# Lake County, CA

# On-Going Service and Support Proposal

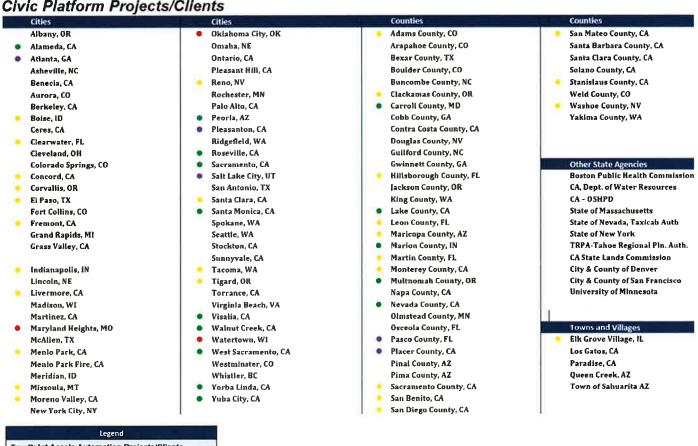**6/16/2022**

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# I. Vendor Background & Qualifications

## TruePoint Company History

TruePoint Solutions, LLC is a privately held software and solutions company based in the Sacramento region. We bring an unparalleled level of experience designing, developing, implementing, and supporting complex government IT solutions. Our team has an average of 16+ years of public sector IT experience.

TruePoint Solutions was established in 2004 and became an Accela certified implementation partner in early 2005. Current implementation projects which TruePoint is involved include:

### Civic Platform Projects/Clients

| Cities | Cities | Counties | Counties |
|---|---|---|---|
| Albany, OR | Oklahoma City, OK | Adams County, CO | San Mateo County, CA |
| Alameda, CA | Omaha, NE | Arapahoe County, CO | Santa Barbara County, CA |
| Atlanta, GA | Ontario, CA | Bexar County, TX | Santa Clara County, CA |
| Asheville, NC | Pleasant Hill, CA | Boulder County, CO | Solano County, CA |
| Benecia, CA | Reno, NV | Buncombe County, NC | Stanislaus County, CA |
| Aurora, CO | Rochester, MN | Clackamas County, OR | Weld County, CO |
| Berkeley, CA | Palo Alto, CA | Carroll County, MD | Washoe County, NV |
| Boise, ID | Peoria, AZ | Cobb County, GA | Yakima County, WA |
| Ceres, CA | Pleasanton, CA | Contra Costa County, CA | |
| Clearwater, FL | Ridgefield, WA | Douglas County, NV | |
| Cleveland, OH | Roseville, CA | Guilford County, NC | |
| Colorado Springs, CO | Sacramento, CA | Gwinnett County, GA | **Other State Agencies** |
| Concord, CA | Salt Lake City, UT | Hillsborough County, FL | Boston Public Health Commission |
| Corvallis, OR | San Antonio, TX | Jackson County, OR | CA, Dept. of Water Resources |
| El Paso, TX | Santa Clara, CA | King County, WA | CA - OSHPD |
| Fort Collins, CO | Santa Monica, CA | Lake County, CA | State of Massachusetts |
| Fremont, CA | Spokane, WA | Leon County, FL | State of Nevada, Taxicab Auth |
| Grand Rapids, MI | Seattle, WA | Maricopa County, AZ | State of New York |
| Grass Valley, CA | Stockton, CA | Marion County, IN | TRPA-Tahoe Regional Pln. Auth. |
| | Sunnyvale, CA | Martin County, FL | CA State Lands Commission |
| Indianapolis, IN | Tacoma, WA | Monterey County, CA | City & County of Denver |
| Lincoln, NE | Tigard, OR | Multnomah County, OR | City & County of San Francisco |
| Livermore, CA | Torrance, CA | Napa County, CA | University of Minnesota |
| Madison, WI | Virginia Beach, VA | Nevada County, CA | |
| Martinez, CA | Visalia, CA | Olmstead County, MN | |
| Maryland Heights, MO | Walnut Creek, CA | Osceola County, FL | **Towns and Villages** |
| McAllen, TX | Watertown, WI | Pasco County, FL | Elk Grove Village, IL |
| Menlo Park, CA | West Sacramento, CA | Placer County, CA | Los Gatos, CA |
| Menlo Park Fire, CA | Westminster, CO | Pinal County, AZ | Paradise, CA |
| Meridian, ID | Whistler, BC | Pima County, AZ | Queen Creek, AZ |
| Missoula, MT | Yorba Linda, CA | Sacramento County, CA | Town of Sahuarita AZ |
| Moreno Valley, CA | Yuba City, CA | San Benito, CA | |
| New York City, NY | | San Diego County, CA | |

| Legend | |
|---|---|
| **TruePoint Accela Automation Projects/Clients** | |
| ● | Accela Legacy Upgrade - Tidemark |
| ● | Accela Legacy Upgrade - Permits Plus |
| ● | Hansen Upgrades |
| ● | Accela Legacy Upgrade - Kiva |

# II. TruePoint Staff

This Project represents an important technology undertaking for the County.  TruePoint will assign talented staff that has in-depth knowledge of your current implementation. Below is a summary of team members and Accela experience.

**TruePoint Solutions Services Team**

| Consultant | Primary Role | Public Sector | Sr. Proj. Manager | Proj. Manager | Lead Management | Business License | Asset Management | Citizen Access | Accela Automation | Citizen Access | Mobile Office | Accela GIS | Accela IVR | EDR | Ad-hoc | Crystal Reports | SSRS | Master Scripts | ACA Pageflow | Batch / Set | Expressions | EMSE API | GovXML | Financial / Cashier | XAPO / Contact | ePayment | EDMS | APO Conversion | Licensed Prof. | History Conv. | Document Conv. |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Keith Hobday | Implementation Consultant | 28 yrs. | | ● | ● | ● | ● | ● | ● | ● | ● | | | ● | ● | | | ● | ● | ● | ● | | | | ● | | | | | | |
| Terry Dunn | Implementation Consultant | 20 yrs. | | ● | ● | ● | | ● | ● | ● | ● | | | ● | | | ● | ● | ● | ● | | | | | | | | | | |
| Cory Probasco | Implementation Consultant | 23 yrs. | ● | | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | | | ● | ● | ● | ● | | | | | | | | | | |
| David Brown | Implementation Consultant | 17 yrs. | | ● | ● | ● | | ● | ● | ● | ● | ● | | ● | ● | | | ● | ● | | ● | | | | | | | | | | |
| Thomas Hornick | Technical Consultant | 21 yrs. | | | ● | | | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | | ● | | | | | | | ● | ● | ● | ● |
| Joe Cipriano | Technical Consultant | 22 yrs. | | | | | | | | | | | | | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Caleb Harshbarger | Technical Consultant | 12 yrs. | | | | | | | | | | | | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Richard Holland | Technical Consultant | 12 yrs. | | | | | | | | | | | | | ● | ● | | | | | | | | ● | | | ● | ● | ● | |
| Michele Niccore | Implementation Consultant | 12 yrs. | | ● | ● | | | ● | ● | ● | ● | | | ● | ● | ● | | | ● | | | | ● | | | | | | | |
| Shauna Minor | Implementation Consultant | 8 yrs. | | | ● | ● | ● | ● | ● | ● | ● | | ● | | | ● | | | | | | | | | | | | | | |
| Lo Saelee | Technical Consultant | 7 yrs. | | | | | | | | | | | | | ● | ● | | | | | | | | | | | | | | |
| McKenzie Helvick | Implementation Consultant | 7 yrs. | | ● | ● | | | ● | ● | ● | ● | | ● | ● | ● | ● | ● | | | | | | | | | | | | | |
| Mike Cox | Technical Consultant | 12 yrs. | | | | | | | | | | | | ● | ● | ● | | | | | | | | | | ● | ● | ● | ● |
| Jay Lum | Technical Consultant | 29 yrs. | | | | ● | | | | | | | | ● | ● | ● | | | | | | | | | | | | | |
| Suzy Santo | Implementation Consultant | 22 yrs. | ● | | ● | ● | | ● | ● | ● | ● | | ● | ● | | | ● | ● | | ● | | | | | | | | | | |
| Deborah Herman | Implementation Consultant | 22 yrs. | | ● | ● | | | ● | ● | ● | ● | | ● | ● | ● | ● | ● | | ● | | | | | | | | | | | |
| Johnny Guest | Implementation Consultant | 14 yrs. | | | ● | | | ● | ● | | | | | | | | | | | | | | | | | | | | | |
| Erin Griffith | Technical Consultant | 14 yrs. | | | | | | | | | | | | ● | ● | ● | | | | | | | | | | | | | |
| Maureen McAleer | Implementation Consultant | 32 yrs. | | ● | | | ● | ● | ● | | | ● | ● | | | ● | | | | | | | | | | | | | |
| Jackie Ramirez | Implementation Consultant | 10 yrs. | | ● | ● | ● | | ● | ● | ● | ● | | ● | | | ● | ● | | ● | | | | | | | ● | | | | |
| Tyler Suarez | Implementation Consultant | 4 yrs. | | ● | | | ● | ● | ● | | | ● | | | | | | | | ● | ● | | | | | | | | |
| Ray Schug | Implementation Consultant | 26 yrs. | | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Erica Rodriguez | Implementation Consultant | 14 yrs. | | ● | | | ● | ● | ● | | | ● | | | | | | | | ● | ● | | | | | | | | |
| Nick Graf | Implementation Consultant | 10 yrs. | | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Greg Lamy | Implementation Consultant | 2 yr | | ● | | ● | ● | ● | ● | | | ● | | | | | | | | ● | ● | | | | | | | | |
| Michael Becker | Implementation Consultant | 5 yr | | ● | ● | | ● | ● | ● | ● | | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |

Keith Hobday will be the main point of contacts for this engagement and ultimately responsible for all members of the TruePoint team.

- Pull parcel attributes from GIS parcel layer directly into Permits
- Create various reports for high priority needs
- Provide remote training for features that are identified that are not being used
- Other items to be provided as identified as budget exists

## Services Costs

| Tasks | Hours | Rate | Total | Comment |
|---|---|---|---|---|
| As needed support | 120 | $150.00 | 18,000.00 | |
| | | | | |
| Travel Budget | | | $600.00 | |
| Total | | | **$18,600.00** | |

Services will be billed monthly on a T@M hourly basis as work is requested by the County.

## SIGNATURE

Agency acknowledges that it has read this SOW, understands it and agrees to be bound by its terms and conditions. The parties agree that this Agreement cannot be altered, amended or modified, except in writing that is signed by an authorized representative of both parties.

| Accepted<br>Lake County, CA. | Accepted<br>TruePoint Solutions |
|---|---|
| <br><br>By: | By:<br><br> |
| Print Name: | Print Name: Keith Hobday |
| Title: | Title: Partner |
| Date: | Date: 6/18/2022 |

# III. Project Scope

## Project Understanding

TruePoint Solutions appreciates the opportunity to work with the County to enhance the utilization of your Accela Civic Platform products and support the day to day needs of your end users. The Accela Civic Platform is very feature rich and can be continually enhanced to better support your business needs. As we support your needs we will also focus on knowledge transfer of the Accela Civic Platform features.

TruePoint Solutions proposes a blanket as needed support agreement to work with County staff to support and enhance the Accela Automation functionality. TruePoint can advise, configure, support and train all aspects of the Accela Civic platform and currently works with over 60 hosted Accela customers on the Accela East, West and Canadian hosted sites.

## Proposed Services

### As Needed Expert Support and General Maintenance

This service will provide day-to-day as need or on call support above and beyond what is provided by Accela CRC. It will also provide a budget to continually enhance and expand the County's Accela configuration.
- Training as need on any aspect of Accela. Training can be done on-site or remote
- Advise on how to most efficiently configure the Accela Civic Platform based on experience we have gained from over 100 customers
- Misc. Configuration changes as requested
- Scripting for business process automation
- Fee configuration and enhancements
- Report Development and Support using Ad-Hoc or Crystal
- ACA support and enhancements
- Provide ability to convert your current default ACA site to a responsive look that work for all on different form factors including phones.
- Accela Mobile support
- Accela GIS support
- Day-to-day phone support and issue resolution

Specific Priority 1 topics include:
- Setup/finalize cost recovery and billing for the Planning Department
- Configure email notifications when deposit hit certain limits
- Configure Elavon payment capabilities from the Accela ACA portal for all departments (County will need to obtain virtual merchant account from Elavon for credit card or Ach payments)
- Activate and configure Planning module in the Accela Citizen Portal
- Configure Inspection scheduling in the Accela Citizen portal for Building
- Expand ability to accept on-line applications in the Accela Citizen portal