



EPLAN LIFE CYCLE

# City of Bakersfield, CA

## ProjectDox® ePlan Life Cycle Solution Proposal

January 31, 2020



### Prepared by your Avolve Software Representative

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## Quote Delivered To

Phil Burns  
1715 Chester Avenue  
Bakersfield, CA  
93301

Building Director  
pburns@bakersfieldcity.us

City of Bakersfield, CA  
(661) 326-3040

Date of Quote: 1/20/2020

Quote Valid Until: 3/20/2020

## ProjectDox ePlan Solution Pricing Agreement

### SAAS

Product Name	Product Code	Description	Qty	Unit Price	Total Price
Test Environment Entry-Level Capacity OAS & ProjectDox SaaS License	SAAS-T.E	<p>Software as a Service (SaaS) for OAS &amp; ProjectDox on a Test Environment with 3 virtual server-configuration. Designed for organizations who plan to use the system for development and/or testing with approximately 25 concurrent users and approximately 2,000 permits per year.</p> <p>Software included for Production:</p> <ul style="list-style-type: none"> <li>• ProjectDox Software Subscription</li> <li>• Unlimited Workflow license</li> <li>• OAS Software Subscription</li> <li>• Includes unlimited Application Forms license</li> <li>• Includes SSA for six base forms preconfigured</li> </ul> <p>Services included for SaaS Production:</p> <ul style="list-style-type: none"> <li>• Set up and installation of OAS &amp; ProjectDox</li> <li>• 24x7 Managed services</li> <li>• Annual ProjectDox and OAS upgrades</li> <li>• Technical Support</li> </ul> <p>Test Environment Safeguard: Avolve security policy limits access to the Test environment. External users including the customer's IT can be provided limited VPN access to the Test servers and database such as creation and testing of custom reports. VPN access will be made available upon request.</p> <p>Includes SSA for six base forms preconfigured.</p> <p>See Hardware Configuration section. Additional capacity requirements are available upon request.</p>	12.00	\$1,700.00	\$20,400.00

Production Environment Entry-Level Capacity OAS & ProjectDox SaaS License	SAAS-P.E	<p>Software as a Service (SaaS) for OAS &amp; ProjectDox on a Production Environment with 6 virtual server-configuration. Designed for organizations who have approximately 150 concurrent users and 7,000 permits per year.</p> <p>Software included for Production:</p> <ul style="list-style-type: none"> <li>• ProjectDox Software Subscription</li> <li>• Unlimited Workflow license</li> <li>• OAS Software Subscription</li> <li>• Includes unlimited Application Forms license</li> <li>• Includes SSA for six base forms preconfigured</li> </ul> <p>Services included for SaaS Production:</p> <ul style="list-style-type: none"> <li>• Set up and installation of OAS &amp; ProjectDox</li> <li>• Managed services</li> <li>• Annual OAS &amp; ProjectDox upgrades</li> </ul> <p>Production Environment Safeguard: Avolve security policy limits access to the Production environment. External users including the customer's IT will not be allowed direct access to the Production servers and database. Any development or testing can be performed on the Test environment.</p> <p>See Hardware Configuration section. Additional capacity requirements are available upon request.</p>	12.00	\$9,605.00	\$115,260.00
File Transport Manager (FTM) Subscription	SUB-PA-FTM	<p>File Transfer utility subscription for plan files and documents, automated PlansAnywhere Site creation:</p> <ul style="list-style-type: none"> <li>- Installs on ProjectDox App Server</li> <li>- Maps data fields to PlansAnywhere</li> <li>- Maps Files to designated PlansAnywhere categories</li> <li>- Transfers files to cloud storage</li> </ul>	1.00	\$8,500.00	\$8,500.00
PlansAnywhere Test License Subscription (3 Users)	SaaS-PA-TEST	<p>PlansAnywhere Test License Subscription</p> <ul style="list-style-type: none"> <li>- Maximum 3 Users</li> <li>- 1 year term</li> </ul>	1.00	\$1,989.00	\$1,989.00
PlansAnywhere License Pack (20 Users)	SOFT-PALP	<p>PlansAnywhere License Pack</p> <ul style="list-style-type: none"> <li>- Maximum of 20 users</li> <li>- 1 year</li> <li>- Internet Browser on Chrome, Safari, Firefox and Internet Explorer</li> <li>- iOS App</li> <li>- Admin Dashboard and Client</li> </ul>	1.00	\$13,260.00	\$13,260.00
<b>SaaS Sub-Total:</b>					<b>\$159,409.00</b>

## TRAINING

Product Name	Product Code	Description	Qty	Unit Price	Total Price
Introduction to ProjectDox	TES-INTRO	The Training and Educational Services course includes a flexible mixture of lecture and hands-on lab time to familiarize the user with the basic features of ProjectDox. This 3 hour instructor lead course will review how to access a project, view a file, use the search feature and communication tools to efficiently use and communicate using the ProjectDox application. This course is limited to a max of 12 persons per session/course.	2.00	\$1,012.50	\$2,025.00
Introduction to Marking Up in ProjectDox	TES-MARK	This 4 hour course is designed for plan review professionals responsible for marking up documents electronically. Skills learned will include but are not limited to basic viewing and measurement tools, how to create and edit markups, overlay and compare files.  This course is limited to a max of 12 persons per session/course.	3.00	\$1,215.00	\$3,645.00
Workflow PDox Training for Plan Reviewers	TES-BICPR	This course is designed to provide the plan reviewers with the knowledge of the e-plan review process and their role within it. Skills learned will include understanding how users will be notified, accept and complete plan review tasks.  This course is limited to a max of 12 persons per session/course.	3.00	\$1,800.00	\$5,400.00
Workflow Business Process Training for Coordinating Staff	TES-BICCOR	This course is designed to provide the coordinating staff (intake/permit techs, coordinators, administrators, etc.) with the knowledge of the e-plan review process and their role within it. Skills learned will include understanding how users will be notified, accept and complete tasks, check status of the review and provide management of assigned users (based on defined role).  This course is limited to a max of 12 persons per session/course.	1.00	\$1,800.00	\$1,800.00
PlansAnywhere - Group Training	TES-PA-TRA	PlansAnywhere Training up to 20 Users - 1 training session, scheduled, delivered online	1.00	\$1,080.00	\$1,080.00
Training Sub-Total:					\$13,950.00

## PROFESSIONAL SERVICES

Product Name	Product Code	Description	Qty	Unit Price	Total Price
SaaS ProjectDox Professional Services and Training	SaaS-PS-PDOX-4	<p>ProjectDox Professional Services for SaaS implementation of 1 ProjectDox workflow: Building</p> <ul style="list-style-type: none"> <li>• Setup</li> <li>• Orientation and Configuration Requirements Session</li> <li>• Configuration &amp; Integration (Base Integration Services)</li> <li>• User Acceptance Testing</li> <li>• Soft Launch</li> </ul> <p>Training:</p> <p>End User Package:</p> <ul style="list-style-type: none"> <li>• 2: Introduction to ProjectDox</li> <li>• 1: Introduction to Marking Up in ProjectDox</li> <li>• 1: Workflow Business Process Training for Plan Reviewers</li> <li>• 1: Workflow Business Process Training for Coordinating Staff</li> </ul> <p>Administration Package:</p> <ul style="list-style-type: none"> <li>• 1: Project Administration</li> <li>• 1: System Administration</li> </ul> <p>Rollout Package:</p> <ul style="list-style-type: none"> <li>• 1: Pilot Workshop Class</li> <li>• 1: Community Outreach Class</li> </ul>	1.00	\$50,535.00	\$50,535.00
Onboarding Advanced PF Integration	PS-PF.AINT.ON BRD	<p>Navline Integration</p> <p>Initial Services for Onboarding Advanced ProjectFlow Integration includes the below; additional quote may be required if scope changes during Analysis:</p> <ul style="list-style-type: none"> <li>• Project Creation - Configuration of the Avolve Project Creator Service to create a project in ProjectDox based on defined values from the permitting system. These include: <ul style="list-style-type: none"> <li>- Permit/Project Number</li> <li>- Description</li> <li>- Applicant/Submitter First Name</li> <li>- Applicant/Submitter Last Name</li> <li>- Applicant/Submitter Email</li> <li>- Project/Case Type</li> <li>- Display of Permit/Application Information</li> <li>- Configuration of General Permit/Applicant/Contractor application data fields for display within ProjectDox via a web page/formlet.</li> <li>- Project/Permit Status Update - ProjectDox will notify the permitting system that the plan review workflow is complete when all reviews are approved</li> </ul> </li> </ul>	1.00	\$18,000.00	\$18,000.00

		PLUS: • Update assigned Review Tasks - ProjectDox will update Permitting System upon Plan Reviewer task completion				
Base Archival Services	PS-BA	Laserfiche Integration Base Archival Services Include: - Automated Export of approved and stamped plans and documents to a shared directory. - Includes a maximum two workflow activities to export the plans and documents from two folders to a shared directory	1.00	\$9,000.00		\$9,000.00
Best-in-Class Level 1 ProjectFlow PLUS Services	PS-BIC.L1PLUS	BIC Plus Setup Services Level 1 for Workflows: Planning	1.00	\$27,540.00		\$27,540.00
Best-in-Class Level 2 ProjectFlow CORE Services	PS-BIC.L2COR E	BIC Core Setup Services Level 2 for Workflows: - Walk Thru Plan Review	1.00	\$10,125.00		\$10,125.00
Best-in-Class Level 1 ProjectFlow CORE Services	PS-BIC.L1COR E	BIC Core Setup Services Level 1 for Workflows: - Engineering Review	1.00	\$14,175.00		\$14,175.00
OAS Setup & Training Services	PS-OAS.SUT	Setup Services: - System Setup - Database Table Population - mapping control id's to export records - Admin Training - not to exceed 5 hrs	1.00	\$3,847.50		\$3,847.50
OAS SSA Template Setup	PS-OAS.SSA	Deploy SSA templates/permit letters, assist design and deploy to production – not to exceed 16hrs	1.00	\$3,240.00		\$3,240.00
OAS eForm Paper to eForm Services	PS-OAS.P2eF	Existing paper to electronic form design in OAS with < 75 fields and intelligent conditional entry/display	1.00	\$1,215.00		\$1,215.00
OAS Basic eForm Services	PS-OAS.BeS	< 75 fields – w/ intelligent conditional entry/display	1.00	\$3,240.00		\$3,240.00
OAS Advance eForm Services	PS-OAS.AeS	>75 fields to 150 fields –intelligent conditional entry/display	1.00	\$4,860.00		\$4,860.00
OAS Payment Processor	PS-OAS.PP	Integration Dev services & Engineering (core product changes may be required) 80-100hrs	1.00	\$16,200.00		\$16,200.00
OAS eForm Base Validation	PS-OAS.BV	Professional Services for eForm Base Validation Integration	2.00	\$3,240.00		\$6,480.00
PlansAnywhere OnBoarding	PS-PA-ONBRD	PlansAnywhere/FTM Dev Set-up & Configuration - Development instance standard set-up and config - Initial Training (Dev Org-up to 3 persons) - FTM standard setup, configuration and test	1.00	\$7,199.00		\$7,199.00
Assurance Services	PS-AS	45 Hours of Assurance Services - Invoiced monthly as used \$225/hour.	1.00	\$10,125.00		\$10,125.00
<b>Professional Services Sub-Total:</b>						<b>\$185,781.50</b>



<p>Unless otherwise stated, pricing does not include any applicable taxes that may be applied at invoicing. Travel and Expenses are not included in this total and will be invoiced as incurred.</p> <p>First year SaaS and 20% of Services shall be invoiced upon execution of Agreement. Payment for the total amount is due net thirty (30) days from the date of initial invoice. Payment via EFT. See notes for details.</p> <p>This best approach package to implementation relies on partnership with the jurisdiction to achieve desired go-live and paperless goals. To that end a not to exceed 927 hours have been allocated to services and training on this project. In the event scope expands or delays account for incremental hours to be required, a Change Request(s) will be issued for the incremental costs associated with delay or expansion.</p> <p><b>Year 2 SaaS and Cloud Hosting Services = \$159,409</b></p> <p><b>Year 3 SaaS and Cloud Hosting Services = \$159,409</b></p> <p>Three-year commitment. Yearly SaaS usage audit may result in an increase or decrease in subscription based on cloud consumption.</p>	<b>Grand Total:</b>	<b>\$359,140.50</b>
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**Notes:**

**EFT Remittance:**

Avolve Software / Compass Bank  
Routing #: 122105744  
Account #: 2519753300

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

By signing this Order Form customer acknowledge and agrees to, if purchasing (a) licenses and/or support and maintenance, Avolve's Software License and Support Agreement General Terms and Conditions and Avolve's Maintenance and Support Level Agreement; (b) professional services, Avolve's Professional Services Agreement; and (c) training services, the Avolve University Training Terms and Conditions; and (d) hosting services, Avolve's Hosting Service Level Agreement. Customer acknowledges that it has been provided reasonable access to the applicable documents listed herein online at [www.avolvesoftware.com](http://www.avolvesoftware.com) and knowingly consents to the same. Resellers acknowledge that they will have end users formally acknowledge and be bound by all applicable Avolve Terms and Conditions as described above.

# City of Bakersfield, CA

## ProjectDox® ePlan Life Cycle Solution

City of Bakersfield, CA  
("Customer")  
Statement of Work

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January 31, 2020



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Phone: 602.714.9774 [www.avolvesoftware.com](http://www.avolvesoftware.com)



## EXECUTIVE SUMMARY

This Statement of Work will focus on the Setup of a Production and Test Environment and the implementation of ProjectDox Best in Class workflows addressing the Customer's needs with regard to Four (4) Best in Class plan review processes. The goal is to implement Online Application Submission (OAS), ProjectDox and Base permitting system integration for ProjectDox utilizing web services, in a standardized, off the shelf manner. We will leverage Avolve best practices and built-in configuration and modifications features, to meet the most effective functionality required to achieve the highest business value for the customer (the "Project").

## SCOPE OF WORK (MILESTONES)

### Setup

Offsite | Remote

Setup of a single environment with VPN connection to allow for IBM iSeries communication between Avolve Cloud and Naviline for the applicable products is required prior to orientation and configuration onsite assessments being conducted. Project pre-planning, including draft project plan, communication plan etc. are associated to this stage of the project. Additional environments to be implemented will be factored into the project plan and based on the sales order/agreement.

- Provisioning of all applicable products and modules as specified on the Purchase Agreement/Sales Order. The date of acceptance for this milestone is the **SaaS Renewal Date**.

### Orientation and Configuration Requirements Session\*

2 persons | Onsite

The Avolve PM will work with the City to perform an initial review of the application with the project team and gather configuration requirements to complete the design of the OAS application forms and Best in Class workflow processes. The output of these sessions will be compiled into a requirements document referred to as the Configuration Requirements Document (CRD). This will include using standard templates and design to expedite the project while providing the best business value to the customer. Any design requirements not available to the core system and/or requiring development will be scoped and presented in a separate Statement of Work. Assurance services afforded the project may be leveraged for work identified as outside the scope of the project.

- ProjectDox Configuration Requirements Document
- Base Integration permitting system touchpoint discussion for Naviline includes:
  - Project Creation – Required application data is pushed from the permitting system to the ProjectDox application using the Avolve provided REST API and configuration of the ProjectDox Windows Service Process. Required field for project creation:
    - Permit Number/Project Name (Key value)
    - Description
    - Applicant/Submitter First Name
    - Applicant/Submitter Last Name
    - Applicant/Submitter Email Address
    - Permit/Project Type
  - Application Data – Pull of data from the permitting system to display of up to 18 read-only permit application data fields within the plan review process.
  - Review Status – Push of data to provide the permitting system the following data related to the plan review:
    - Reviewer Name
    - Reviewer Department
    - Review Cycle
    - Review Status (Approved, Rejected)
    - Date Completed
  - Final Approval Status – Push final status or log event of approved to permitting system API indicating to the permitting system that all reviews are approved in ProjectDox.
- Project Plan (task list/schedule/resource assignments) not to exceed budget



## Configuration & Integration \*

Offsite | Remote

Configuration of applicable software products, forms and the workflows based on the configuration requirements document findings. This includes the development of the integration work defined in this Statement of Work and confirmed during requirements discussions. Integration designs require the City to have or develop web services to allow for integration communication to the target systems from ProjectDox. Direct database calls from are not supported as part of the design.

- Configured Working products and modules as specified in the Purchase Agreement/ Sales Order
  - Configured workflow OAS application
  - Deployment of OAS delivered Self-Service Application (SSA) Forms
    - Provides up to 16 hours of services to configure the site for use with the delivered SSA forms and letters, perform a review of the application forms design and features, make minor modifications and deploy into production.
  - Design of 1 Base OAS Application Forms
    - Form contains less than 75 fields for the design
  - Design of 1 Advanced OAS Application Form
    - Form contains 75-100 fields for the design
  - Design of 1 Paper to Electronic Form
    - Replication of a paper application form to a digital application form in OAS. Form must contain less than 75 fields.
  - OAS Integration
    - OAS Advanced Integration
      - Defined application data to be pushed to the target permitting system API to allow for creation of the permit and triggering of the Project Creation process into ProjectDox. Design requires API's to be available for customer permitting system. Direct database calls from OAS to the target system are not supported.
    - 1 Payment Processing to Paymentus
      - Design the OAS application to interface with Paymentus to allow for online payments through OAS.
    - 2 OAS Base Validation
      - 1 Base Validation allows for the validation for up to 2 data fields in the application form against the target system and confirmation of the data on the application form. (only validates) Design requires web services to be available for integration communication to the target system. Direct database calls from OAS to the target system are not
  - Configured working ProjectDox application
    - 4 Best In Class Workflows
    - Advanced Integration to Naviline
    - Base Archival System Export provides configuration of two folders per workflow to be configured to automatically export from the system the approved plans and documents to a shared location on the customer's network allowing import by Laserfiche.

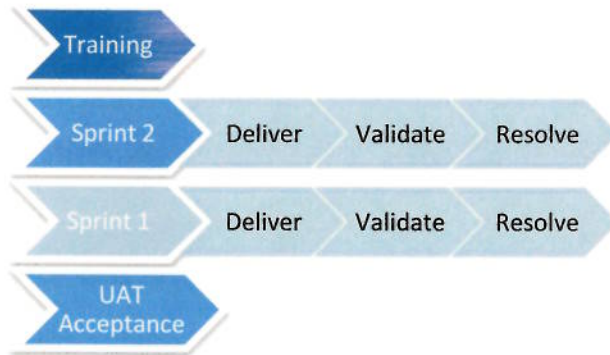
## User Acceptance Training (UAT)

1 Person | Onsite

The UAT phase uses an agile methodology consisting of two sprints of ten days each for testing that include the delivery of the designed process, validation of the design by the Customer and resolution to design issues by Avolve before starting the next sprint. The Avolve team will provide user acceptance training and guidance to the Customer on methods to test the designed process and system to work towards acceptance. Customer will validate the system configuration, forms, emails, integration and document any identified issues in the RIT (Risks, Issues and Tasks) document provided by the Avolve project manager. Avolve will resolve any identified issues to allow the customer retest to gain acceptance.

UAT Training is conducted onsite allowing one day per process with the remainder of the UAT phase supported remotely. During this phase the production environment will be setup. Upon acceptance of the design the Avolve team will coordinate the promotion of the code to the production environment.

- Completion of User Acceptance Testing (UAT)
- Implementation of the Production Environment
- Code Promotion from Test to Production



## Training

1 Person | Onsite

Avolve education specialists will deliver the below courses to the Customers staff. The courses will train approximately **48** persons and will be delivered based on the project plan rollout. A maximum of 12 persons per course is enforced with the exception of the Pilot (TES-PILOT) and Community Outreach (TES-OUT). These sessions are targeted for the design community. The Pilot course allows for hands-on training for up to 10 identified applicants and the Community Outreach session is geared as a demonstration/lecture course to be provided to a large audience to educate and promote the new processes.

It is recommended that training sessions be organized with participants of similar technological abilities to allow for the most efficient delivery and retention of the materials. Additional training above and beyond the below may be added or additional training performed post go-live by leveraging the assurance services funds afforded the project.

- Delivery of classes for all products/modules as purchased – See Purchase Agreement/Sales

### End User Package:

- 4: Introduction to ProjectDox
- 4: Introduction to Marking Up in ProjectDox
- 4: Workflow Business Process Training for Plan Reviewers
- 2: Workflow Business Process Training for Coordinating Staff

### Administration Package:

- 1: Project Administration
- 1: System Administration

### Rollout Package:

- 1: Pilot Workshop Class
- 1: Community Outreach Class

### OAS Training

- Five (5) hours of remote training on the administrative settings within the OAS application and basic configuration/design of the application forms.

- PlansAnywhere – Group Training
  - Plans Anywhere Training up to 20 users – 1 training session, scheduled, delivered online.



#### **Launch/Project Close Out**

1-2 Person |Onsite

Deployment of the workflow processes and post go live support for a period of 5 business days. Customer will be introduced to support post the 5 business day go live period.

#### **Assurance Services**

The assurance services fund may be leveraged at any time during or post project completion to cover additional integration requirements, newly identified out of scope requirements, training, and software not included in this statement of work. The funds may also be used post go-live/launch of a process to keep the project management team engaged to assist with change management and user adoption assistance. Assurance services hours are billed on an hourly basis at a rate of \$225.00 an hour. The use of hours requires a change order or an assurance services agreement that defines the work and has signatures of agreement for use by the Customer.

#### **ACCEPTANCE PROCESS**

There will be Key Deliverables, as identified in the Project Activities/Deliverables Payment Schedule which will be subject to acceptance by the Customer ("Acceptance"). Upon completion of each Key Deliverable, Avolve will request from the Customer a written response within five (5) business days after receipt thereof. Notwithstanding the foregoing or anything to the contrary in the Purchase Agreement, all other Deliverables provided under this Statement of Work shall be deemed to have been accepted by the Customer upon delivery. If Customer does not approve, reasons for rejection must be clearly noted. Avolve will then work with the Customer to come to agreement on obtaining approval. The Customer shall be deemed to accept any such Key Deliverable which Customer does not accept or reject within such period. This acceptance will initiate the invoice of the applicable milestone.

#### **AVOLVE PROJECT PLAN AND PROCESS**

Promptly following execution of this Statement of Work, the parties shall meet to discuss the general project schedule, which will be generally organized around the standard Avolve project On-Boarding process. Within 2 weeks, the initial project plan will be created and sent to Customer. The Project Plan contains a schedule, a list of tasks in a schedule format, assignments of specific team members over specific times and communication status reporting processes. The Project Plan is a living document that will be reviewed throughout the term of this Agreement and may be adjusted as reasonably necessary, as agreed to from time to time by the parties.

#### **PROJECT ASSUMPTIONS AND CAVEATS**

1. This Project was scoped based upon purchase of ProjectDox Best in Class, understanding that the site will be hosted by the Avolve and configured per established Best-In-Class standards. This understanding forms the basis for Avolve's pricing and the Deliverables to be provided under this Statement of Work. Any deviation from these requirements will require a change order and may increase cost or estimated time of Project completion.
2. Customer/Third Party (Central Square) are responsible for the installation of the IBM iSeries drivers on the ProjectDox Web Server to connect directly to the Naviline database.
3. The Avolve team is responsible for the monitoring of the VPN connectivity stability going into the Avolve Cloud. The City is responsible for the monitoring and stability of the VPN connection going into the City's network.
4. Customer is responsible to purchase and provide the NaviLine to ProjectDox APIs and Fusion to provide proper connectivity between all Avolve products and NaviLine.



5. Avolve will have full access to all Project team members from the customer as needed to complete the successful implementation and roll out of ProjectDox. This access may require the team members of the customer to dedicate specific time to specific detailed tasks within the Project Plan. Team member tasks will be more clearly defined during the kickoff and planning sessions and documented in the Project Plan.
6. Customer and its third parties and/or subcontractors will fulfill any hardware/software requirements, as identified to allow communication between Avolve Software and the Customer's permitting system in a timely fashion in order to keep the Project Plan on schedule.
7. Customer and its third parties and/or subcontractors will fulfill any hardware/software requirements, as identified to allow communication between Avolve Software and the Customer's permitting system in a timely fashion in order to keep the Project Plan on schedule.
8. This best approach package to implementation relies on partnership with the jurisdiction to achieve desired go-live and paperless goals. To that end, a not to exceed 927 hours have been allocated to services and training on this project. In the event scope expands or delays account for incremental hours to be required, a Change Request(s) will be issued for the incremental costs associated with delay or expansion. Should the customer cause or contribute to the delay of any Deliverable, Avolve may elect to revise the Project Plan accordingly to compensate for the delay and invoice for any applicable milestone payments to that point of the project.
9. All parties will reasonably prioritize their efforts to meet the Project Plan schedule in order to achieve a rapid roll out model. In doing so, it is understood by all parties that multiple tasks may be in process at one time and Avolve may have more than one Professional Services team member working on the project at one time.
10. Client will provide adequate Project management for their own resources, and/or third parties, to collaborate with Avolve's project manager. Client subject matter experts and applicable users will be accessible and available in a timely fashion and for adequate and reasonable durations. Avolve will make sure that scheduling of interviews and meetings are adequately in advance of these resource allocations.
11. Customizations/Extensions required may result in increased schedule and budget, but only if documented and approved within Assurance Services and/or a Change Request.
12. Avolve is planning to fully leverage ProjectDox as is, utilizing all built in configuration features to meet the business needs.
13. Any optional items chosen in the Purchase Agreement/Sales Order are not included here and would require a modification to this Statement of Work.
14. Customer understands that an ePlan Life Cycle implementation is a very significant digital transformation enterprise project that requires dedicated change management from the Customer's staff. This will be key for the success of the Customer.
15. Work will not begin until an executed copy of all paperwork is complete. Work will begin at the earliest possible date at which Avolve resources and Customer resources are available or as otherwise agreed to.
16. Avolve and Customer agree to cooperate in good faith to complete the Services and Deliverables in a timely and efficient manner.
17. Recording of Avolve provided training or UAT (user acceptance testing) sessions is not permitted.
18. All training classes unless otherwise noted are limited to 12 persons maximum per class



*\*Configuration options are as described by ProjectDox documentation and as evidenced by ProjectDox administration screens. Minor changes to Avolve ProjectDox Best Practices (Best in Class) workflows are changes to activate/deactivate and/or parametrize with variables, existing steps in the Best Practices workflows. Customization of additional products and modules are to be within the bounds and scope of the respective core product(s) and modifications are limited to those that are allowed by core product design.*

#### **CHANGE CONTROL PROCESS**

The "Change Control Process" is that process which shall govern changes to the scope of the Project during the life of the Project. The Change Control Process will apply to new components and to enhancements of existing components. The Change Control Process will commence at the start of the Project and will continue throughout the Project's duration. Additional procedures and responsibilities may be outlined by the Project Manager identified on the signature page to the Agreement and will be included in the Project Plan if mutually accepted.

Under the Change Control Process, a written "Change Request" (attached) will be the vehicle for communicating any desired changes to the Project. It will describe the proposed change; the reason for the change and the effect the change may have on the Project. The Project Manager of the requesting party will submit a written Change Request to the Project Manager for the other parties.

All parties must sign the approval portion of the Change Request to authorize the implementation of any change that affects the Project's scope, schedule or price. Furthermore, any such changes that affect the scope of this SOW, schedule or price will require an amendment to the SOW and/or any other part of the Purchase Agreement.

#### **PRICING, TRAVEL AND EXPENSE**

Pricing and payment terms are as set forth in Purchase Agreement/Sales Order.

Travel and Expenses are estimated to be \$15,000.00 and will be invoiced to customer as incurred.



# PROJECT ACTIVITIES/DELIVERABLES/PAYMENT SCHEDULE

This is a preliminary deliverable and payment schedule that is subject to change based on discussions to occur post the kick-off of the project, provided that both the City and Avolve Software agree to the new terms in writing.

MS#	Deliverable	Description	Acceptance Criteria	Payment Amount
MSO	Contract Execution	First Year SaaS costs 20% Services (to be credited against services milestones below, as completed with exception of Assurance Services)	Contract Signature	\$159,409.00
MSO	Contract Execution		Contract Signature	\$37,156.30
MS1	First Environment Delivered	Delivered Test Environment	<ul style="list-style-type: none"> <li>Project team can log into installed test environment</li> <li>Sign Off Acceptance</li> <li>Signed CRD</li> <li>Sign off Acceptance Document</li> </ul>	\$5,400.00
MS2A	Configuration Requirements Document (CRD) - Building	Compiled configuration design requirements for Process	<ul style="list-style-type: none"> <li>UAT scheduled for Process 1</li> <li>Sign off Acceptance Document</li> </ul>	\$37,647.00
MS3A	Deliver functional OAS & ProjectDox application for Building, including NavLine integration	Deliver and review the design as defined in the CRD document.	<ul style="list-style-type: none"> <li>User Acceptance Testing confirms requirement as agreed to in the CRD</li> <li>Sign Off Acceptance Document</li> </ul>	\$43,047.00
MS4A	User Acceptance Test - Building End User & Admin Training - Building	User Acceptance Testing for Process Complete Delivered Second Environment Complete End User & Admin training - Building	<ul style="list-style-type: none"> <li>User Acceptance Testing confirms requirement as agreed to in the CRD</li> <li>Sign Off Acceptance Document</li> </ul>	\$18,523.50
MS5A	Rollout Training	Conduct Rollout Training	Sign Off Acceptance	\$3,000.00
MS6	Base Archival Services	Deliver and test Laserfiche integration	Sign Off Acceptance	\$9,000.00
MS7	Launch/Go-Live	Process 1 process general availability launch	Process is launched	\$0.00
MS2B	Configuration Requirements Document (CRD) - Planning	Compiled configuration design requirements for Process	<ul style="list-style-type: none"> <li>Signed CRD</li> <li>Sign off Acceptance Document</li> <li>UAT scheduled for Process</li> <li>Sign off Acceptance Document</li> </ul>	\$11,016.00
MS3B	Deliver functional ProjectDox application - Planning	Deliver and review the design as defined in the CRD document.	<ul style="list-style-type: none"> <li>User Acceptance Testing confirms requirement as agreed to in the CRD</li> <li>Sign Off Acceptance Document</li> </ul>	\$11,016.00
MS4B	User Acceptance Test - Planning	User Acceptance Testing for Process	<ul style="list-style-type: none"> <li>User Acceptance Testing confirms requirement as agreed to in the CRD</li> <li>Sign Off Acceptance Document</li> </ul>	\$5,508.00
MS5B	End User Training - Planning	Conduct End User and Process Training	Sign Off Acceptance	\$5,827.50
MS2C	Configuration Requirements Document (CRD) - Walk Through	Compiled configuration design requirements for Process	<ul style="list-style-type: none"> <li>Signed CRD</li> <li>Sign off Acceptance Document</li> </ul>	\$4,050.00
MS3C	Deliver functional ProjectDox application - Walk Through	Deliver and review the design as defined in the CRD document.	<ul style="list-style-type: none"> <li>UAT scheduled for Process</li> <li>Sign off Acceptance Document</li> </ul>	\$4,050.00

MS4C	User Acceptance Test - Walk Through	User Acceptance Testing for Process	<ul style="list-style-type: none"> <li>User Acceptance Testing confirms requirement as agreed to in the CRD</li> <li>Sign Off Acceptance Document</li> </ul>	\$2,025.00
MS5C	End User Training - Walk Through	Conduct End User and Process Training	Sign Off Acceptance	\$3,015.00
MS2D	Configuration Requirements Document (CRD) -- Engineering	Compiled configuration design requirements for Process	<ul style="list-style-type: none"> <li>Signed CRD</li> <li>Sign off Acceptance Document</li> </ul>	\$5,670.00
MS3D	Deliver functional ProjectBox application - Engineering	Deliver and review the design as defined in the CRD document.	<ul style="list-style-type: none"> <li>UAT scheduled for Process</li> <li>Sign off Acceptance Document</li> </ul>	\$5,670.00
MS4D	User Acceptance Test - Engineering	User Acceptance Testing for Process	<ul style="list-style-type: none"> <li>User Acceptance Testing confirms requirement as agreed to in the CRD</li> <li>Sign Off Acceptance Document</li> </ul>	\$2,835.00
MS5D	End User Training -- Engineering	Conduct End User and Process Training	Sign Off Acceptance	\$4,027.50
M/8	PlansAnywhere Onboarding	Complete PlansAnywhere Setup, Initial Training & UAT	Sign Off Acceptance	\$7,199.00
M/9	PlansAnywhere Group Training	Complete PlansAnywhere Group Training	Sign Off Acceptance	\$1,080.00
M10	Assurance Services		Per Signed Agreement/Change Order	\$10,125.00
Total Services & First Year SaaS				\$359,140.50

For the avoidance of any doubt, all right, title and interest in and to the Deliverables (including without limitation the above Key Deliverables), as well as the intellectual property rights to such Deliverables, shall belong to Avolve, subject to the limited license granted to the Customer pursuant to the Licensing Agreement.





**STATEMENT OF WORK ACCEPTANCE**

Once fully executed, this document will become the Statement of Work for the Project defined in this document. Avolve and Customer's signatures below authorizes Avolve to begin the services described above and indicates Customer's agreement to pay the invoices associated with these services delivered as described.


**SOFTWARE ACCEPTANCE DATE AND MAINTENANCE**

Avolve will invoice Customer for Software Maintenance following the Software Acceptance Date and Customer shall pay such invoiced amount pursuant to the terms of the Purchase Agreement/Sales Order. For all subsequent years of Software Maintenance purchased by Customer, invoicing and payments shall be as set forth in the Purchase Agreement/Sales Order.

**AUTHORIZED SIGNATURES**

Avolve Software Corporation

City of Bakersfield, CA

By:   
Name: Gary Morgan  
Title: CFO  
Date: 2/5/2020

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

## EXHIBIT A: CHANGE REQUEST FORM



Avolve Software Change Request Form  
City of Somewhere

**GENERAL INFORMATION**

Change Request # (CR)	
Project/City/County	
Requestor Name	
Description of Change	<i>[Enter a detailed description of the change being requested]</i>
Date Submitted	
Priority	<input type="checkbox"/> Low <input type="checkbox"/> Medium <input type="checkbox"/> High <input type="checkbox"/> Required
Reason for Change Request	<i>[Enter a detailed description of why the change is being requested]</i>
Project Artifacts Impacted	<i>[List other artifacts affected by this change]</i>
Assumptions/Risks	<i>[Document assumptions or comments regarding the requested change]</i>
Comments/Considerations	<i>[Enter additional comments]</i>
Attachments/References	

**ESTIMATES**

Total Estimated Development Hours	<i>[#hrs]</i>	<i>[Enter the hour impact of the requested change]</i>
Total Estimated Development Duration	<i>[#dys]</i>	<i>[Enter the duration impact of the requested change]</i>
Schedule Impact	<i>[WBS]</i>	<i>[Detail the impact this change may have on schedules]</i>
Cost Impact	<i>[Cost]</i>	<i>[Detail the impact this change may have on cost]</i>
Comments/Recommendations		
PM Approval Signature		
Date Signed		
IDS Approval Signature		
Date Signed		

**CITY OF SOMEWHERE AUTHORIZATION**

Customer Approval Signature	
Date Signed	