

## CITY OF MENIFEE

### PROFESSIONAL SERVICES AGREEMENT

#### CITY OF MENIFEE ACCELA CONFIGURATION CONSULTING SERVICES

THIS PROFESSIONAL SERVICES AGREEMENT ("Agreement") is made and effective this 17<sup>th</sup> day of October, 2018 ("Effective Date") by and between the CITY OF MENIFEE, a California municipal corporation, ("City") and **IK CONSULTING, LLC**, a Limited Liability Company (LLC) ("Consultant"). City and Consultant may sometimes herein be referred to individually as a "Party" and collectively as the "Parties."

#### SECTION 1. SERVICES.

Subject to the terms and conditions set forth in this Agreement, Consultant shall provide to City the services described in the Scope of Services, attached hereto as Exhibit A and incorporated herein by this reference (the "Services"). Consultant will perform subsequent task orders as requested by the Contract Administrator (as defined below), in accordance with the Scope of Services. In the event of a conflict in or inconsistency between the terms of this Agreement and Exhibit A, this Agreement shall prevail.

1.1 Term of Services. The term of this Agreement shall begin on **October 17, 2018** and shall end on **April 30, 2020** unless the term of this Agreement is otherwise terminated or extended as provided for in Section 8. The time provided to Consultant to complete the Services required by this Agreement shall not affect City's right to terminate this Agreement, as provided for in Section 8.

1.2 Standard of Performance. Consultant represents and warrants that Consultant is a provider of first class work and services and Consultant is experienced in performing the Services contemplated herein and, in light of such status and experience, Consultant shall perform the Services required pursuant to this Agreement in the manner and according to the standards observed by a competent practitioner of the profession in which Consultant is engaged in the geographical area in which Consultant practices its profession and to the sole satisfaction of the Contract Administrator.

1.3 Assignment of Personnel. Consultant shall assign only competent personnel to perform the Services pursuant to Agreement. In the event that City, in its sole discretion, at any time during the term of this Agreement, desires the reassignment of any such persons, Consultant shall, immediately upon receiving notice from City of such desire of City, reassign such person or persons.

1.4 Time. Consultant shall devote such time to the performance of the Services pursuant to this Agreement as may be reasonably necessary to satisfy Consultant's obligations hereunder.

1.5 Authorization to Perform Services. Consultant is not authorized to perform any of the Services or incur any costs whatsoever under the terms of this Agreement until receipt of authorization from the Contract Administrator.

## SECTION 2. COMPENSATION.

City hereby agrees to pay Consultant a sum not to exceed **ONE HUNDRED NINETY NINE THOUSAND THREE HUNDRED FORTY FIVE DOLLARS AND ZERO CENTS (\$199,345.00)** notwithstanding any contrary indications that may be contained in Consultant's proposal, for the Services to be performed and reimbursable costs incurred under this Agreement. In the event of a conflict between this Agreement and Exhibit A, regarding the amount of compensation, this Agreement shall prevail. City shall pay Consultant for the Services rendered pursuant to this Agreement at the time and in the manner set forth herein. The payments specified below shall be the only payments from City to Consultant for the Services rendered pursuant to this Agreement. Consultant shall submit all invoices to City in the manner specified herein. Except as specifically authorized in advance by City, Consultant shall not bill City for duplicate services performed by more than one person.

2.1 Invoices. Consultant shall submit invoices monthly during the term of this Agreement, based on the cost for the Services performed and reimbursable costs incurred prior to the invoice date. Invoices shall contain the following information:

- a. Serial identifications of progress bills; i.e., Progress Bill No. 1 for the first invoice, etc.;
- b. The beginning and ending dates of the billing period;
- c. A "Task Summary" containing the original contract amount, the amount of prior billings, the total due this period, the balance available under this Agreement, and the percentage of completion;
- d. At City's option, for each item in each task, a copy of the applicable time entries or time sheets shall be submitted showing the name of the person performing the Services, the hours spent by each person, a brief description of the Services, and each reimbursable expense;
- e. The total number of hours of work performed under this Agreement by Consultant and each employee, agent, and subcontractor of Consultant performing the Services hereunder necessary to complete the Services described in Exhibit A;
- f. Receipts for expenses to be reimbursed;
- g. The Consultant Representative's signature.

Invoices shall be submitted to:

City of Menifee  
Attn: Accounts Payable  
29714 Haun Road  
Menifee, CA 92586



2.2 Monthly Payment. City shall make monthly payments, based on invoices received, for the Services satisfactorily performed, and for authorized reimbursable costs incurred. City shall have thirty (30) days from the receipt of an invoice that complies with all of the requirements above to pay Consultant.

2.3 Final Payment. City shall pay the last five percent (5%) of the total amount due pursuant to this Agreement within sixty (60) days after completion of the Services and submittal to City of a final invoice, if all of the Services required have been satisfactorily performed.

2.4 Total Payment. City shall not pay any additional sum for any expense or cost whatsoever incurred by Consultant in rendering the Services pursuant to this Agreement. City shall make no payment for any extra, further, or additional service pursuant to this Agreement.

In no event shall Consultant submit any invoice for an amount in excess of the maximum amount of compensation provided above either for a task or for the entirety of the Services performed pursuant to this Agreement, unless this Agreement is modified in writing prior to the submission of such an invoice.

2.5 Hourly Fees. Fees for the Services performed by Consultant on an hourly basis shall not exceed the amounts shown on the fee schedule included with Exhibit A.

2.6 Reimbursable Expenses. Reimbursable expenses are included within the maximum amount of this Agreement.

2.7 Payment of Taxes. Consultant is solely responsible for the payment of employment taxes incurred under this Agreement and any federal or state taxes.

2.8 Payment upon Termination. In the event that City or Consultant terminates this Agreement pursuant to Section 8, City shall compensate Consultant for all outstanding costs and reimbursable expenses incurred for Services satisfactorily completed and for reimbursable expenses as of the date of written notice of termination. Consultant shall maintain adequate logs and timesheets in order to verify costs and reimbursable expenses incurred to that date.

### **SECTION 3. FACILITIES AND EQUIPMENT.**

Except as otherwise provided, Consultant shall, at its sole cost and expense, provide all facilities and equipment necessary to perform the services required by this Agreement. City shall make available to Consultant only physical facilities such as desks, filing cabinets, and conference space, as may be reasonably necessary for Consultant's use while consulting with City employees and reviewing records and the information in possession of City. The location, quantity, and time of furnishing those facilities shall be in the sole discretion of City. In no event shall City be required to furnish any facility that may involve incurring any direct expense, including but not limited to computer, long-distance telephone or other communication charges, vehicles, and reproduction facilities.



## SECTION 4. INSURANCE REQUIREMENTS.

Before beginning any work under this Agreement, Consultant, at its own cost and expense, shall procure the types and amounts of insurance checked below and provide Certificates of Insurance, indicating that Consultant has obtained or currently maintains insurance that meets the requirements of this section and which is satisfactory, in all respects, to City. Consultant shall maintain the insurance policies required by this section throughout the term of this Agreement. The cost of such insurance shall be included in Consultant's compensation. Consultant shall not allow any subcontractor, consultant or other agent to commence work on any subcontract until Consultant has obtained all insurance required herein for the subcontractor(s) and provided evidence thereof to City. Verification of the required insurance shall be submitted and made part of this Agreement prior to execution. Consultant acknowledges the insurance policy must cover inter-insured suits between City and other Insureds.

4.1 Workers' Compensation. Consultant shall, at its sole cost and expense, maintain Statutory Workers' Compensation Insurance and Employer's Liability Insurance for any and all persons employed directly or indirectly by Consultant pursuant to the provisions of the California Labor Code. Statutory Workers' Compensation Insurance and Employer's Liability Insurance shall be provided with limits of not less than ONE MILLION DOLLARS (\$1,000,000.00) per accident, ONE MILLION DOLLARS (\$1,000,000.00) disease per employee, and ONE MILLION DOLLARS (\$1,000,000.00) disease per policy. In the alternative, Consultant may rely on a self-insurance program to meet those requirements, but only if the program of self-insurance complies fully with the provisions of the California Labor Code. Determination of whether a self-insurance program meets the standards of the California Labor Code shall be solely in the discretion of the Contract Administrator. The insurer, if insurance is provided, or Consultant, if a program of self-insurance is provided, shall waive all rights of subrogation against City and its officers, officials, employees, and authorized volunteers for loss arising from the Services performed under this Agreement.

### 4.2 Commercial General and Automobile Liability Insurance.

a. General requirements. Consultant, at its own cost and expense, shall maintain commercial general and automobile liability insurance for the term of this Agreement in an amount not less than ONE MILLION DOLLARS (\$1,000,000.00) per occurrence, combined single limit coverage, for risks associated with the Services contemplated by this Agreement, TWO MILLION DOLLARS (\$2,000,000.00) general aggregate, and TWO MILLION DOLLARS (\$2,000,000.00) products/completed operations aggregate. If a Commercial General Liability Insurance or an Automobile Liability Insurance form or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to the Services to be performed under this Agreement or the general aggregate limit shall be at least twice the required occurrence limit. Such coverage shall include but shall not be limited to, protection against claims arising from bodily and personal injury, including death resulting therefrom, and damage to property resulting from the Services contemplated under this Agreement, including the use of hired, owned, and non-owned automobiles.

b. Minimum scope of coverage. Commercial general coverage shall be at least as broad as Insurance Services Office Commercial General Liability occurrence form CG 0001.



Automobile coverage shall be at least as broad as Insurance Services Office Automobile Liability form CA 0001 Code 2, 8, and 9. No endorsement shall be attached limiting the coverage.

c. Additional requirements. Each of the following shall be included in the insurance coverage or added as a certified endorsement to the policy:

a. The insurance shall cover on an occurrence or an accident basis, and not on a claims-made basis.

b. Any failure of Consultant to comply with reporting provisions of the policy shall not affect coverage provided to City and its officers, employees, agents, and volunteers.

#### 4.3 Professional Liability Insurance.

a. General requirements. Consultant, at its own cost and expense, shall maintain for the period covered by this Agreement professional liability insurance for licensed professionals performing the Services pursuant to this Agreement in an amount not less than ONE MILLION DOLLARS (\$1,000,000) covering the licensed professionals' errors and omissions. Any deductible or self-insured retention shall be shown on the Certificate. If the deductible or self-insured retention exceeds TWENTY-FIVE THOUSAND DOLLARS (\$25,000), it must be approved by City.

b. Claims-made limitations. The following provisions shall apply if the professional liability coverage is written on a claims-made form:

a. The retroactive date of the policy must be shown and must be no later than the commencement of the Services.

b. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after the expiration or termination of this Agreement or completion of the Services, so long as commercially available at reasonable rates.

c. If coverage is canceled or not renewed and it is not replaced with another claims-made policy form with a retroactive date that precedes the Effective Date of this Agreement, Consultant must provide extended reporting coverage for a minimum of five (5) years after the expiration or termination of this Agreement or the completion of the Services. Such continuation coverage may be provided by one of the following: (1) renewal of the existing policy; (2) an extended reporting period endorsement; or (3) replacement insurance with a retroactive date no later than the commencement of the Services under this Agreement. City shall have the right to exercise, at Consultant's sole cost and expense, any extended reporting provisions of the policy, if Consultant cancels or does not renew the coverage.

d. A copy of the claim reporting requirements must be submitted to City prior to the commencement of the Services under this Agreement.

#### 4.4 All Policies Requirements.

a. Acceptability of insurers. All insurance required by this Section is to be placed with insurers with a Bests' rating of no less than A:VII and admitted in California.

b. Verification of coverage. Prior to beginning the Services under this Agreement, Consultant shall furnish City with Certificates of Insurance, additional insured endorsement or policy language granting additional insured status complete certified copies of all policies, including complete certified copies of all endorsements. All copies of policies and certified endorsements shall show the signature of a person authorized by that insurer to bind coverage on its behalf. The Certificate of Insurance must include the following reference: **CITY OF MENIFEE ACCELA CONFIGURATION CONSULTING SERVICES.** The name and address for Additional Insured endorsements, Certificates of Insurance and Notice of Cancellation is: City of Menifee, 29714 Haun Road, Menifee, CA 92586. City must be endorsed as an additional insured for liability arising out of ongoing and completed operations by or on behalf of Consultant.

c. Notice of Reduction in or Cancellation of Coverage. Consultant shall provide written notice to City within ten (10) working days if: (1) any of the required insurance policies is terminated; (2) the limits of any of the required policies are reduced; or (3) the deductible or self insured retention is increased.

d. Additional insured; primary insurance. City and its officers, employees, agents, and authorized volunteers shall be covered as additional insureds with respect to each of the following: liability arising out of the Services performed by or on behalf of Consultant, including the insured's general supervision of Consultant; products and completed operations of Consultant, as applicable; premises owned, occupied, or used by Consultant; and automobiles owned, leased, or used by Consultant in the course of providing the Services pursuant to this Agreement. The coverage shall contain no special limitations on the scope of protection afforded to City or its officers, employees, agents, or authorized volunteers. The insurance provided to City as an additional insured must apply on a primary and non-contributory basis with respect to any insurance or self-insurance program maintained by City. Additional insured status shall continue for one (1) year after the expiration or termination of this Agreement or completion of the Services.

A certified endorsement must be attached to all policies stating that coverage is primary insurance with respect to City and its officers, officials, employees, and volunteers, and that no insurance or self-insurance maintained by City shall be called upon to contribute to a loss under the coverage.

e. Deductibles and Self-insured Retentions. Consultant shall obtain the written approval of City for the self-insured retentions and deductibles before beginning any of the Services.

During the term of this Agreement, only upon the prior express written authorization of the Contract Administrator, Consultant may increase such deductibles or self-insured retentions with respect to City, its officers, employees, agents, and volunteers. The Contract Administrator may condition approval of an increase in deductible or self-insured



retention levels with a requirement that Consultant procure a bond guaranteeing payment of losses and related investigations, claim administration, and defense expenses that is satisfactory in all respects to each of them.

f. Subcontractors. Consultant shall include all subcontractors as insureds under its policies or shall furnish separate certificates and certified endorsements for each subcontractor. All coverages for subcontractors shall be subject to all of the requirements stated herein.

g. Variation. The Contract Administrator may, but is not required to, approve in writing a variation in the foregoing insurance requirements, upon a determination that the coverage, scope, limits, and forms of such insurance are either not commercially available, or that City's interests are otherwise fully protected.

4.5 Remedies. In addition to any other remedies at law or equity City may have if Consultant fails to provide or maintain any insurance policies or policy endorsements to the extent and within the time herein required, City may, at its sole option, exercise any of the following remedies, which are alternatives to other remedies City may have and are not the exclusive remedy for Consultant's breach:

- a. Obtain such insurance and deduct and retain the amount of the premiums for such insurance from any sums due under this Agreement;
- b. Order Consultant to stop work under this Agreement or withhold any payment that becomes due to Consultant hereunder, or both stop work and withhold any payment, until Consultant demonstrates compliance with the requirements hereof; and/or
- c. Terminate this Agreement.

## **SECTION 5. INDEMNIFICATION.**

5.1 Indemnification for Professional Liability. Where the law establishes a professional standard of care for performance of the Services, to the fullest extent permitted by law, Consultant shall indemnify, protect, defend (with counsel selected by City), and hold harmless City and any and all of its officers, employees, officials, volunteers, and agents from and against any and all claims, losses, costs, damages, expenses, liabilities, liens, actions, causes of action (whether in tort, contract, under statute, at law, in equity, or otherwise) charges, awards, assessments, fines, or penalties of any kind (including reasonable consultant and expert fees and expenses of investigation, costs of whatever kind and nature and, if Consultant fails to provide a defense for City, the legal costs of counsel retained by City) and any judgment (collectively, "Claims") to the extent same are caused in whole or in part by any negligent or wrongful act, error, or omission of Consultant, its officers, agents, employees, or subcontractors (or any entity or individual that Consultant shall bear the legal liability thereof) in the performance of professional services under this Agreement.

5.2 Indemnification for Other than Professional Liability. Other than in the performance of professional services and to the full extent permitted by law, Consultant shall indemnify, protect, defend (with counsel selected by City), and hold harmless City, and any and



all of its officers, employees, officials, volunteers, and agents from and against any and all Claims, where the same arise out of, are a consequence of, or are in any way attributable to, in whole or in part, the performance of this Agreement by Consultant or by any individual or entity for which Consultant is legally liable, including but not limited to officers, agents, employees or subcontractors of Consultant.

5.3 Limitation of Indemnification. The provisions of this Section 5 do not apply to claims occurring as a result of City's sole or active negligence. The provisions of this Section 5 shall not release City from liability arising from gross negligence or willful acts or omissions of City or any and all of its officers, officials, employees, and agents acting in an official capacity.

## **SECTION 6. STATUS OF CONSULTANT.**

6.1 Independent Contractor. At all times during the term of this Agreement, Consultant shall be an independent contractor and shall not be an employee of City. City shall have the right to control Consultant only insofar as the results of the Services rendered pursuant to this Agreement and assignment of personnel pursuant to Subparagraph 1.3; however, otherwise City shall not have the right to control the means by which Consultant accomplishes the Services rendered pursuant to this Agreement. The personnel performing the Services under this Agreement on behalf of Consultant shall at all times be under Consultant's exclusive direction and control. Consultant shall not at any time or in any manner represent that it or any of its officers, employees, or agents is in any manner officers, officials, employees, or agents of City. Consultant shall not incur or have the power to incur any debt, obligation, or liability whatever against City, or bind City in any manner. Except for the fees paid to Consultant as provided in this Agreement, City shall not pay salaries, wages, or other compensation to Consultant for performing the Services hereunder for City. City shall not be liable for compensation or indemnification to Consultant for injury or sickness arising out of performing the Services hereunder. Notwithstanding any other City, state, or federal policy, rule, regulation, law, or ordinance to the contrary, Consultant and any of its employees, agents, and subcontractors providing services under this Agreement shall not qualify for or become entitled to any compensation, benefit, or any incident of employment by City, including but not limited to eligibility to enroll in the California Public Employees Retirement System ("PERS") as an employee of City and entitlement to any contribution to be paid by City for employer contributions and/or employee contributions for PERS benefits.

## **SECTION 7. LEGAL REQUIREMENTS.**

7.1 Governing Law. The laws of the State of California shall govern this Agreement.

7.2 Compliance with Applicable Laws. Consultant and any subcontractor shall comply with all applicable local, state, and federal laws and regulations applicable to the performance of the work hereunder. Consultant shall not hire or employ any person to perform work within City or allow any person to perform the Services required under this Agreement unless such person is properly documented and legally entitled to be employed within the United States. Any and all work subject to prevailing wages, as determined by the Director of Industrial Relations of the State of California, will be the minimum paid to all laborers, including Consultant's employee and subcontractors. It is understood that it is the responsibility of Consultant to determine the correct scale. The State Prevailing Wage Rates may be obtained from the California Department of



Industrial Relations (“DIR”) pursuant to California Public Utilities Code, Sections 465, 466, and 467 by calling 415-703-4774. Appropriate records demonstrating compliance with such requirement shall be maintained in a safe and secure location at all times, and readily available at City’s request. Consultant shall indemnify, defend, and hold City and its elected and appointed boards, members, officials, officers, agents, representatives, employees, and volunteers harmless from and against any liability, loss, damage, cost or expenses (including but not limited to reasonable attorneys’ fees, expert witness fees, court costs, and costs incurred related to any inquiries or proceedings) arising from or related to (i) the noncompliance by Consultant or any party performing the Services of any applicable local, state, and/or federal law, including, without limitation, any applicable federal and/or state labor laws (including, without limitation, the requirement to pay state prevailing wages and hire apprentices); (ii) the implementation of Section 1781 of the Labor Code, as the same may be amended from time to time, or any other similar law; and/or (iii) failure by Consultant or any party performing the Services to provide any required disclosure or identification as required by Labor Code Section 1781, as the same may be amended from time to time, or any other similar law. It is agreed by the Parties that, in connection with performance of the Services, including, without limitation, any and all public works (as defined by applicable law), Consultant shall bear all risks of payment or non-payment of prevailing wages under California law and/or the implementation of Labor Code Section 1781, as the same may be amended from time to time, and/or any other similar law. Consultant acknowledges and agrees that it shall be independently responsible for reviewing the applicable laws and regulations and effectuating compliance with such laws. Consultant shall require the same of all subcontractors.

7.3 Licenses and Permits. Consultant represents and warrants to City that Consultant and its employees, agents, and any subcontractors have all licenses, permits, qualifications, and approvals of whatsoever nature that are legally required to practice their respective professions. Consultant represents and warrants to City that Consultant and its employees, agents, and subcontractors shall, at their sole cost and expense, keep in effect at all times during the term of this Agreement any licenses, permits, and approvals that are legally required to practice their respective professions. In addition to the foregoing, Consultant and any subcontractors shall obtain and maintain during the term of this Agreement valid Business Licenses from City.

## **SECTION 8. TERMINATION AND MODIFICATION.**

8.1 Termination. City may cancel this Agreement at any time and without cause upon written notification to Consultant.

8.2 Termination by Consultant. Consultant may cancel this Agreement upon 30 days’ written notice to City.

8.3 Consequences of Termination. In the event of termination, Consultant shall be entitled to compensation for the Services performed up to the date of termination; City, however, may condition payment of such compensation upon Consultant delivering to City any or all documents, photographs, computer software, video and audio tapes, and other materials provided to Consultant or prepared by or for Consultant or City in connection with this Agreement.

8.4 Extension. City may, in its sole and exclusive discretion, extend the end date of this Agreement beyond that provided for in Subsection 1.1. Any such extension shall require a written amendment to this Agreement, as provided for herein. Consultant understands and agrees that, if City grants such an extension, City shall have no obligation to provide Consultant with compensation beyond the maximum amount provided for in this Agreement. Similarly, unless authorized by the Contract Administrator, City shall have no obligation to reimburse Consultant for any otherwise reimbursable expenses incurred during the extension period.

8.5 Amendments. The Parties may amend this Agreement only by a writing signed by all the Parties.

8.6 Assignment and Subcontracting. City and Consultant recognize and agree that this Agreement contemplates personal performance by Consultant and is based upon a determination of Consultant's unique personal competence, experience, and specialized personal knowledge. Moreover, a substantial inducement to City for entering into this Agreement was and is the professional reputation and competence of Consultant. Consultant may not assign this Agreement or any interest therein without the prior written approval of the Contract Administrator. Consultant shall not subcontract any portion of the performance contemplated and provided for herein, other than to the subcontractors noted in Consultant's proposal, without prior written approval of the Contract Administrator. In the event that key personnel leave Consultant's employ, Consultant shall notify City immediately.

8.7 Survival. All obligations arising prior to the expiration or termination of this Agreement and all provisions of this Agreement allocating liability between City and Consultant shall survive the expiration or termination of this Agreement.

8.8 Options upon Breach by Consultant. If Consultant materially breaches any of the terms of this Agreement, City's remedies shall include, but not be limited to, any or all of the following:

- a. Immediately terminate this Agreement;
- b. Retain the plans, specifications, drawings, reports, design documents, and any other work product prepared by Consultant pursuant to this Agreement;
- c. Retain a different consultant to complete the Services described in Exhibit A; and/or
- d. Charge Consultant the difference between the cost to complete the Services described in Exhibit A that is unfinished at the time of breach and the amount that City would have paid Consultant pursuant to Section 2 if Consultant had completed the Services.

## **SECTION 9. KEEPING AND STATUS OF RECORDS.**

9.1 Records Created as Part of Consultant's Performance. All reports, data, maps, models, charts, studies, surveys, photographs, memoranda, plans, studies, specifications, records, files, or any other documents or materials, in electronic or any other form that Consultant prepares



or obtains pursuant to this Agreement and that relate to the matters covered hereunder shall be the property of City. Consultant hereby agrees to deliver those documents to City upon the expiration or termination of this Agreement. It is understood and agreed that the documents and other materials, including but not limited to those described above, prepared pursuant to this Agreement are prepared specifically for City and are not necessarily suitable for any future or other use. Any use of such documents for other projects by City shall be without liability to Consultant. City and Consultant agree that, until final approval by City, all data, plans, specifications, reports, and other documents are confidential and will not be released to third parties without prior written consent of both Parties unless required by law.

9.2 Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for City to copy, use, modify, reuse, or sublicense any and all copyrights, designs, rights of reproduction, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, test data, survey results, models, renderings, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings, digital renderings, or data stored digitally, magnetically, or in any other medium, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents and Data"). Consultant shall require all subcontractors to agree in writing that City is granted a non-exclusive and perpetual license for any Documents and Data the subcontractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents and Data. Consultant makes no such representation and warranty in regard to Documents and Data which were prepared by design professionals other than Consultant or provided to Consultant by the City. City shall not be limited in any way in its use of the Documents and Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at City's sole risk.

9.3 Consultant's Books and Records. Consultant shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for the Services or expenditures and disbursements charged to City under this Agreement for a minimum of three (3) years, or for any longer period required by law, from the date of final payment to Consultant under this Agreement. All such records shall be maintained in accordance with generally accepted accounting principles and shall be clearly identified and readily accessible.

9.4 Inspection and Audit of Records. Any records or documents that Section 9.3 of this Agreement requires Consultant to maintain shall be made available for inspection, audit, and/or copying at any time during regular business hours, upon oral or written request of City. Under California Government Code Section 8546.7, if the amount of public funds expended under this Agreement exceeds TEN THOUSAND DOLLARS (\$10,000.00), this Agreement shall be subject to the examination and audit of the State Auditor, at the request of City or as part of any audit of City, for a period of three (3) years after final payment under this Agreement.

## **SECTION 10. MISCELLANEOUS PROVISIONS.**

10.1 Attorneys' Fees. If either Party to this Agreement brings any action, including an action for declaratory relief, to enforce or interpret the provision of this Agreement, the prevailing Party shall be entitled to reasonable attorneys' fees and expenses including costs, in addition to



any other relief to which that Party may be entitled; provided, however, that the attorneys' fees awarded pursuant to this Section shall not exceed the hourly rate paid by City for legal services multiplied by the reasonable number of hours spent by the prevailing Party in the conduct of the litigation. The court may set such fees in the same action or in a separate action brought for that purpose.

10.2 Applicable Law; Venue. The internal laws of the State of California shall govern the interpretation and enforcement of this Agreement. In the event that either Party brings any action against the other under this Agreement, the Parties agree that trial of such action shall be vested exclusively in Riverside County.

10.3 Severability. If any provision of this Agreement is held invalid, the remainder of this Agreement shall not be affected thereby and all other parts of this Agreement shall nevertheless be in full force and effect.

10.4 Section Headings and Subheadings. The section headings and subheadings contained in this Agreement are included for convenience only and shall not limit or otherwise affect the terms of this Agreement.

10.5 No Implied Waiver of Breach. The waiver of any breach of a specific provision of this Agreement does not constitute a waiver of any other breach of that term or any other term of this Agreement.

10.6 Successors and Assigns. The provisions of this Agreement shall inure to the benefit of and shall apply to and bind the successors and assigns of the Parties.

10.7 Consultant Representative. All matters under this Agreement shall be handled for Consultant by Missy Kern ("Consultant's Representative"). The Consultant's Representative shall have full authority to represent and act on behalf of Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures and for the satisfactory coordination of all portions of the Services under this Agreement.

10.8 City Contract Administration. This Agreement shall be administered by a City employee, Michelle Sarkissian, IT Analyst ("Contract Administrator"). All correspondence shall be directed to or through the Contract Administrator or his designee. The Contract Administrator shall have the power to act on behalf of City for all purposes under this Agreement. Unless otherwise provided in this Agreement, Consultant shall not accept direction or orders from any person other than the Contract Administrator or his designee.

10.9 Notices. Any written notice to Consultant shall be sent to:

IK CONSULTING, LLC  
Attn: Missy Kern  
PO BOX 17661  
TUCSON, AZ 85731



Any written notice to City shall be sent to the Contract Administrator at:

City of Menifee  
29714 Haun Road  
Menifee, CA 92586  
Attn: Michelle Sarkissian, IT Analyst

with a copy to:

City Clerk  
City of Menifee  
29714 Haun Road  
Menifee, CA 92586

10.10 Professional Seal. Where applicable in the determination of the Contract Administrator, the first page of a technical report, first page of design specifications, and each page of construction drawings shall be stamped/sealed and signed by the licensed professional responsible for the report/design preparation. The stamp/seal shall be in a block entitled "Seal and Signature of Registered Professional with report/design responsibility," as in the following example.

Seal and Signature of Registered Professional with report/design responsibility.
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10.11 Rights and Remedies. Except with respect to rights and remedies expressly declared to be exclusive in this Agreement, the rights and remedies of the Parties are cumulative and the exercise by either Party of one or more of such rights or remedies shall not preclude the exercise by it, at the same or different times, of any other rights or remedies for the same default or any other default by the other Party.

10.12 Integration. This Agreement, including the scope of services attached hereto and incorporated herein as Exhibit A, represents the entire and integrated agreement between City and Consultant and supersedes all prior negotiations, representations, or agreements, either written or oral. The terms of this Agreement shall be construed in accordance with the meaning of the language used and shall not be construed for or against either Party by reason of the authorship of this Agreement or any other rule of construction which might otherwise apply.

10.13 Counterparts. This Agreement may be executed in multiple counterparts, each of which shall be an original and all of which together shall constitute one agreement.

10.14 Execution of Contract. The persons executing this Agreement on behalf of each of the Parties hereto represent and warrant that (i) such Party is duly organized and existing, (ii) they are duly authorized to execute and deliver this Agreement on behalf of said Party, (iii) by so executing this Agreement, such Party is formally bound to the provisions of this Agreement, and (iv) that entering into this Agreement does not violate any provision of any other Agreement to which said Party is bound.

10.15 Nondiscrimination. Consultant covenants that, by and for itself, its heirs, executors, assigns, and all persons claiming under or through them, that in the performance of this Agreement there shall be no discrimination against or segregation of, any person or group of persons on account of any impermissible classification including, but not limited to, race, color, creed, religion, sex, marital status, sexual orientation, national origin, or ancestry.

10.16 No Third Party Beneficiaries. With the exception of the specific provisions set forth in this Agreement, there are no intended third-party beneficiaries under this Agreement and no such other third parties shall have any rights or obligations hereunder.

10.17 Nonliability of City Officers and Employees. No officer, official, employee, agent, representative, or volunteer of City shall be personally liable to Consultant, or any successor in interest, in the event of any default or breach by City or for any amount which may become due to Consultant or to its successor, or for breach of any obligation of the terms of this Agreement.

10.18 No Undue Influence. Consultant declares and warrants that no undue influence or pressure is used against or in concert with any officer or employee of City in connection with the award, terms or implementation of this Agreement, including any method of coercion, confidential financial arrangement, or financial inducement. No officer or employee of City shall receive compensation, directly or indirectly, from Consultant, or from any officer, employee, or agent of Consultant, in connection with the award of this Agreement or any work to be conducted as a result of this Agreement.

10.19 No Benefit to Arise to City Employees. No member, officer, or employee of City, or their designees or agents, and no public official who exercises authority over or has responsibilities with respect to this Agreement during his/her tenure or for one (1) year thereafter, shall have any interest, direct or indirect, in any agreement or sub-agreement, or the proceeds thereof, for the Services to be performed under this Agreement.

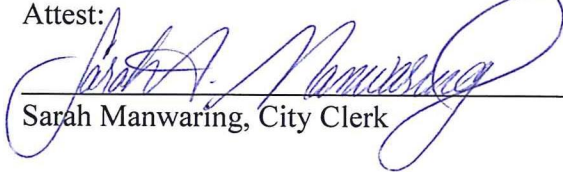
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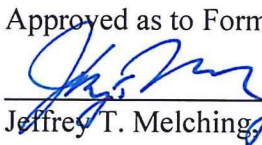


IN WITNESS WHEREOF, the Parties hereto have executed and entered into this Agreement as of the Effective Date.

**CITY OF MENIFEE**


  
\_\_\_\_\_  
Bill Zimmerman, Mayor

Attest:  
  
\_\_\_\_\_  
Sarah Manwaring, City Clerk

Approved as to Form:  
  
\_\_\_\_\_  
Jeffrey T. Melching, City Attorney

**CONSULTANT**

  
\_\_\_\_\_  
Melissa Kern, Managing Partner

  
\_\_\_\_\_  
Constance Ingram, Managing Partner

[Note: 2 officer's signatures required if  
Consultant is a corporation, unless provided  
with a certificate of secretary in-lieu]

**EXHIBIT A**  
**SCOPE OF SERVICES**



<b>Offsite Consulting Services – Existing Record Configuration</b>	<b>~\$30,375.00</b>
✓ Existing Record Configuration Updates*	\$17,550.00
✓ Workflow Updates for up to 120 existing Records	\$12,825.00
<b>Offsite Consulting Services – New Module Configuration</b>	<b>~\$33,075.00</b>
✓ Fire Module Setup	\$6,750.00
✓ Configuration of up to 12 Fire Records**	\$19,575.00
✓ Up to 4 Reports (including Permit, Inspection Card plus 1 Financial Report and 1 Simple Letter)	\$6,750.00
<b>Offsite Consulting Services – ACA Implementation</b>	<b>~\$44,550.00</b>
✓ Building Module ACA Setup	\$1,350.00
✓ ACA Configuration of up to 20 Building Department Records***	\$40,500.00
✓ Inspection Calendaring Configuration	\$2,700.00
<b>Offsite Consulting Services - Integrations</b>	<b>~\$39,325.00</b>
✓ GIS Integration	\$10,200.00
✓ Laserfiche Integration	\$13,600.00
✓ GoEnforce Integration ****	\$15,525.00
<b>Onsite Consulting Services</b>	<b>~\$22,680.00</b>
✓ Initial Project Startup – Quick Wins Addressed	\$3,240.00
✓ 6 Months – 3 Day Onsite Visits Each Month	\$19,440.00
<b>Training</b>	<b>~\$11,340.00</b>
✓ Three (½ Day) New User Interface upgrade training for End Users	\$2,430.00
✓ One (1½ Days) End User class for new End Users on new Interface	\$2,430.00
✓ One (3 Days) Civic Plat Form Administrator Training	\$4,860.00
✓ One (1 Day) ACA Administrator Training	\$1,620.00
<b>Estimated Travel Expenses</b>	<b>~\$18,000.00</b>
✓ Initial Project Startup – Quick Wins	\$1,800.00
✓ Monthly Onsite for 6 Months	\$10,800.00
✓ End User Training	\$1,800.00
✓ Civic Platform Administrator Training	\$1,800.00
✓ ACA Administrator Training	\$1,800.00

**Total Estimated Investment: \$199,345.00**

\* Includes record deactivation for records not in use, removal of data fields for fields not needed and addition of new data fields on existing records; does not include any new scripting functionality outside of the standard Best Practice Template scripts already in place.

\*\* Costs based on City receiving authorization from Moreno Valley, CA to export out at no expense and utilize and export their Fire record structure and all items related to the records, except fee calculations (assuming the City's fee calculations are different than Moreno Valley's).

\*\*\* Assumes valid business license information is current within the Licensed Professional Records in order to allow for confirmation of valid license. Also assumes a maximum of 20 Record Setups, if fewer records are identified, this cost could decrease. If payments are desired to be taken online, the City must utilize an established payment adapter, such as PayPal. Does not include a custom payment adapter as a part of this implementation.

\*\*\*\* This cost is tentative based on knowledge of other integrations with other companies and discussion City staff has had with GoEnforce. A scoping meeting will need to be scheduled to define exactly what the requirements of the integration are and what opportunities for integration exist within the GoEnforce software. Based on this scoping meeting the cost of this integration could go up or down.

*Note: On site travel expenses are estimated expenses, and will be billed at completion of travel for actual expenses incurred.*

## PAYMENT TERMS

Payment for Consulting will be at billed based on contract terms.

This is a time and materials quote. Unless otherwise stated in the contract, billing will occur on a monthly basis for all hours actually expended for the previous month.

IK Consulting, LLC expects payment to occur within 30 days of receipt of invoice unless otherwise agreed to.

**Sales Tax** or any other applicable taxes are **not included** in any of this proposal's pricing information. If Sales tax or any other tax becomes applicable, these taxes will then need to be added to the proposed pricing.

Quote valid for 90 days from date of quote.

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Acceptance and Authorization  
Authorized Signature for Menifee, CA

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Date



**Consulting Services****Off Site Assistance – Hourly****\$135.00 / Hour**

- Assistance with the Civic Platform, as necessary.

**Training – Daily****\$1,600.00 / Day**

- Daily training, as requested, for the Civic Platform or add on products.

**Estimated Travel Expenses****\$1,800.00 / Week**

*Note: This is a time and materials quote and client will be billed based on hours actually worked. All work to be completed based on request, and expenses to be reimbursed, as incurred..*

**PAYMENT TERMS**

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This is a time and materials quote. Unless otherwise stated in the contract, billing will occur on a monthly basis for all hours actually expended for the previous month.

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Quote valid for 90 days from date of quote.

\_\_\_\_\_  
Acceptance and Authorization  
Authorized Signature for Menifee, CA

\_\_\_\_\_  
Date

IC Quote Category	Category Quote	ID#	Topic	Quick Fix	Short Term	Long Term	Origin	Description	Summary	Recommendations	Links to Appendix 1 Content	ICC Estimated Hrs	ICC Notes
Existing Record Configuration	225 hours	2	Fully Implement Planning		X		Kick Off	Fully implement Planning processes	Planning users manage most tasks outside the system, using spreadsheets, email, and network drive folders. Accela is only used to access fees.	Users need to be able to track all activities currently kept outside the system, full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped workflow. Users will be able to track all activities currently kept outside the system, full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped engineering module.		80	Estimate 20 Planning records at 3-4 hrs each, includes analysis, estimate 5-7 workflows to share, and necessary fee schedules.
Existing Record Configuration		3	Fully Implement Engineering		X		Kick Off	Fully implement Engineering processes	Engineering users manage most tasks outside the system, using spreadsheets, email, and network drive folders. Accela is only used to access fees.	Users will be able to track all activities currently kept outside the system, full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped engineering module.		100	Estimate 20 Engineering records at 4-5 hrs each, includes analysis, estimate 10-12 workflows to share, and necessary fee schedules.
Existing Record Configuration		18	Process Improvement	X			Building Permits	Enhance Mobile Workflow permit review process	The City developed a new record type, in-house, for Mobile Home Permitting. Staff would prefer the existing workflow to be replaced with the workflow from another existing record type.	Users can be a single change, as long as there are no scripting or repeating steps. The new record type can be pointed to a new workflow. If there are significant changes needed, a pre-existing workflow can be cloned in Workflow designer and modified for any notifications or task assignments that would not apply to the Mobile Home record type.		3	Review and update of workflow for one record.
Existing Record Configuration		26	Process Improvement		X		Shadow Building	Users send and receive review sign-offs via email	Counter staff often works with Accela and email open in a split-screen view on the monitor. As part of the review process, and to assist with the workflow, staff will check email for sign-offs by Water and Fire, then turn to do work in Accela.	Once the system is fully configured to match Meriter's actual business processes, using email will be replaced with the ability for staff to use workflow tasks and statuses to track approvals.		30	Setup automated emails to send from the system, based on rules identified by staff during review/analysis. This requires Scripting and Notification Template setup for each notification desired - quote estimates that 4 notifications may be needed, but one item is in place, additional templates become easier to create/implement.
Existing Record Configuration		27	Process Improvement	X			Shadow Building	Manual checks in and out of the system	Staff manually checks workflow comments and statuses, then searches for physical plans in an outbox (Engineering, for instance), then asks the reviewing staff who searches a series of folders on a network drive, then a spreadsheet, and finally post-it notes. In one instance all these tasks were performed only to discover the plans were resubmitted.	The current process exists because Accela was never fully configured to match Meriter's actual business processes. Properly configured workflow and statuses can minimize many of the tasks performed outside the system. One key improvement will be to have a single workflow for all reviews, and to always maintain an accurate status for staff and customers.			This task would be accomplished with several of the other "Existing Record Configuration" updates to Workflow and processes, and full implementation/use of Workflow.
Existing Record Configuration		29	Process Improvement		X		Shadow Building	Plan approvals tracked on paper	The City uses paper tracking sheets for multi-departmental plan approvals (Engineering, Public Works, Planning, Fire, Building).	Many agencies have sheets like this that stay with paper plans. It is generally a good idea to have a tracking sheet with Accela record ID and contact or project name, but plan review tasks should be managed in Accela. Until all staff that is involved in a given workflow has access to the system, the tracking sheet is necessary to help staff stay on top of their work. As part of the effort to improve existing workflows and user experience, workflows should be reviewed for opportunities to simplify. It will be important to account for any scripts, task assignments, notifications, and other workflow elements that are currently being designed or in development. From what I saw, these types of features are not in place for most workflows.		10	This would include inspection setup for Planning, including Calendars and User updates, as applies. Possible inspection scheduling scripts, depending on the rules and when/how these get scheduled.
Existing Record Configuration		31	Process Improvement	X			Shadow Building	Workflow tasks can be consolidated	After initiating a permit, staff manually moves workflow to the 2nd task of the City workflow, which is mostly unchanged from "BPR" designs. The workflow is currently implemented and some do not match actual business processes.	In addition to implementing the Planning module, Planning staff should have a simple inspection type configured to track site visit and inspection tasks. This type of workflow could also be set up with mobile licenses and trained on Accela Mobile or Accela Inspector to perform their work in the field.		40	This sounds like a simple fix, and it may be for some records. The DIF fees need to be updated, and grouped for ease of use. Depending on the amount of "automation" desired for the assessment of fees, scripts would need to be created, and some of these would need to be tested. I've attached links to online training videos that cover the basics of fee configuration, including auto-assigning/forcing fees. I've also attached links to online training videos that cover the basics of fee configuration, including changing fee descriptions.
Existing Record Configuration		35	Process Improvement		X		Shadow Building	Planning inspections not tracked	Planning site visits and walkthroughs are not configured as inspections in the system and are not tracked in any other way in Accela. In general, staff has to ask Planning staff about these inspections, and details are missed.	Any fee that is based at a specific value and is always assessed as a given amount, such as the fee for a site visit, can be automated. The fee for an inspection, however, is not. I've attached links to online training videos that cover the basics of fee configuration, including changing fee descriptions.		35	Meet with staff and update fee schedules on 70 records. Only updates for items going forward. I've attached links to online training videos that cover the basics of fee configuration, including changing fee descriptions.
Existing Record Configuration		36	Process Improvement	X			Shadow Building	Fee values are manually entered	Some fees are manually entered, even though many of these are simple constant values that could be automated. DIF fees are a good example of users manually select 7 fee items and then invoice each permit.	Fee item descriptions are easy to change by system administrators or Group Identifiers, so the fee description is easy to change without impacting other parts of the system. I've attached links to online training videos that cover the basics of fee configuration, including changing fee descriptions.		20	The gets deep quickly, depending on how many versions of the forms you have for each module - so they have multiple of the same form that need updating. After a staff level, ICC would suggest we compare those forms, and back them up to the agency level, so there are not too many versions to maintain. Most agencies have 100+ forms that need to be reviewed and updated. Not difficult, but time consuming to review and update each one.
Existing Record Configuration		37	Process Improvement		X		Shadow Building	Fee schedule and item names are not descriptive enough	In several cases, fee descriptions do not readily inform users that they are the fees they're looking for.	Fee item descriptions are easy to change by system administrators or Group Identifiers, so the fee description is easy to change without impacting other parts of the system. I've attached links to online training videos that cover the basics of fee configuration, including changing fee descriptions.			Covered with full Planning implementation in ID2.
Existing Record Configuration		38	User Experience	X			Shadow Building	Screens are not optimized for user roles	Various screens contain data fields staff never uses, including list and form screens.	Evaluate every system list and detail form in context of the user role. I've attached links to online training videos that cover the basics of fee configuration, including changing fee descriptions.			
Existing Record Configuration		40	Fully Implement Planning		X		Shadow Planning	Enhance existing workflows	Planning staff open cases in the Planning Module to add fees and generate invoices (P). Fees are calculated in a spreadsheet and users copy/paste them into Accela. Cases are then manually closed without ever processing workflow. Workflows require basic changes to meet the needs of actual business processes.	Full review of workflow and fee calculation is a great way to begin. There is no reason fees cannot be calculated in Accela (even automatically with minimal user input). Workflow tasks must match City processes and reviewing groups. Notifications and training on task management will be needed to recognize the efficiencies Accela can offer when set up correctly.			
Existing Record Configuration		41	Fully Implement Planning		X		Shadow Planning	Add notifications	All internal and external communications exist outside the system. Email, in-person, and paper methods track and drive workflow.	Notifications are critical to efficiency and email should only be involved in exceptional cases. Accela has developed configurable scripts for notifications that make it easy to manage and adjust how notifications are sent. I've attached links to online training videos that cover the basics of fee configuration, including changing fee descriptions.		30	Link to ID2L, and see if Templates can be combined with Building. If not, some hours would be necessary to configure notifications and scripting for Planning needs. Some estimate as Building if they cannot be shared.
Existing Record Configuration		43	Fully Implement Planning		X		Shadow Planning	Add fee automation	Fees are calculated outside the system, but users also add fee values to Planning cases in Accela.	Whenever users find themselves directly entering a value of "1" to add a standard fee, there is an opportunity to automate. Fees that are always added at a certain point of workflow, and that are a simple constant value, can be assessed and even injected automatically when a user sets a specific workflow status. As part of the "reimplementation" of the Planning module, it will be helpful to identify all fees that are easy to automate.			Covered with full Planning implementation in ID2.
Existing Record Configuration		50	Fully Implement Planning		X		Planning	Revise workflow to match processes	Planning staff cannot use workflow because most of the review tasks do not match the actual review they perform, those that do are not in the right order, and workflow is not configured/scripted to account for multiple review cycles (usually 3 rounds of revision).	As part of the effort to reimplement Planning, getting the workflow to match City processes is the first step. Many customers have scripting and Custom fields that are used to track multiple revisions. Meritline can either work with Meritline to create a new workflow, or a script that works, or can work with Accela on a partner to develop the scripting and configuration necessary.			Covered with full Planning implementation in ID2.
Existing Record Configuration		53	Reporting Enhancements		X		Planning	Rounding issue on invoices	Average-based fees are being rounded up when they appear on invoice reports. This is not a rounding error, as they appear correctly in the report. It is only when they get to the invoice report that the round-up occurs.	Review any scripting that is used to calculate these fees for rounding anomalies. Also review the Invoice report to ensure there are no calculations or rounding occurring within the logic of the report itself, including looking at individual field parameters.			Corrected with full Planning implementation in ID2 (there can be corrected, but the fees have to be updated to round to the decimal that Planning wants to use (each, increments of 100, 1000, etc).



Existing Record Configuration	Reporting Enhancements	X	Planning	Notes and Fee descriptions needed on invoice	Staff indicated that invoices would be greatly improved if certain role fields were added and if fee descriptions were printed on invoice reports	In addition to reviewing the invoice report for rounding adjustments and fee descriptions, staff should be reviewed with staff to add details that are currently missing.	7	Modify invoice and receipt with system variables, and new fields. Also enhance to work with Refunds.
Existing Record Configuration	54 User Experience	X	Planning	Review tasks are read only after a status change	When Planning staff on a review task to "Revisions Required", they can no longer edit that task and need permission with superior rights to edit. This does not match desired permission controls on workflow.	User group IDs and other permission controls should be reviewed and adapted.	10	This requires the review of all Planning User Groups setup, and update of all IDs updated, based on desired changes. We would ask all questions, so this would be a one time User Group fix. If other modules need this, it takes about 10 hours per module, to review and then update all necessary IDs in the various user groups.
Existing Record Configuration	58 Process Improvement	X	Planning	Custom fields are not used	Many records show Custom fields that are never used and do not match City processes.	Even below efforts to fully implement the Planning module are underway, it is reasonable to review with staff which Custom fields are not used and disable them in AA Admin.	8	Covered with full Planning implementation in ID2.
Existing Record Configuration	61 Process Improvement	X	Planning	Fee credits are time consuming	Users occasionally add negative fee amounts to act as credits. This is described as a slow process.	If there are well-defined rules for applying credits to records, then scripts should be devised that automate the calculation of credits as negative fees and apply them to the record.		Fees, Credits and Refunds can be very complex, and the order in which this happens is very important to processing. Would estimate 8 hours to review how they do it now, how it should be done, and then modifications to fee schedules and/or payment methods, to accomplish desired outcome.
Existing Record Configuration	62 Fully Implement Planning	X	Planning	Replace activities tracked in spreadsheets	Users cannot use the system as currently configured and in order to drive system adoption, all activities tracked in spreadsheets must be replicated or improved in Accela.	To replace these spreadsheets, the following efforts must be completed: 1) add and remove record types to match City application types; 2) ensure workflows match actual City processes with the right tasks, right task order, right record statuses, and right task statuses; 3) Track review cycles in workflow and Custom fields; 4) ensure all staff is available in the system; 5) ensure emails configured to notify staff of assigned tasks and follow up; 6) ensure staff are trained on the system; 7) ensure reports are accurate and available to all who need them; 8) employ task assignment dashboards to monitor workload.	30	This is covered by several other Planning items. However, this also lists reports and dashboards, which are not listed anywhere else. Not sure how many items this entails, but put 30 hours as a placeholder for additional enhancement to what the other items already cover.
Existing Record Configuration	64 Fully Implement Engineering	X	Engineering	Tasks and statuses tracked in spreadsheets	Similar to the Planning Department, Engineering staff track all tasks and statuses in a spreadsheet, and communicate via email.	Users need to be able to track all activities currently kept outside the system. Full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped system. Full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped system.		Covered with full Engineering implementation in ID3.
Existing Record Configuration	65 Fully Implement Engineering	X	Engineering	Accela only used to generate record IDs and invoices	Similar to the Planning Department, Engineering staff create new records for the sole purpose of generating a record number, adding fees, and printing invoices or send paper copies for comments on plan review. Comments are not always entered into Accela. No automated notification or tasks.	Users need to be able to track all activities currently kept outside the system. Full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped system. Full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped system.		Covered with full Engineering implementation in ID3.
Existing Record Configuration	66 Process Improvement	X	Engineering	Engineering reviews on building permits not tracked in Accela	Users attempted to leverage the system's task assignment and workflow features but quickly learned that the system was not set up to make that easier than using a spreadsheet and email.	Users need to be able to track all activities currently kept outside the system. Full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped system. Full review of requirements will inform a team of Accela and/or partner resources in designing, scoping, and delivering a re-vamped system.		This would be covered with the review and update of the Building workflows. Assume notifications are covered with the Building Notification ID36.
Existing Record Configuration	67 Fully Implement Engineering	X	Engineering	Inspection details not tracked in Accela	Engineering inspection details, permits, results, comments, and flags, pending bond release notifications, etc. are not tracked in Accela, nor in the workflow/status spreadsheets staff use.	Engineering staff should be able to use the Inspector mobile app to perform inspections and track them in the system. A full review of requirements needs to take place. After that, Accela or a partner can assist with inspections with fields, checkboxes, and automation. Additional work will be required to build out the system, including flags, conditions, Custom fields (for track bond release, etc.), and notifications. Staff will need to be trained on using the Inspector app and how to track and manage inspections, conditions, notifications, and other features in the system.		Covered with full Engineering implementation in ID3.
Existing Record Configuration	72 Fully Implement Engineering	X	Engineering	Ensure all activities are included in implementing Engineering	There was discussion on the importance of ensuring that any proposal to complete the implementation of Engineering activities be all inclusive. The goal is to configure the system to efficiently track all Engineering record types. It will also be important to architect the solution appropriately, for instance, by identifying specific record types to act as master or parent records for Engineering (and Planning).	Overall solution architecture is best designed by an Accela solution architect. Recommendation is to include Accela in any future projects involving Engineering. Recommendation is to include Accela in any future projects involving Engineering. Recommendation is to include Accela in any future projects involving Engineering. Recommendation is to include Accela in any future projects involving Engineering.		Covered with full Engineering implementation in ID3.
Existing Record Configuration	73 Fully Implement Engineering	X	Engineering	Learn from the City of Ontario, CA	Staff was aware of a successful Engineering implementation in the City of Ontario and is interested in learning how they can leverage this for their own implementation.	It is a good idea for Menifee to define requirements based on Ontario Engineering. Recommendation is to include Accela in any future projects involving Engineering. Recommendation is to include Accela in any future projects involving Engineering. Recommendation is to include Accela in any future projects involving Engineering.		This can be a good idea, but can also cause many issues of copying other jurisdiction system items into your agency which is not good. This can be reviewed and evaluated, along with ID3 in the re-work of Engineering records.
Existing Record Configuration	85 Process Improvement	X	Shadow Engineering	Clean up existing configuration	Users skip a great deal of fields and intake sections when generating a new record. Much of the existing configuration is not being used and should be removed or replaced.	There is no reason to wait until Engineering is fully implemented before beginning to remove data fields not in use. Most screens in the system have a "Show/Hide" button that allows users to determine which fields are visible to which user groups.		Covered with full Engineering implementation in ID3.
Existing Record Configuration	91 Process Improvement	X	Inspections	Automate workflow with inspections	Some record types are configured to progress workflow when inspections are resulted, others are not.	Review each workflow with permit and inspection staff to identify situations where an inspection result should progress workflow. These are relatively easy scripts to implement.	10	Review of workflows and update missing scripts to automate inspection processing.
New Module Configuration	1 Implement Fire Prevention	X	Kick Off	Modify an existing fire prevention module from another jurisdiction	The City is currently seeking a proposal to implement a separate module for the County Fire Department users that work with the City. There was discussion around the complexity of the existing fire prevention module in the City of Menifee and how much of it should be used by the County Fire Department users that work with the City.	Moreno Valley is likely to have a configuration that can be used, though it will likely need to be scaled back to 3) ensure Menifee only implements what it needs, and 2) ensure the project is quick to go live.	300	This sounds like it's an easy import, but there are many security and user items that can be very complex to implement. This list to be very carefully handled and some pieces may be manual. Estimated hours based on implementation of 9 records, with 5 BPs, including analysis sessions, new module setup, security and 1360 items, along with 4 reports. If evaluation and import As is from Moreno, this could probably be done in about 60-80 hours. Review and analysis is still necessary, and then the hours are dependent upon how many changes are needed, and how much manual entry is necessary.
New Module Configuration	94 Implement Fire Prevention	X	Fire	Keep the solution simple	Discussion around the complexity of the existing fire prevention module in the City of Menifee and how much of it should be used by the County Fire Department users that work with the City.	If the new fire module is based on an existing installation, Moreno Valley would like to see a demo of the module. Recommendation is to include Accela in any future projects involving Engineering. Recommendation is to include Accela in any future projects involving Engineering.		Duplication of ID1.

ACA Implementation	330 hours	9	Implement Online Services	X					The City is currently seeking a proposal to implement online permit applications and other ACA features, including online payment (currently using ActiveGate). The City wants to go live with simple online permit applications and payments within the next 90 days, after piloting the new features with selected contractors.	Designing and implementing basic notifications, simple permitting applications, and payment features will be a good start to the City's online initiative. More complex applications and permits with lengthy reviews and multiple review cycles should not be added to ACA after the initial launch. The City will continue to implement (especially to workflow, contacts, and notifications).	180	Module setup and form clean up for Citizen Access for all Modules; Configuration items and settings, based on Agency needs; Configuration of up to 30 Record Types including integration with GIS. Review and testing of the system for online submission. Integration for Payment Adapter must be an Accela established Payment Adapter - does not include a Custom Adapter, which can be up to 120 hours. Additional online inspection scheduling updates - based on rules for online scheduling, as defined by staff.
Integrations	290 hours	4	Integrate to GIS	X					Permit techs use a 3rd party GIS tool to look up addresses when they are installing new permits. Users look up address, parcel, and owner information, then copy and paste these into the Accela intake form.	Implementing XAPO is recommended as a way to ensure data accuracy and eliminate the need for staff to copy and paste. XAPO is a real time integration to GIS that automatically populates APO data based on the results of a look up performed by staff.	90	Setup of GIS and XAPO. If desired. Hours include some scripting for fields in records, and possible fee calculations.
Integrations		5	Integrate to GIS	X					The City has never updated their APO since the system went live. Users manually look up validated APO data in GIS, then copy into the transactional records. There is a monthly conversion of validated APO data that is added to the City GIS by ParcelQuest, a contractor for Riverside County.	Implementing XAPO will ensure the latest APO data is available as staff creates new permits. The alternative is to periodically request Accela Customer Support manually load APO data into the system through a series of staging tables. XAPO is the better solution as it requires much less effort for Meritree staff.	40	This is with a quarterly conversion update, or a direct link to XAPO. Hours depend on what choices are made, but put some hours here in case a conversion is desired. Assuming original program files are not available.
Integrations		6	Integrate to GIS	X					Given that the City's GIS is the system of record for APO data, we discussed integrating to GIS with Accela's Meritree XAPO Adapter. The only real concern was potential performance hits.	Meritree can get XAPO set up for a non-production environment to test performance. It is likely that any time spent by the integration pulling in data from GIS will be offset by the time saved by not having to deal with copy and paste activities. Ensuring data accuracy is another benefit of XAPO.		Same as ID4.
Integrations		7	Integrate to GoInforce	X					Staff described a number of functions an ideal interface would perform: 1) pull read-only violation record from GoInforce to the reference parcel and update the record with the City's GoInforce and update the record with the City's GoInforce and update the record with the City's GoInforce when items are placed against properties.	All of these functions are possible and I recommended Government Outreach has indicated that they have a good idea on how to architect and deliver an interface.	150	Don't know for sure what is required for this to integrate. May take custom adapter, which is very time consuming. Quoting high to cover worst case scenario.
Integrations		10	Integrate to Laserfiche	X					The City is currently working on an integration to Laserfiche, and is planning a long-term project to scan all of their documents into the system. Integration design should allow City Clerk to search Laserfiche and find key data from Accela. City GIS is already integrated with Laserfiche, and Accela Legislative Management will be integrated in the future.	From discussions onsite, it seems Meritree has a handle on this project. Accela can provide assistance if needed. To ensure the integration is successful, we will be using a best practices and leverage the latest API/adapters.	100	Configured for all Modules; rules and upload details need to be created/updated as a part of this process as well.
Integrations		13	Integrate to GoInforce	X					Permit techs either ask Code staff in the office to check on applicant details or send email requesting information from the GoInforce system. When Code responds via email or in person, staff adds a condition to the record. Staff is not able to add conditions/flags to addresses or parcels, which is the preferred location for flags.	In addition to integrating Accela with GoInforce, staff should be trained on how to add conditions to a reference parcel, address, contact, or permit. Code Officers should also be given permissions that allow them to add conditions and non-Code staff needs to have permissions that allow them to remove conditions. Code staff has added. I've attached a link to the 9.2 section on Assigning Conditions (pages 603 - 675), go into detail about condition permissions for users.		Same as ID7.
Integrations		21	Integrate to Laserfiche	X					The City is engaged in a long term project to scan documents using Laserfiche's OCR capabilities. There was some discussion around pulling some of this data (presumably metadata and document content) into Accela via an integration or conversion.	Anytime there is a need to convert documents or data into a live production environment, careful planning is required to analyze how the new data will connect to existing transactions and to plan for test runs during off hours. Bring Accela-hosted makes it easy for an Accela data scientist to be able to assist. If Meritree plans to procure Accela experts, we can help with that. In his experience, Kendall says there are a simple model of a working integration which he can discuss with Meritree. A bi-directional interface can open and close Code cases in Accela from GoInforce, passing violation details and other notes. Code officers can query Accela permits from GoInforce and vice versa. Code officers can query Accela permits status, permit ID, issuance and expiry dates, and even a link to open the record in Accela.		Same as ID10.
Integrations		47	Integrate to GoInforce	X					Kendall Smith with Government Outreach is familiar with integrating his system with Accela through the Connect API. This task is even easier for Accela-hosted agencies.	Recommendation is fully implement Engineering with the Laserfiche records to ensure that all records are properly tracked and accessible to documents. Engineering workflows and notifications in Accela should be designed to accommodate easy access to docs in Laserfiche. Accela Solution Architects can assist in this effort, if needed.		Same as ID7.
Integrations		74	Integrate to Laserfiche	X					Assuming the Engineering module is fully set up to track documents and data relevant to Engineering processes, a Laserfiche integration would make it easier for Engineering to send reports and documents to various departments. Engineering would need reports for asset management. Public Works needs information on the status of permits and other information related to funding, and GIS needs parcel boundary details.	Once the GIS integration is implemented, staff should be trained on how to use the map to perform research and initiate new reports and to ensure SFPEAR forms are set up to allow users to look up and add multiple permits based on a multi-parcel selection. It may also be a good idea to ensure SFPEAR forms are set up to allow users to look up and add multiple permits.	2	Discussion and meeting for options on how to handle this.
Onsite Consulting Services	168 hours	8	User Experience	X					Code staff generally only uses Accela to search for information (read-only) and to flag records for violations and activity. Code should also be given permissions that allow them to flag parcels and addresses. Any conditions added by Code should be removable by non-Code users.	Code staff should be trained on how to ensure the right people can add records to the system. I've attached a link to the 9.2 Administration Guide, where conditions are covered in pages 458 - 478. The section on Assigning Conditions (pages 603 - 675) goes into detail about condition permissions for users.	25	Depending on how the conditions are currently setup, there may be necessary modifications to the existing setup and possible scripts necessary to update hosted database. Additionally, may need some scripts put in place to hold up items, based on outstanding conditions. Additionally, security needs to be reviewed, and possibly updated.
Onsite Consulting Services		11	Process Improvement	X					Permit staff manually enters contact information for applicants, rather than using the look-up or matching features. Users report that this does lead to duplicate entries.	Permit staff should be trained on how to ensure the right people can add records to the system. I've attached a link to the 9.2 Administration Guide, where conditions are covered in pages 458 - 478. The section on Assigning Conditions (pages 603 - 675) goes into detail about condition permissions for users.	5	We can export out the data to review, and then work to merge / clean up existing contacts. It would best if these were as clean as possible, prior to going live with Citizens Access. Amount of effort on this one is estimated based on us identifying, and possibly staff doing the cleanup.
Onsite Consulting Services		15	Process Improvement	X					During application intake (on the "SFPEAR" form), all permit types require users to enter a valuation. Only the Residential Addresses record type retains this valuation after intake. All other record types end up with a valuation of zero, requiring staff to manually enter the valuation again.	This requires a deeper look, but I suspect that there is an easy fix. The issue is likely to be related to record type security, scripting or configuration of the valuation field(s).	2	There is either a bad script or expression, or the fields are not consistent. Shouldn't take much to identify and correct.
Onsite Consulting Services		16	Reporting Enhancements	X					All reports are Ad hoc reports (no Crystal). Users currently print permit reports one at a time, even when permits are in a set and users want to download multiple reports. Currently, the City does not have a report that would be configured to accommodate multiple records at once, especially when run against a set.	Review requirements for the permit report with staff, including when the report needs to be generated (manually or automatically), what data needs to be included, and how the report should be formatted. It is likely that modifying the report to accommodate details from a set of permits is a task that is not too difficult.	25	A permit report that crosses all Building Permits is typically 20-25 hours to create, depending on how many variations you have. Once all pieces are created, we can then add the API logic and publish both reports.





Onsite Consulting Services	83	Fully Implement Engineering	X			Shadow Engineering	Configure Record ID sequence	For some record types, users manually enter unique record IDs. Sequence automation has been configured for all but 3 Engineering record types.	In this is a relatively simple fix. Every record type can be configured with a specific sequence and mask for record IDs.	Training link 3: Documentation link 2	This would be corrected with the Engineering record updates ID3.
Onsite Consulting Services	84	Training & Governance	X			Shadow Engineering	Train users on best ways to search	Users enter the Applicant into the Project Name field to help with searching. In some cases data is entered into fields that aren't really intended to track that data, but users do it to ensure data is printed on an invoice.	This would be covered between the New UI training, and the 1.0 Day User Training. That covers understanding the different types of data, how it is stored, as well as all the options available for searching and what results you will get with each.	Training links 14 & 15	This would be covered between the New UI training, and the 1.0 Day User Training. That covers understanding the different types of data, how it is stored, as well as all the options available for searching and what results you will get with each.
Onsite Consulting Services	85	Process Improvement	X			Shadow Engineering	Record ID sequencing skips numbers	New records have sequences that increase one integer at a time, but when sequences reach "999" through "9999" are skipped and the first record will end in "000".	It sounds like some sequence numbers are not properly setup, but this would be corrected with the Engineering record updates ID3.		
Onsite Consulting Services	87	Quick Wins	X			Shadow Finance	User Interface training	Users were only adding 5 records at a time to Sets, even if there were more than 5 to add. I showed them how to change the settings on the record list screen (Customize Content) to determine the number of records in the list.	This can also be updated for the default form to load with more than 5 at a time by default. That would be covered with the updates to the forms.		
Onsite Consulting Services	88	Quick Wins	X			Shadow Finance	Ad-hoc Reports training	Users were creating an Ad-hoc report because the query was not given them the full data set. I showed them how to get all the data needed. I showed them how to change the query, add filters, and understand why the desired report wasn't returning the right results.	Ad-hoc training is a 1/2 day class, so based on number of people to train, we can offer 3 classes for those interested. If there are more than 4 weeks, there is a more advanced class for another 2-3 hours, if desired.		
Onsite Consulting Services	90	Process Improvement	X			Inspections	Bulk Inspection resulting has issues	Inspection results and configuration are not standardized or set up to facilitate bulk resulting. Users attempting to cascade results for multiple inspections, or sometimes even when manually selecting each result, find themselves having to manually select each result, find the correct result, and then enter every result again.	Inspection setup is a total of 4 parts. Review and update of all inspection groups, disciplines, calendar setup and user setup/light. Need to review all pieces, and update to be standardized.		
Onsite Consulting Services	92	Integrate to GIS	X			Inspections	Optimize daily inspection routes	Staff was interested in automating optimized inspection routes (by time or distance). Each Inspector should begin the day with a pre-ordered, optimized route by district. Users should be able to change the inspection order, from the mobile app and the office. Add and new inspections commit in midday.	Setup of other items required, and then this can be configured. Routing service would have to be added by the Agency, to be available in the Civic Platform.		
Onsite Consulting Services	93	Quick Wins	X			Inspections	User Interface training	Inspectors and inspection admin staff were having difficulty rescheduling inspections. I showed them how to create and edit filters, as individual daily users, to quickly see a list of inspections scheduled for today, for tomorrow, assigned to the logged-in user, and unassigned.	3 hour to work with Inspector staff on both the Civic Platform options and how to manage inspections in the product, and also work on review of forms available in the Apps. 3 hours to work with Admin staff to train on the Quick Queries, Searches, etc.		
Onsite Consulting Services (end ACA Implementation)	95	Process Improvement	X			Planning	Conduct records are erroneous and duplicative	Users are worried that when the City adds online services, customers will have difficulty registering for an account, given the many errors and duplicative records for contacts in the system.	This can happen, but there is functionality to Merge Contact Types. Users can search for themselves, and if they already have a public user setup on another hosted environment, that can be pulled into your environment, and linked together so they can have the same user name and password for multiple environments.		
Civic Platform Administrator Training	23	Training & Governance	X			Building Permits	Workflow Designer training	If staff expressed a need to understand how the Workflow Designer tool works, especially in an environment where all workflows were developed in "Classic".	Suggest full 3 day Accela Administrator Training for Record Configuration. Additionally, there is another 2 day Accela VISO Admin Training available, if those additional pieces are also necessary. linked to ID24 and ID25.	Training links 1 & 4	See ID23
Civic Platform Administrator Training	24	Training & Governance	X			Building Permits	Data Manager training	IT staff needs to understand exactly how Data Manager works to move configuration and reports among TEST, SUPPLY, and PROD.	Training links 5 & 6	See ID23	
Civic Platform Administrator Training	75	Training & Governance	X			IT	City Accela administrator would benefit from attending sessions and training at conferences.	Accela admins are relatively new to the system and need to learn more from Accela and Accela customers.			See ID23
End User Training	44	Training & Governance	X			Shadow Planning	End user training for all users in all departments	Staff would benefit from training on topics like using Related Records, Set Processing, My Filters, Global Search, My Tasks, screen customization, Conditions, Cloning, Ad-hoc Reports, and general topics.	Full User Training is 1 1/2 days. Possibly provide 3 classes in one week, where all items can be reviewed and covered. This should occur after all changes are made to forms and permissions, so staff is seeing how it will look going forward.	Training link 2	
End User Training	76	Training & Governance	X			IT	Users want training videos in the "old UI"	Most of the training materials the City has found on Accela Community is in the new user interface. Staff have expressed a desire to get training on the UI they use every day. Some users have tried the new UI, but no one really knows how to use it or if it is set up correctly.	Suggest training classes on the new UI, along with some new documentation that we can create, using screens from your Agency. Assuming we would hold three 1/2 day classes.	Training link 2	
End User Training	78	Training & Governance	X			IT	Switch users to the "new UI"	It wants to migrate users to the new user interface. A plan must be devised that ensures the switch is accomplished smoothly. All required configuration changes must be in place before users can be trained and the switch executed.	Link also to ID76 for New User UI classes - meant to cover configurations settings, and user group updates for New UI.	Knowledge Articles: links 2 & 3	
Probably Civic Platform Administrator Training - need better understanding of scope/need to be sure	25	Training & Governance	X			Building Permits	Migrating transactional data	IT staff needs to understand how to request moving transactional records, among environments (TEST, SUPPLY, PROD).	This would be a request put into Accela Support. You can also request a quarterly data dump, and you can setup a reporting database to test reports with, at your site.		



Not Quoted - Accla specific issue	77	Miscellaneous	X	IT	Accla support has improved but could be better	City Accla admin says that the Customer Support experience has improved over the last year. Unfortunately, the City has very limited IT staff available to support Accla and really needs Accla Customer Support to solve a lot of their issues. Since these issues tend to be difficult to solve, staff is interested in a better support experience. Staff says the support ticket process in Community is a bad user experience. They would prefer more of an email/phone call process.	The only recommendation that can be made here is to suggest Menifee look into procuring a premium Customer Support package (Gold or Platinum). The City's account executive can provide more details.		This is controlled by Accla, and we are unable to affect change to their processes. We do offer ongoing hourly support, as needed, that is invoked the beginning of each month, for the previous month's issues. We can also offer training and/or web meetings, so we can resolve the issues that arise.	
Not Quoted - Accla specific issue	89	User Experience	X	Inspections	The Inspector mobile app on Android devices is not usable	City inspectors with Android do not use the Inspector app and have provided all the feedback they could offer in the comments section for the app on Google Play. Some inspectors with Apple devices use the app. Most inspectors use paper to record notes and results in the field, then enter these into Accla at the end of the day.	Accla is developing a new app that will improve the user experience on Android devices as well as combine features of the 4 current apps into one. Inspectors can test out the latest version of this app by searching for "Accla Mobile" in Google Play or the App Store. The current version has some basic features, like resulting inspections and creating cases, that the City might find suits their needs. Encourage inspectors to download and try out the app on iOS and Android devices.		We can not modify the App, but we do have many jurisdictions utilizing the standard Accla published Apps. I think some training for staff might be helpful, as they are relatively easy to use, and are very helpful to receive information from the field. Some training quoted with ID77	
Not Quoted - further review required to determine scope/desire	12	Process Improvement	X	Building Permits	Users manually check contractor city licenses in HDL	Users do not actually have search access in HDL, they ask Finance staff to check on licenses. The issue gets more difficult in January, as all City business licenses expire on December 31. Sometimes users have access to a report generated by Finance out of HDL. State licenses are checked via an interface with CSLB.	There are a number of ways to determine the feasibility of developing an integration. Adding a licensing module to Accla should be a long-term goal of the City, if it aligns with their vision.		We can not modify the App, but we do have many jurisdictions utilizing the standard Accla published Apps. I think some training for staff might be helpful, as they are relatively easy to use, and are very helpful to receive information from the field. Some training quoted with ID77	
Not Quoted - further review required to determine scope/desire	39	Process Improvement	X	Shadow Building	Implement Conditions of Approval	Staff describe scenarios where a colleague is absent and there is no way to know if a permit awaiting approval has any outstanding items. Planning staff does not enter any Conditions of Approval.	Depending on the complexity of this topic, this may also be resolved by the implementation of Conditions (and Types that can hold up certain tasks). See ID8.		We can not modify the App, but we do have many jurisdictions utilizing the standard Accla published Apps. I think some training for staff might be helpful, as they are relatively easy to use, and are very helpful to receive information from the field. Some training quoted with ID77	
Not Quoted - further review required to determine scope/desire	49	Integrate to Tyler Cabling	X	Finance	Double data entry	Finance staff processes transactions in Tyler Cabling system, then enters the transaction details in Accla. End of day reconciliation between Accla and Eten.	Guver City, CA has integrated Accla to Tyler Cabling, with the help of Accla integration specialists. There are a few ways to approach an integration for Menifee, but a basic bi-directional interface like the one in Guver City would be very useful in reducing duplicate data entry into two systems. When users invoice fees in Accla, cashiers can look up the invoice number in the Tyler Cabling system and the fees are paid in Tyler, the interface changes the status in Accla to "paid".		We can not modify the App, but we do have many jurisdictions utilizing the standard Accla published Apps. I think some training for staff might be helpful, as they are relatively easy to use, and are very helpful to receive information from the field. Some training quoted with ID77	
Not Quoted - further review required to determine scope/desire	71	Fully Implement Engineering	X	Engineering	Implement a CIP record type	There was interest in configuring a Capital Improvement Project record type that would serve as a master or parent record type for the many permitted activities related to CIPs. The City was interested in an existing template that could be followed as a best practice.	More research is needed to find a customer that has implemented a CIP record Menifee could leverage. An alternative of course would be to gather requirements and design a novel solution for Menifee. It is important to note that the City has implemented a similar system (implemented) to achieve full adoption of the system eliminate external spreadsheets and emails) before adding new processes, like CIP, to the system, which is technically feasible, is not recommended as it requires system features not designed with shared licenses in mind and the City could face challenges, both now and as new features are added, that cannot be predicted as a result of shoring. With the main issue being the cost of licenses, it is recommended that the City discuss this topic with their Account Executive.		The needs to be more discussion on this, but a new record type for CIP is typically around 20-30 hours of work - not including a bunch of scripting. This would include workflow, custom fields, the schedule and inspections.	
Not Quoted - Licensing needs are Accla Specific.	14	Software Licensing	X	Building Permits	City would like to share licenses for Inspectors	As the City grows its Accla implementation, there are concerns that the existing system features are not designed with shared licenses in mind and the City could face challenges, both now and as new features are added, that cannot be predicted as a result of shoring. With the main issue being the cost of licenses, it is recommended that the City discuss this topic with their Account Executive.		You would need to work with Accla for licensing needs. If there are some people that only need to research/review, however, they may be able to utilize Client Access, once that is setup and online. That can save in individual license costs, if they only need to see, and not update.		
Not Quoted - Licensing needs are Accla Specific.	46	Software Licensing	X	Code Enforcement	Code Officers could share licenses	Unless there are technical reasons not to, Code officers would like to share Accla licenses, since there are no real concerns regarding tracking individual officers. Accountability is not an issue since they primarily use GoIntence. Access to Accla is more about maintaining good communications with Building & Safety and other Accla users.		See ID14.		
Not Quoted - Licensing needs are Accla Specific.	63	Software Licensing	X	Engineering	Only a few people have access to Accla	The Engineering department only has 5 user licenses for Accla, although there are more that would use the system, especially if it was configured for their use. Non-licensed staff want to use the system but the City is having difficulty in funding more licensed users.		See ID14.		
Not Quoted - Licensing needs are Accla Specific.	70	Software Licensing	X	Engineering	Add Plan-check consultants as licensed users	The City manually tracks time spent by plan review consultants outside of Accla. Review comments are in Word documents and hours are tracked in spreadsheets. There was discussion around getting these comments into Accla by having consultants upload documents directly to Accla, even the potential of passing the cost down to the 3rd parties.	Procuring licenses for 3rd party plan reviewers and other consultants is certainly possible, and perhaps the easiest solution, especially if costs can be absorbed or passed to the 3rd parties. An alternative would be to set them up with access to ACA once that is live. The City could thus provide a more consistent review process, and they are reviewing with the ability to download and upload documents and notifications system generated but with links to the records on ACA).		See ID14.	
Not Specifically Quoted - further review required to determine scope/desire. May be able to be done during Existing Record Configuration	33	Process Improvement	X	Shadow Building	Refund approvals not in the system	To process refund requests, Building & Safety staff fill out a Word document, print and stamp it, then give it to Finance. Users are not notified if the refund is approved or denied.	An interface to Tyler Cabling can eliminate the need for a manual process to transfer refund requests from the system to Finance. This could be a double work (which an integration could also eliminate), but at least everyone with access would be able to see if a refund was processed.		The correction of ID54 may assist with this. The City can create a receipt that would print for a Refund, and that could facilitate the backup paperwork necessary for the Refund processing.	
Not Specifically Quoted - further review required to determine scope/desire. May be able to be done during Existing Record Configuration	68	Process Improvement	X	Engineering	Implement Time Accounting and cost-recovery features	All Engineering fees and transactions, including Time Accounting for cost-recovery purposes, need to be tracked in Accla.	Review fees that need to be added to Engineering records in the system and indicate which of these are related to cost recovery. I've attached a link to online documentation that explains how to enable Time Accounting features (Configuration Guide, pages 33-34), how to configure the system (User Guide, pages 578-580), and how users leverage the feature (User Guide, pages 579-583).	Documentation: links 3 (pages 839 - 860), 4 (pages 933 - 941), & 6 (pages 579 - 583)	More discussion necessary on this, because there are deposits and hours, and then there is full time accounting. Not sure what is actually necessary to accomplish what Engineering needs. This could be accomplished with the Existing Record updates in ID3, or it could require a full analysis, review and setup of Time Accounting tasks, which is much more involved. Additionally, scripting may also be necessary to charge fees based on those Time Accounting tasks.	
Not Specifically Quoted - further review required to determine scope/desire. May be able to be done during Existing Record Configuration	69	Process Improvement	X	Engineering	Potentially Implement Trust Accounting	Deposit accounts are currently calculated as a percentage of project valuation, although the City may shift to a fixed fee. There was some discussion around the possibility of leveraging the system's Trust Accounting feature (although using a fixed fee was seen as regaining that functionality would require a significant amount of development, staff would like to have a percentage-based threshold for calculating the trust account (or add a flag to the record) when the balance is too low.	This topic was not seen to be a major pain point, but the opportunity exists to implement Trust Accounting if the City deems it necessary. There are some limitations to the Trust Accounting feature, including the fact that Account features, including setting balance thresholds. I've attached links to documentation (Admin, Configuration, and User Guides) that covers the configuration and use of this feature.	Documentation: links 3 (pages 839 - 860), 4 (pages 933 - 941), & 6 (pages 579 - 583)	Use Item58, this may be resolved with updates, or it may require Trust Account setup. Trust Accounts are not nearly as time consuming as Time Accounting, but you do need the Accounts, fees, modifications to accounts, rights, financial reports and several forms.	
Not Specifically Quoted - further review required to determine scope/desire. May be able to be done during Existing Record Configuration	19	Reporting Enhancements	X	Building Permits	Develop a report for 433a approvals	The City wants to approve certain records (permanent foundations, 433a). Not clear if other jurisdictions are involved.	Decide a report that includes the key information and configure it to be automatically generated via workflow or trigger.	Documentation: links 3 (pages 839 - 860), 4 (pages 933 - 941), & 6 (pages 579 - 583)	Average medium report, includes spec and development, is 8-14 hours.	

Not Specifically Quoted - Further review required to determine specifics. May be able to be done during Onsite Services		32	Miscellaneous	X			Shadow Building	Reports run slow at the counter	Occasionally, and more often "before lunch", the invoice report is slow to generate. The staff will go to their desks, where the report runs faster. It is difficult to reproduce this issue.	Menifee may want to take a look at the network and connectivity of workstations compared to users' desktop computers. It appears there are times during and printing reports at times.			This is usually related to how the reports were configured, and possibly a query that was not efficient. Most likely would require about 2 hours per report to review and update for optimization. Then send for publication to both SUPP and PPOD.
Not Specifically Quoted - Further review required to determine specifics. May be able to be done during Onsite Services and/or ACA Implementation		30	Process Improvements		X		Shadow Building	Duplicate data entry for new permits	Staff enters application info into Accela, then reenters the same information on an e-application. In Accela, staff manually creates clones and adds them to a set to get the individual permit numbers. Adding those permit numbers to the e-application allows users to then print.	<p>           * requires more detail on the specifics here will be needed, it sounds like the "application" is not being generated. There also may be an opportunity to automate the cloning of records and adding them to sets, if definitive rules can be outlined by City staff.         </p>			Not sure what an e-application is, but possibly this would be covered with the updates to the various existing configuration or Citizen Access implementation?

Note: All Consulting Services (On/Off Site Assistance, Training and Estimated Travel Expenses) shall be completed and compensated a sum not to exceed (\$199,345.00) as stated in the Professional Services Agreement.