

Statement of Work

Prepared For: City of Fort Lauderdale, Florida

Carahsoft Technology & ePermitHub Implementation

Version: 1.1

PermitRocket Software, LLC shall perform the Services (described below) for the City of Fort Lauderdale, FL. to implement the ePermitHub Digital Plan Room components into the Accela Civic Platform. This Carahsoft Technology SOW defines the Services to be provided by PermitRocket Software LLC.

PermitRocket Software, LLC is a Florida technology company working on a cutting edge web-based electronic plan review solution in partnership with Accela, the largest permitting software vendor. This solution, called the Digital Plan Room, is being designed to not only meet requirements of government permitting agencies around the United States, but also specifically meet the unique requirements for agencies within Florida, including full support for securely signed and sealed electronic plans using digital signatures per the following Florida Administrative Code Rules:

- 61G1-16.005 - Board of Architecture and Interior Design Procedures for Signing and Sealing Electronically Transmitted Plans, Specifications, Reports or Other Documents
- 61G15-23.004 - Board of Professional Engineers Procedures for Digitally Signing and Sealing Electronically Transmitted Plans, Specifications, Reports or Other Documents

For this effort, ePermitHub is extending the benefits of its Early Adopter Program to the City of Fort Lauderdale. As an Early Adopter the City may participate in finalizing the design and functionality of the first version of the Digital Plan Room solution, and its subsequent integration with Accela, as described below.

Objective

To complete the implementation of the ePermitHub Digital Plan Room components into the Accela Civic Platform. Upon completion, the Accela Civic Platform will support integrated digital reviews capabilities, including file and sheet versioning, dynamic issue management, 2D electronic markups.

Services

Development of the following milestones:

1. Project kick-off meeting and detailed project plan document.
2. Accela Citizen Access portal to support file versioning and multi-file review submittals that triggers notifications to the agency.
3. Accela Civic Platform to supports digital signatures verification, file versioning, plan review sheet versioning process.
4. Augment Digital Plan Room deployment with 2D markups, dynamic corrections management between back office and customer portal and deliver for start of acceptance testing by the City of Fort Lauderdale.

Detailed Requirements

Detailed requirements as specified below by the City of Fort Lauderdale will be supported by the solution:

1. Ability to process any PDF file regardless of properties or security, except encrypted / password protected PDFs which will be automatically rejected.
2. Versioning of files and review cycle tracking for files, plan sheets and documents.
3. Support for multi-file resubmittals and choice to show or hide old comments.
4. Dynamic correction reports to be supported by new issue management features.
5. Full support for validation of digital signatures, submittal will be blocked before review when signatures are invalid.
6. Equivalent markup tools to the current Accela Electronic Document Review solution.
7. Ability to review multiple files at once.
8. Parallel plan reviews so multiple reviewers can save comments simultaneously
9. Ability to save as every issue is created or auto save.
10. Ability to see all review items in one place.
11. Ability to securely display the comment to customers.
12. Plan comparison overlay of different versions/cycles of the same sheets

Schedule and delivery are contingent on availability and access to City staff resources.

Payment Terms & Delivery Schedule:

Total compensation for the above services is not to exceed \$176,040 all exclusive and will be paid

according to the following payment schedules:

Phase 1: Payment Schedule				
1	Milestone 1	Project Manager - 100 Hours		\$11,500.00
2	Milestone 2	Project Manager - 46 Hours	Consulting Engineer - 204 Hours	\$32,830.00
3	Milestone 3	Project Manager - 46 Hours	Consulting Engineer - 204 Hours	\$32,830.00
4	Milestone 4	Project Manager - 48 Hours	Consulting Engineer - 203 Hours	\$32,925.00
			Total:	\$110,085.00

Service	Hours	Price	Total
Consulting Engineer	611	\$135.00	\$82,485.00
Project Manager	240	\$115.00	\$27,600.00

Continuous Phase: Payment Schedule				
1	Milestone 1		Consulting Engineer - 112 hours	\$15,120.00
2	Milestone 2	Project Manager - 100 Hours	Consulting Engineer - 64 Hours	\$20,140.00
3	Milestone 3	Project Manager - 88 Hours		\$10,120.00
4	Milestone 4	Project Manager - 35 Hours	Consulting Engineer - 40 Hours	\$9,425.00
5	Milestone 5	Project Manager - 50 Hours	Consulting Engineer - 40 Hours	\$11,150.00
			Total (not to exceed):	\$65,955.00

Service	Hours	Price	Total
Consulting Engineer	256	\$135.00	\$34,560.00
Project Manager	273	\$115.00	\$31,395.00

Carahsoft Technology Corp. will submit an invoice to the City of Fort Lauderdale, FL upon completion of each milestone and will be paid in accordance with Carahsoft Technology Net 45 payment terms. Milestone timelines are contingent upon timely compensation.

Acceptance

Accepted By: City of Fort Lauderdale, FL	Accepted By: Carahsoft Technology Corp.
Print Name:	Print Name:
Title:	Title:
Date:	Date:

APPENDIX A: EPERMITHUB EARLY ADOPTER DIGITAL PLAN ROOM PROJECT PLAN DRAFT

1. PROJECT DEFINITION

PROBLEM STATEMENT

The City of Fort Lauderdale currently employs a paper based plan review process. Paper based plan review has many challenges, but the main issues being faced by the City are slow review speeds, inability to do parallel reviews and an inefficient collaborative environment among all stakeholders. Ultimately, this reflects on the quality of customer service that can be offered to the community. Additionally, the City of Fort Lauderdale will face increasing pressure to modernize their operational efficiency because of the construction industry, which is rapidly adopting advanced technologies, such as Building Information Model (BIM), Augmented Reality (AR), Virtual Reality (VR) and mobile construction software, to conduct their business of creating our Built World. This technology shift is pressuring government regulatory bodies to adopt more modern and efficient plan review processes, and related electronic plan review tools across the country.

PROJECT SCOPE

The objective of this project is to complete the implementation of the ePermitHub Digital Plan Room components into the Accela Civic Platform Land Management System. At a high level, the Digital Plan Room deployment will support integrated digital reviews capabilities, including file and sheet versioning, dynamic issue management and 2D electronic markups. The Digital Plan Room solution will provide for an embedded plan review solution with the Accela permitting system and will be fully integrated into the Accela Civic Platform workflow.

PROJECT STRATEGY

The project will be conducted in an iterative manner to allow for the City to provide feedback every step of the way. Feedback on specific features and topics will be requested from city staff throughout the project as needed. Additionally, upon completion of each iteration or milestone, there will be a formal feedback session with a set of predetermined stakeholders. Agreed items from feedback sessions will be incorporated into the product as schedules permit.

It is also the intent to incorporate feedback from the City's customers. The City will predetermine an appropriate set of their customers that would influence the project in a positive way. A focus group will be formed and introduced into some of the feedback meetings as detailed later in this document.

DELIVERABLES

The entire project will be divided into four Phases with their respective deliverables and actions by all stakeholders. The Continuous Phase and Phase 1 are priced in the Early Adopter SOW. Phases 2 & 3 are included in the Early Adopter Program SOW at no additional cost. A summary is provided below. For more detail see the Project Implementation section of this document.

1. Continuous Phase: Mirror Implementation Strategy
 - Throughout the life cycle of the project, the team will create, configure and maintain a mirrored Accela Civic Platform environment that will be used in Phases 1 through 3 and migrated to the formal City environment for Go Live.
2. Phase 1: Development Phase
 - Deliver test environment on mirror Accela Civic Platform System that supports plan submission, digital signatures, file versioning, sheet/document versioning, review assignments, issue/markup tracking and management.
3. Phase 2: Acceptance / Feedback Phase
 - Conduct iterative user acceptance testing, feedback sessions and updates/enhancements to the test environment as agreed by reduced stakeholder's group.
4. Phase 3: Pilot / Focus Group / Learning Phase
 - Conduct focus group with City's selected customers. Start Pilot with selected customers. Execute pilot until migration to formal City test environment is complete.

SUCCESS CRITERIA

The definition of project success is critical to the end of defining appropriate expectations from the start of a project. Success is defined for each phase of the project so that the team can measure as it iterates towards the final goal as follows:

- Continuous Phase: Full migration to Accela Civic Platform completed and EDR open to all customers.
- Phase 1: Standalone test deployment delivered with incorporated feedback, ready to start acceptance testing.
- Phase 2: Acceptance feedback sessions conducted, feedback incorporated and pilot deployment delivered ready to start pilot phase.
- Phase 3: Pilot EDR projects successfully conducted with selected Fort Lauderdale customers.

2. PROJECT IMPLEMENTATION

IMPLEMENTATION OVERVIEW

This section describes the implementation tasks and work needed to complete the project. The project is divided into four distinct phases to help create a framework for the different activities that will take place at each stage.

CONTINUOUS PHASE: ACCELA CIVIC PLATFORM MIRROR IMPLEMENTATION

This Phase will start at the beginning of the project and will run parallel to Phases 1 - 3. In this phase, an Accela Civic Platform environment will be created with the exact copy configuration obtained from the ongoing Accela project. This environment will be used to conduct Phases 1 - 3 without affecting the ongoing Accela implementation project. The goal is to keep the mirror environment frequently updated with Accela configuration from the ongoing Accela project so that the ePermitHub implementation in the mirror environment is as close to the official Accela environment as possible.

After the end of Phase 3, this phase will continue to provide for migration to the official Accela environment, training and go live. At this time the mirror ePermitHub implementation will be copied to

the official Accela test environment and final acceptance testing will be completed to address any issues that might arise from migrating from the mirror environment to the official test environment. Since the two environments will be maintained as very close mirrors and extensive testing will have been done in the mirror environment, this testing effort should be very short, just to “sanity check”. Specific training requirements that were determined during Phase 3 will be executed at this time as well. The ePermitHub Digital Plan Room solution will be rolled out for go live as the final milestone of the Continuous Phase.

PHASE 1: DEVELOPMENT PHASE

The goal of this phase is to create an Accela Civic Platform mirror deployment that City staff can start using as a test bed for acceptance and feedback. During this phase the main features of the digital plan room deployment will be implemented into a preconfigured Accela mirror with the exact copy of Fort Lauderdale’s workflow. Each milestone in this phase defines a subset of features to be implemented. Feedback during the milestone implementation will be on demand, as needed. At the end of each milestone, there will be a formal feedback session where the City participants are presented with a demo of the particular features in question with the purpose of obtaining feedback and discovering usability problems in the features implemented. Any agreed to solutions, which are part of this SOW will be delivered by the end of the project.

PHASE 2: ACCEPTANCE / FEEDBACK TESTING PHASE

In this phase the mirror test deployment will grow into a fully functioning electronic plan review deployment as guided by City staff feedback and input. The City participants will be given full access to the deployment created in the previous phase and will conduct “test” electronic plan review workflows using sample data and plans and a mirror copy of the most recent Accela Workflow configuration. In this phase, the team will try to simulate as many real life conditions and project types as possible to learn and understand the capabilities of the workflow as designed. The test bed will be monitored remotely by the development and support team to assess and correct any errors, performance problems and other issues. Informal feedback sessions will be conducted as needed and formal feedback sessions will be conducted every two weeks until both City staff and development team are satisfied that the solution is performing to agreed requirements.

PHASE 3: PILOT PHASE

During the pilot phase, City staff will start using the Accela mirror deployment that was thoroughly

tested in the previous phase to conduct electronic plan review for real projects. However, this is also a learning phase where the City will learn how to scale their electronic plan review operations by starting with a small controlled pilot and opening it up to a selected list of customers that represent their most progressive set and will add value to the learning process. To this end, the first milestone of this phase will be to conduct a focus group to determine and inform the initial set of customers that will participate in the pilot as well as to obtain feedback on their needs and requirements. After that, the City will start conducting a fixed set of plan review projects electronically with the set of selected customers from the focus group.

During this period, the City will learn and adapt their processes to scale while at the same time providing feedback to the development team on issues that arise while doing reviews at a larger scale. The team will also learn in this phase what the training and support requirements are involved in running electronic plan review operations across all departments. Training materials and required training sessions will be created based on the learning acquired during this phase to be executed during PHASE 4. The City will not open the mirror Accela environment to customer base, but only privately invite selected members from the focus group and use it as a learning vehicle to move from paper based processes into electronic plan review. Once the entire team has reached consensus and there is enough confidence in the solution the entire configuration will be copied into the official City Accela test environment to start final testing in preparation for Go Live. This approach will allow for the City to make rapid progress on the Electronic Plan Review project without adding any risk to the larger Accela Civic Platform implementation.

Project Timeline Summary table

Phase	Duration	Participants	Description
Phase 1	6 months	2 – 4 city staff	Development
Phase 1 – Milestone 1	2 weeks	2 – 4 city staff	Project Plan / kickoff
Phase 1 – Milestone 2	2 months	2 – 4 city staff	Plan submission / digital signature/ file versioning
Phase 1 – Milestone 3	2 months	2 – 4 city staff	Review assignments / sheet and doc versioning / sheet filtering
Phase 1 – Milestone 4	2 months	2 – 4 city staff	Issue / markup creation and management

Phase 2	2-3 months	2 – 8 city staff	Acceptance / Feedback
Phase 2 – Milestone 1	4 weeks	2 – 8 city staff	Testing and feedback session 1
Phase 2 – Milestone 2	4 weeks	2 – 8 city staff	Testing and feedback session 2
Phase 3	9 weeks		Pilot / Learning / Focus Group
Phase 3 – Milestone 1	1 week	>8 City Staff + 4 selected customers	Focus group meeting / demo / feedback session
Phase 3 – Milestone 2	2 months	>8 City Staff + 4 selected customers	Start pilot with “4” number of projects.
Continuous Phase	11 - 13 months	Start at beginning of Phase 1	Accela Civic Platform Mirror Implementation
Milestone 1	2 weeks	Accela + IT	Accela team will create Civic Platform mirror environment with most recent configuration
Milestone 2	On going	Accela + IT	Maintain mirror environment in sync with Accela project configuration
Milestone 3	2 weeks	Accela	At end of Phase 3: Copy ePermitHub components from mirror to official Accela test environment
Milestone 4	1 month	City Staff	Conduct final acceptance testing on official Accela environment.
Milestone 5	1 month	Accela + IT	Training and go live on Accela

3. Assumptions

1. The City of Fort Lauderdale expects active collaboration in terms of planning, coordination, and execution between the ePermitHub team and the Accela delivery team for the City
2. The execution of this and future ePermitHub work shall not dictate nor delay the Accela Go-Live date

4. Risk and Issue Management

The PermitRocket team will:

- Develop a Risk and Issues Management plan, which will be included in the final Project Plan
- Develop and maintain the Risk and Issues Management tracker
- Work with the City of Fort Lauderdale in order to resolve or mitigate risks or issues with the objective of not compromising project milestones
- Escalate Risk and Issues when necessary to the appropriate City or Accela team leadership.

Appendix B:

ePermitHub Digital Plan Room Roadmap for Future Versions

- Ability to hyperlink to sheets from any text field
- Ability for staff to approve plans with digital signatures.
- Ability for Plan Reviewers to collaborate around issues internally before anything is shown to the AE. An example is integrating issues to Accela tasks, so issue related tasks can be assigned to other plan reviewers.
- Access to plans and 3D models from mobile device
- Additional markup tools:
 - Fill polygons, hatch patterns
 - Continuous measuring and area display on polygons
- Add an issue status that indicates that particular status is ONLY for internal review
- Administrative dashboard that displays aggregates of plan review summary for each record. In addition, provide aggregate totals by date range, and for each trade/discipline/agency
- Agency Plan Reviewer is able to “patch” an existing cycle without having to re-start another cycle (i.e., If there is a small change required, they want the AE to be able to send a corrected or new document and then the plan reviewer “patches” it to the existing cycle.
- Automatic hyperlinking of reference bubbles
- Comprehensive comparison
 - Want ability to compare existing building plans to the renovation plans for the same building

- Want to compare two version of different sheets (i.e., comparing different disciplines of same sheet)
- Want to compare external docs not a part of the submittal to plan related docs submitted (i.e., Have a historical reference doc of same existing building and want ability to compare that reference plan against the submitted plan for that building).
- Internal comment/activity feed on each issue for the plan review staff to collaborate and see the history of the issue. (i.e., like a Twitter or Facebook activity feed, but for plan review issues)
- Live review support
- Markup plans on the live review session
- 3D models review support.