized as your needs evolve.

The application server hosts the business logic with a set of reusable business components. This construction offers **multiple integration options** to provide

flexibility and standards-compliant access with a well-defined interface to lower integration costs.

Additionally, the Civic Platform uses an ActiveX control for interfacing with specific cash drawers when a cash drawer is actually used and where it is only required that the PC connected to the cash drawer have the ActiveX control installed.

11.5 Flexible - Complete Configurability of the End User Experience

Adjust the look and feel of any form or list within the product by adding, removing, requiring, resizing and/or renaming any field, whether out of the box or defined by the agency. This can be done by any user with the appropriate role rights and can furthermore be deployed using the “Effective Scope” definition to the appropriate Solution, User Group or individual User. This ensures that users are working in an environment optimized for their daily tasks, showing them the most important information where they need it most.

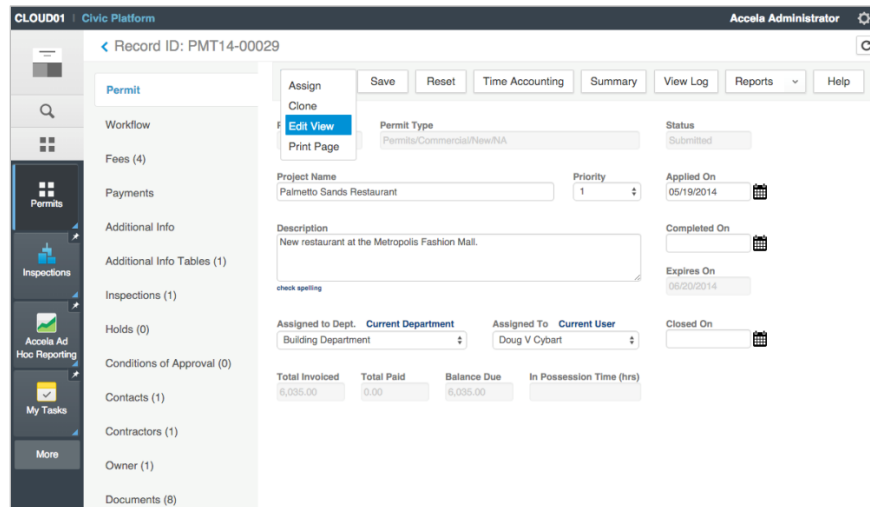


Exhibit 7: Example of the base permit form with the menu option highlighted to enter into edit mode

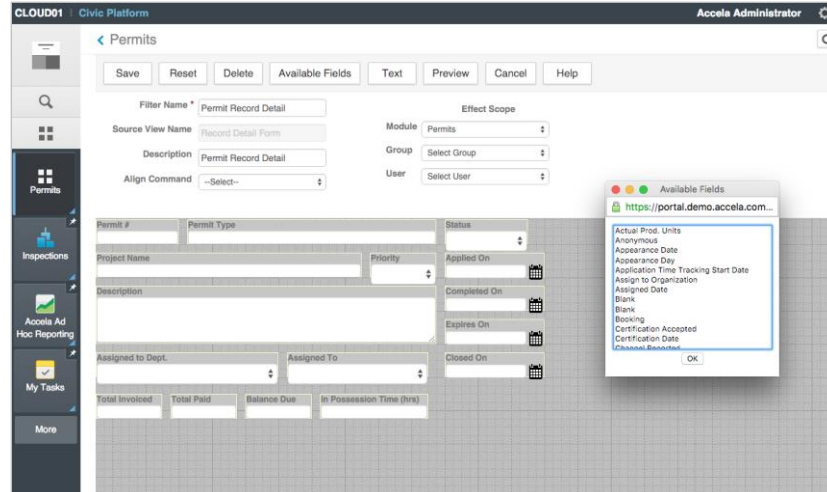


Exhibit 8: Example of the permit form in edit mode

11.6 Mobile Applications on all Major Devices and Platforms

A Mobile Strategy should be a Priority

"The average cost per transaction to provide a service online is \$3.91 compared to \$17.11 to provide the service offline – a difference of \$13.20 per transaction."

*Center for Public Policy
& Administration
University of Utah*

We understand that Agency IT Departments have a wide variety of choices when it comes to mobilizing their workforces including devices ranging from laptops to tablets and smartphones as well as operating systems such as iOS, Android and Windows. As such, we are committed to providing industry leading applications on the big three platforms: Apple (iOS), Google (Android) and Windows (Mobile and Windows OS). Furthermore, our applications are designed to work natively on tablets, smartphones and laptop operating systems leveraging those operating systems. We welcome agencies to try these applications on their chosen mobile devices as all **our mobile applications include a complimentary Preview Mode** that allows users to experience the features and functionality that can help empower their field personnel to deliver a higher level of service to your constituents.

11.7 Powerful Mobile Capabilities

Accela has developed and published mission critical mobile applications including Inspector, and Contractor Central. Agencies will find that there are distinct functionality capabilities unique to Accela when compared to the competition including:

- ➡ Turn-by-turn, voice-navigations utilizing the Inspector's preferred mapping application
- ➡ Support for multiple checklist items and groups of checklist items per Inspection type
- ➡ Ability to associate photos, ad-hoc comments and standard comments directly against the specific checklist item(s) in violation
- ➡ Access to standard comment libraries, favorite comment libraries and a reference to the Inspector's most recently used comments
- ➡ Ability to capture Latitude and Longitude coordinates in the field to update job site locations with greater accuracy while in the field
- ➡ Ability to expose any report from the back-office system to users in the field
- ➡ Full mapping capabilities including the ability to turn on/off GIS layers, select and identify GIS features and create cases against GIS elements outside of just parcels and addresses
- ➡ Native store-and-forward capabilities for intermittent connectivity as well as the ability to download all jobs and related data offline in instances when an Inspector knows they will be working disconnected for longer stretches at a time
- ➡ Ability to capture photos, videos and/or voice memos and relate to the record in the field
- ➡ Ability to update workflow progress and case-attribute data in the field including but not limited to contacts, licensed professionals, property information, custom field information (such as square feet, valuation, the number of rooms, etc.) and the ability to add/remove Locks, Holds, Notices and/or Requirements.

11.8 Customer Friendly Citizen Access with Mobile Browser Support

Accela's Citizen Access offers unprecedented features and functionality that empower agencies to conduct business with the citizens they serve in a 24/7/365 including application submission, research, GIS mapping, fee payment, license renewal, project management and much more. The Citizen Access portal supports non-registered (i.e. public), registered and third-party contributors to work collaboratively with the County. Those with a registered account are welcomed with a personalized dashboard highlighting items that require the user's immediate attention, open invoices, active projects and recent work activity with the County. Citizen Access is also mobile-browser adaptive, ensuring that those customers that access the site from a smartphone or other mobile device are provided with a powerful and intuitive user experience uniquely suited to their device. Citizen Access is also the only permitting and licensing solution that is 508 Compliant, making the software accessible for individuals with physical, sensory or cognitive disabilities. *For more information about 508 compliance and why it is important, visit <http://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-section-508-standards>.*

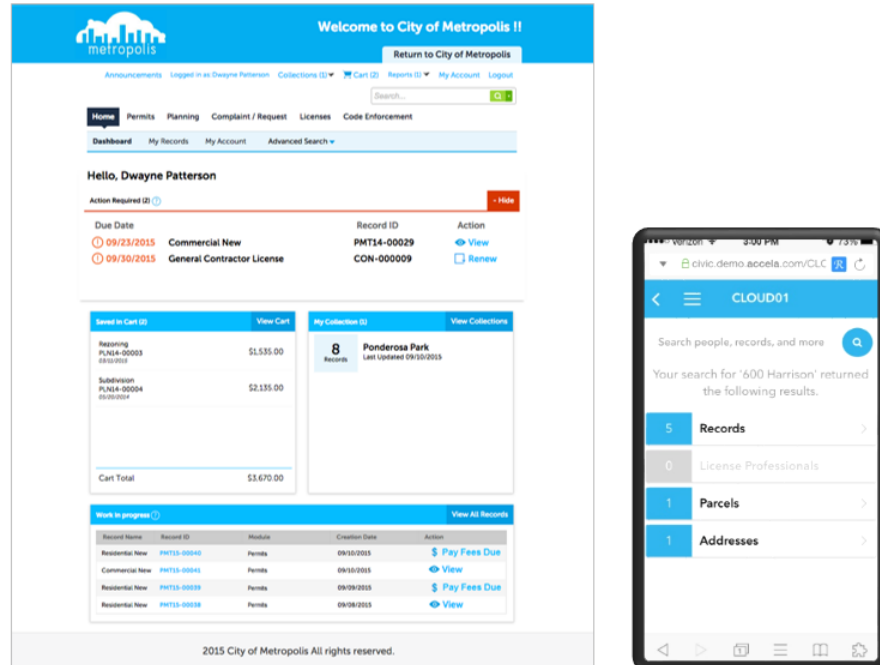


Exhibit 9: Accela Citizen Access and Mobile Browser

11.9 Robust Citizen Access Administration Tools

No longer will agency departments have to rely on IT personnel to change content, capabilities or the look and feel of their business vertical's online presence with the Civic Platform. Accela has built an intuitive set of admin tools for managing these elements, empowering subject matter experts within departments to evolve and keep relevant the content that is made available to the public online. Competitors in the marketplace cannot offer this level of capability and often require that users edit HTML, XML or ASPX pages on the web server to achieve the same behavior that is available in the intuitive Citizen Access Admin tool. Furthermore, Accela supports internationalization with out-of-the-box language packs including Spanish: <https://aca.accela.com/alameda/>.

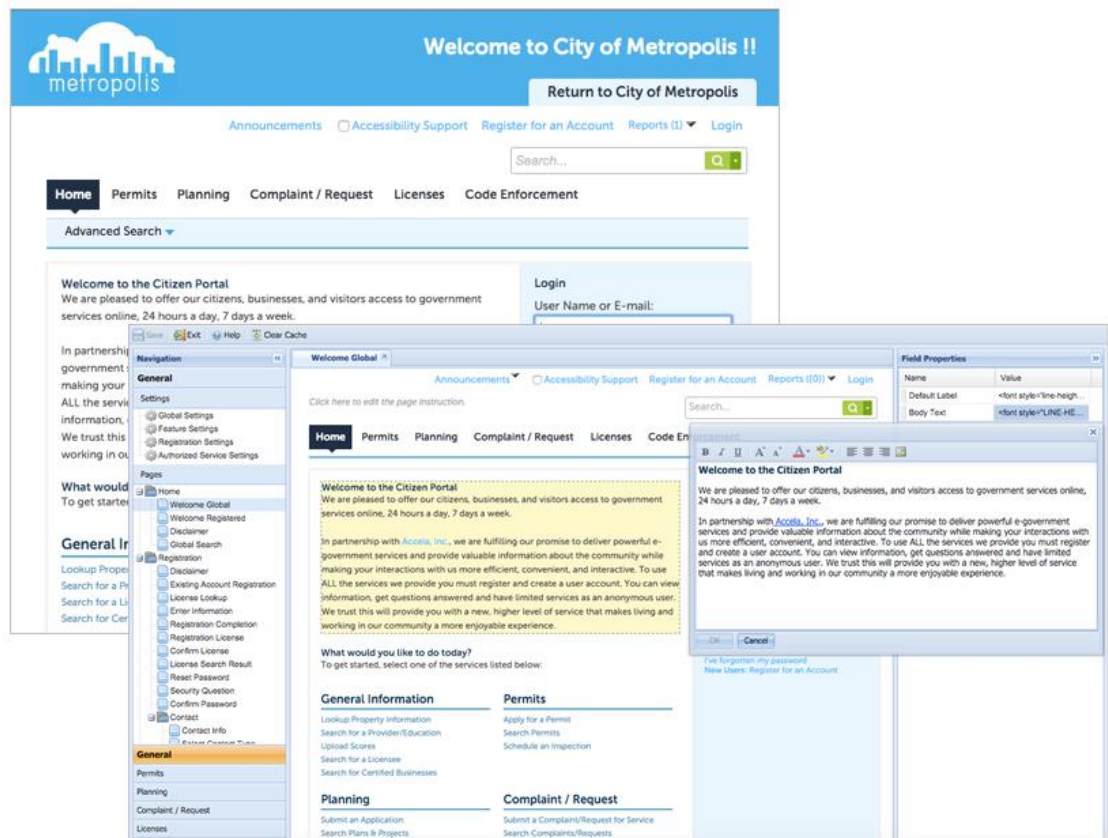
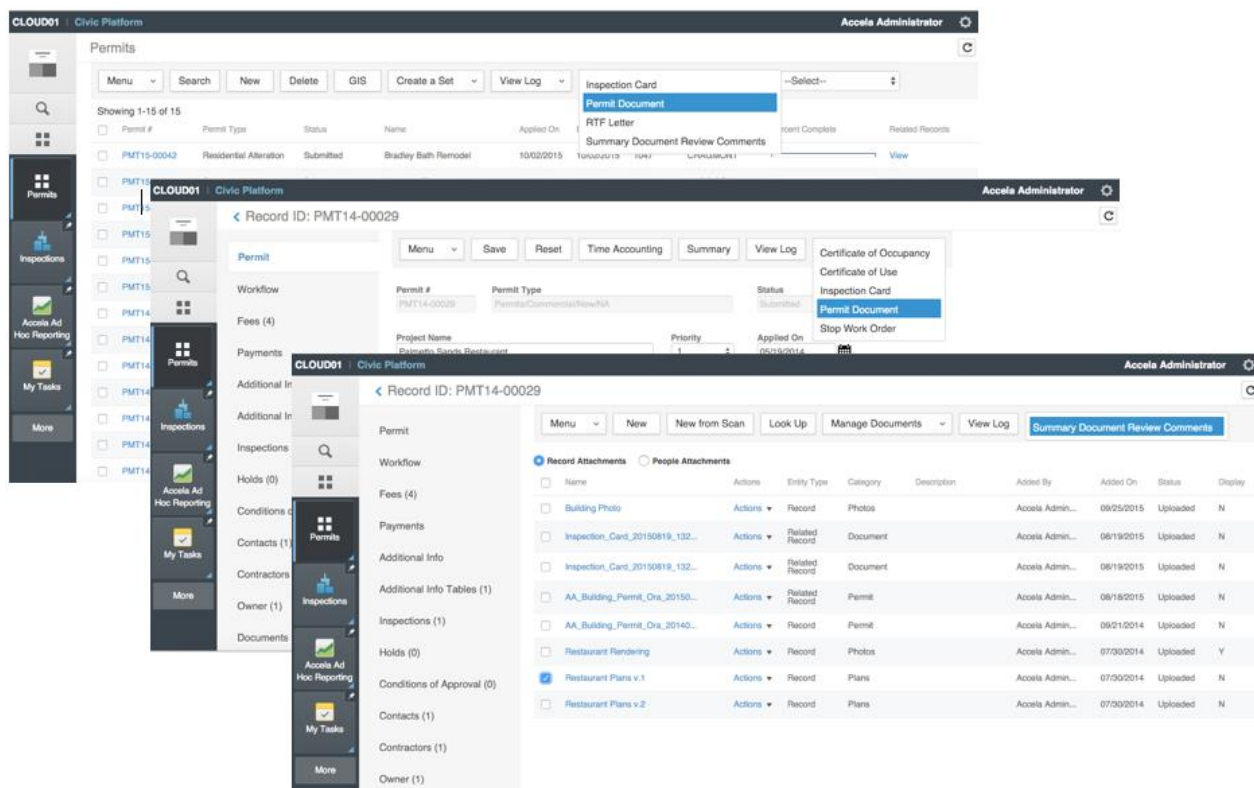


Exhibit 10: Example of the Citizen Access Home Page and the corresponding Portal Administration View

11.10 Reports Where and When You Need Them

Ability to deploy reports virtually anywhere within the system, make them available for execution manually, automatically or only when specific milestones have been met. Restrict who can execute reports based on role level security and/or application status.



The image displays three overlapping screenshots of the Accela Civic Platform interface, demonstrating the deployment of reports within different system components:

- Top Screenshot (Permits List):** Shows a list of permits with columns for Permit #, Permit Type, Status, Name, and Applied On. A dropdown menu is open, showing options like "Inspection Card", "Permit Document", "RTF Letter", and "Summary Document Review Comments".
- Middle Screenshot (Record ID: PMT14-00029):** Shows a detailed view of a permit record. It includes a sidebar with navigation options like "Permits", "Inspections", "Accela Ad Hoc Reporting", and "My Tasks". The main area displays permit details and a dropdown menu with options like "Certificate of Occupancy", "Certificate of Use", "Inspection Card", "Permit Document", and "Stop Work Order".
- Bottom Screenshot (Record ID: PMT14-00029):** Shows a detailed view of a permit record, focusing on the "Record Attachments" section. It lists various attachments such as "Building Photo", "Inspection_Card_20150819_132...", "AA_Building_Permit_Oha_20150...", "Restaurant Rendering", "Restaurant Plans v.1", and "Restaurant Plans v.2".

Exhibit 11: Examples of Reports deployed within a Record List, Permit Form and Permit Documents List

11.11 Support for All Major Report Authoring Tools



In addition to Accela's built in Ad Hoc Report Writer tool, the Civic Platform also supports reports developed in the major report authoring tools on the market including Crystal Reports, Oracle Reports and Sequel Server Reporting Services (SSRS – for on-premise deployments) as well as deploying MS Word documents for mail-merge reporting against data within Accela. These reports can be deployed throughout the application seamlessly and do not require any additional software or services deployment onto client/end user machines.

11.12 Intuitive Workflow Designer

Our Civic Platform includes a robust workflow design tool for milestones, status connectors that allow for linear, concurrent, skip and loopback functions and powerful automation capabilities including calls to GIS, nested workflows, automated status changes and automated email communication. Clean lines, color-coded and icon-based status indicators and an HTML5 responsive design allows your agency to quickly move applications through the unique business processes to take them from intake to approval.

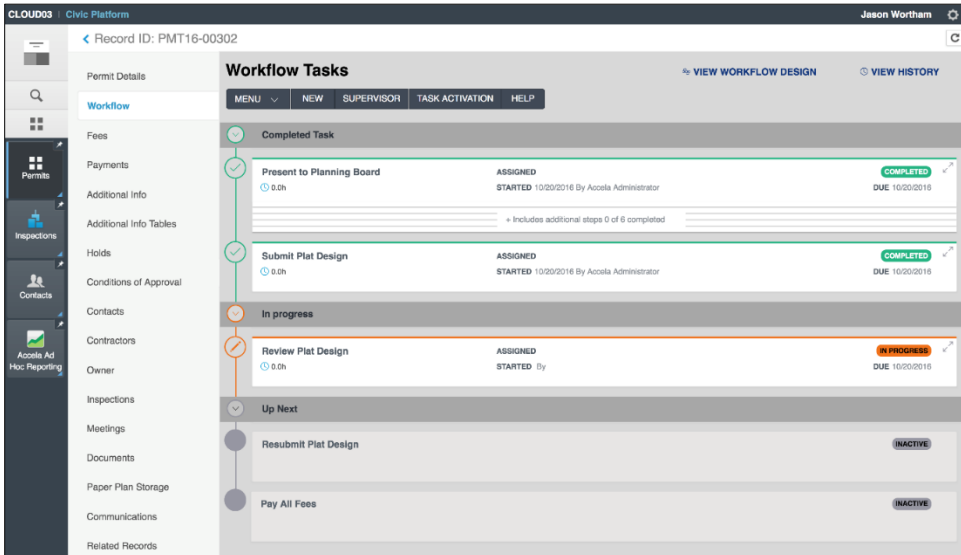


Exhibit 12: Workflow Tasks

(This page intentionally left blank)