

## ATTACHMENT A

# County of Lake, CA



## On-Going Service and Support Proposal

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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 and has since worked with over 100 Accela clients. Current implementation projects which TruePoint is involved in or completed include:

## TruePoint Civic Platform Clients

Cities	Cities	Counties
<ul style="list-style-type: none"> <li>Alameda, CA</li> <li>Atlanta, GA</li> <li>Asheville, NC</li> <li>Berkeley, CA</li> <li>Ceres, CA</li> <li>Clearwater, FL</li> <li>Cleveland, OH</li> <li>Concord, CA</li> <li>Corvallis, OR</li> <li>El Paso, TX</li> <li>Fort Collins, CO</li> <li>Fremont, CA</li> <li>Grand Rapids, MI</li> <li>Grass Valley, CA</li> <li>Hesperia, CA</li> <li>Indianapolis, IN</li> <li>Lincoln, NE</li> <li>Martinez, CA</li> <li>Maryland Heights, MO</li> <li>McAllen, TX</li> <li>Menlo Park Fire, CA</li> <li>Meridian, ID</li> <li>Missoula, MT</li> <li>Moreno Valley, CA</li> <li>New York City, NY</li> <li>Oklahoma City, OK</li> <li>Omaha, NE</li> <li>Ontario, CA</li> <li>Palo Alto, CA</li> <li>Peoria, AZ</li> <li>Pleasanton, CA</li> <li>Pleasant Hill, CA</li> <li>Reno, NV</li> <li>Rochester, MN</li> </ul>	<ul style="list-style-type: none"> <li>Roseville, CA</li> <li>Sacramento, CA</li> <li>San Antonio, TX</li> <li>Santa Monica, CA</li> <li>Spokane, WA</li> <li>Seattle, WA</li> <li>Stockton, CA</li> <li>Sunnyvale, CA</li> <li>Tacoma, WA</li> <li>Tigard, OR</li> <li>Virginia Beach, VA</li> <li>Visalia, CA</li> <li>Walnut Creek, CA</li> <li>Watertown, WI</li> <li>West Sacramento, CA</li> <li>Westminster, CO</li> <li>Yorba Linda, CA</li> <li>Yuba City, CA</li> </ul>	<ul style="list-style-type: none"> <li>Adams County, CO</li> <li>Arapahoe County, CO</li> <li>Bexar County, TX</li> <li>Boulder County, CO</li> <li>Buncombe County, NC</li> <li>Clackamas County, OR</li> <li>Carroll County, MD</li> <li>Cobb County, GA</li> <li>Contra Costa County, CA</li> <li>Guilford County, NC</li> <li>Gwinnett County, GA</li> <li>Hillsborough County, FL</li> <li>Jackson County, OR</li> <li>King County, WA</li> <li>Maricopa County, AZ</li> <li>Marion County, IN</li> <li>Monterey County, CA</li> <li>Multnomah County, OR</li> <li>Napa County, CA</li> <li>Nevada County, CA</li> <li>Olmstead County, MN</li> <li>Pasco County, FL</li> <li>Placer County, CA</li> <li>Pinal County, AZ</li> <li>Pima County, AZ</li> <li>Sacramento County, CA</li> <li>San Diego County, CA</li> <li>San Mateo County, CA</li> <li>Santa Barbara County, CA</li> <li>Stanislaus County, CA</li> <li>Weld County, CO</li> <li>Washoe County, NV</li> <li>Yakima County, WA</li> </ul>
	<b>Towns</b>	
	<ul style="list-style-type: none"> <li>Elk Grove Village, IL</li> <li>Los Gatos, CA</li> <li>Paradise, CA</li> <li>Queen Creek, AZ</li> </ul>	
	<b>Other Government Agencies</b>	
	<ul style="list-style-type: none"> <li>DC - OSSE</li> <li>CA, Dept. of Water Resources</li> <li>CA - OSHPD</li> <li>State of Massachusetts</li> <li>State of Montana</li> <li>State of New York</li> <li>TRPA-Tahoe Regional Planning Auth.</li> <li>CA State Lands Commission</li> <li>City &amp; County of Denver</li> <li>City &amp; County of San Francisco</li> </ul>	

## Project Understanding

TruePoint Solutions appreciates the opportunity to work with the County of Lake enhancing the utilization of your Accela products and supporting 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 Civic Platform product features.

## II. TruePoint Staff

Maintaining the Civic Platform represents an important technology undertaking for the County. TruePoint will assign talented staff that has in-depth knowledge of your current implementation.

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

## III. Project Scope

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TruePoint Solutions proposes a blanket as needed support agreement to cover all/any aspects of your current Civic Platform functionality and to work with County staff to support and enhance your current functionality.

### Proposed Services

#### Phase 0 - Before Go Live

Work can be done in parallel with current Accela contract as an anonymous consultant.

- Consult/advise County on how to get the most out of the current Accela contract. Schedule at least a weekly 1 hour meeting to review progress and provide advice.
- Review current SOW with County to verify that the County is getting everything they can from their current contract.
- Demo the concept of one Planning Entitlement record to Michalyn ASAP, This approach could be used for all planning cases except CUPA. This could combine many of the BPT's into one record type and have Planning ready at soft go-live.
- Design and create Planning Entitlement Record, workflow, fees since it is outside the 10 record types in the contract (this can also be used to convert Permits Plus Planning data).
- Help county decide how to best convert Permits Plus Building data and create any supporting configuration.
- Help county decide how to best convert Permits Plus Grading Permit data and create any supporting configuration required.

- Help county with final testing for go-live

#### Phase 1 - After Go Live

Current Accela implementation contract is over

- Support County with post go-live activities and basic questions
- Basic cleanup of your current configuration to make screens and layouts look and function nicer for County staff
- Create Over-the-Counter (high volume) building Permit records to be used for specific basic permits (Water Heater, Reroof, etc). These permits can be created and issued from ACA once a payment merchant account is in place.
- Create additional scripts to further automate steps wherever possible
- Provide additional Training (Possible setup weekly 1.5-hour web based workshop)
- Report development and support

We can also support or lead the effort for other larger scale tasks like:

- Implementing Accela Electronic Document Review
- Implementing new Departments or Modules

### Time and Material Costs

Task	Hours	Rate	Cost
<b>As Needed/Requested Services</b>			
Phase 0 - Services	80	\$150	\$12,000
Phase 1 - Services	200	\$150	\$30,000
Travel and Expenses as Incurred if needed including for on-site support			\$1,200
Total Estimate			<b>\$43,200</b>

## IV. Billing Policies and Procedures

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Services time will be billed monthly as work is requested by the County. The County may terminate the services agreement at any time in writing.

If Travel is required actual travel expenses will be billed as incurred.

## V. Signatures and Approvals

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Both parties acknowledge 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 By: County of Lake	Accepted By: TruePoint Solutions, LLC.
By:	By:
Print Name:	Print Name:
Title:	Title:
Date:	Date: