Los Angeles County
Department of Regional Planning

Planning for the Challenges Ahead

Amy J. Bodek, AICP
Director

June 19, 2018

The Honorable Board of Supervisors
County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, California 90012

Dear Supervisors:

**APPROVE AMENDMENT NO. 4 TO AGREEMENT NO. 78227
FOR THE ELECTRONIC PERMITTING AND INSPECTIONS
COUNTY OF LOS ANGELES SYSTEM
(ALL SUPERVISORIAL DISTRICTS) (3-VOTES)**

CIO RECOMMENDATION: APPROVE [X]

SUBJECT

Joint recommendation by the Department of Regional Planning (DRP) and the Consolidated Fire Protection District of Los Angeles County (Fire District) that the Board of Supervisors (Board) approve Amendment No. 4 (Amendment) to the Electronic Permitting and Inspections County of Los Angeles (EPIC-LA) System Agreement No. 78227 (Agreement) with Tyler Technologies, Inc. (Contractor), to increase the contract amount to expand the County's software license to accommodate the Fire District.

IT IS RECOMMENDED THAT YOUR BOARD:

1. Find that the attached Amendment is exempt from the California Environmental Quality Act (CEQA), pursuant to Section 15378 (b) (4) of the CEQA Guidelines.

2. Approve and instruct the Chair to execute the attached Amendment to the Agreement to expand the use of EPIC-LA and to incorporate workflows from the Fire District and increase the Maximum Contract Sum (MCS) by $2,732,756 from $11,559,509 to $14,292,265, including a 10 percent contingency ($88,924) for unforeseen additional work within the scope of this Amendment, and extend the Agreement for an additional two years, with up to two 1-year renewal options.

3. Delegate authority to the Director of Regional Planning (Director), or her designee,

to approve and execute Amendments or Change Notices to incorporate changes to the Agreement within the scope-of-work and the MCS of $14,292,265.

4. Delegate authority to the Director, or her designee, to terminate the Agreement if, in the opinion of the Director, it is in the best interest of the Los Angeles County (County).

PURPOSE/JUSTIFICATION OF RECOMMENDED ACTION

Land development is the foundation of economic viability in the County and directly affects housing supply. Applications for land entitlements need to satisfy various State and local regulations administered by different County departments, such as DRP, Public Works (DPW), Parks and Recreation (DPR), Fire District (Forester/Fire Warden) and others. Prior to EPIC-LA, the departments utilized different tracking systems to manage their review of the same project, making coordination between departments difficult and resulting in costly delays for project approval.

In 2014, the Board approved the original Agreement to assist DRP in the implementation of its portion of the EPIC-LA system, which supports a comprehensive approach to the County's land entitlement, inspections, and code enforcement. In 2015, the County retained an independent third-party consultant, Gartner, Inc., to assess EPIC-LA and determine whether it was the appropriate technology to comprehensively support other County departments involved in the land entitlement process. The amendments to the Agreement to expand EPIC-LA for DPW in 2015, DPR in 2017 and the proposed Fire District Amendment are supported by Gartner's report as they provide a seamless and cost-effective process for the benefit of our customers and communities.

The Agreement and its Amendments are summarized below:

Agreement	Dept. Added	MCS	Increased Amount
Original	DRP	$2,335,308	-
Amend. No.1	N/A	$2,335,308	$0
Amend. No.2	DPW	$11,268,109	$8,932,801
Amend. No.3	DPR	$11,559,509	$291,400
Amend. No.4	**Fire District**	**$14,292,265**	**$2,732,756**

The timeline of EPIC-LA implementations is shown in Attachment I.

The Fire District's current Electronic Data Permitting Tracking System "eDAPTs" was sunsetted at the beginning of 2018 and no longer receives new patches or updates to support its operating system and hardware changes. While having to rely on temporary

repairs, the Fire District's ability to fully participate in the review of the County's land entitlement applications has been impacted. This proposed Amendment will expand EPIC-LA to include the Fire District's workflows with a target go-live date in 2019.

Implementation of Strategic Plan Goals

The recommended action supports the County's 2016-2021 Strategic Plan Goal III, Realize Tomorrow's Government Today; Strategy III.2, Embrace Digital Government for the Benefit of Our Internal Customers and Communities; and Strategy III.3, Pursue Operational Effectiveness, Fiscal Responsibility, and Accountability. This action integrates the Fire District's workflows into EPIC-LA to establish a seamless land entitlement and permitting process for the benefit of our customers and communities.

FISCAL IMPACT/FINANCING

This Amendment will increase the MCS of the Agreement to $14,292,265 as indicated in the cost breakdown as follows:

Dept.	One-Time Cost	Ongoing Cost - Cumulative (duration)	Pool Dollars	Total
DRP	$1,449,009	$1,431,139 (8 yrs.)	$212,300	$3,092,448
DPW	$6,143,971	$2,615,281 (6 yrs.)	$781,972	$9,541,224
DPR	$243,276	$37,766 (5 yrs.)	$26,491	$307,533
Fire Dist.	$889,242	$372,894 (4 yrs.)	$88,924	$1,351,060
Total	$8,725,498	$4,457,080	$1,109,687	$14,292,265

The costs of EPIC-LA for DRP and DPR are funded by Net County Cost, while DPW and the Fire District fully fund it with building permit revenue and fire prevention fees respectively. Pool dollars are contingencies for unforeseen additional work within the scope of the Agreement.

In addition, EPIC-LA is hosted on an Internal Services Department server system. The full server system cost is estimated to be $262,554 per year and is shared by all user Departments based on the number of licenses each Department holds. The Fire District's share will be about $17,827 per year.

DRP will return to the Board with recommendations for a successor strategy prior to the expiration of the Agreement on June 23, 2022.

FACTS AND PROVISIONS/LEGAL REQUIREMENTS

The initial Agreement to implement DRP's portion of EPIC-LA provided a two-year term beginning June 24, 2014, and ending June 23, 2016, with two 1-year renewal options. Amendment No. 2 to include DPW's was approved on August 4, 2015, to provide a 2-year base contract term extension ending June 23, 2018, with two 1-year extensions thereafter. Amendment No. 3 to include DPR's became effective on November 22, 2016. Amendment No. 4 (Attachment II) will extend the base contract term to June 23, 2020, with two 1-year extensions thereafter, and will become effective upon the date of execution by all parties.

The Amendment is consistent with all applicable Board mandated provisions, including those pertaining to hiring qualified County employees targeted for layoffs, contractor responsibility and debarment, Child Support program, GAIN/GROW participants, Safely Surrendered Baby Law, and the provisions of Paid Jury Service time for Contractor employees.

Chief Executive Office Risk Management and County Counsel have reviewed the Amendment and determined that the provisions do not increase the County's risk exposure nor reduce the Contractor's performance obligations under this Agreement. County Counsel has approved the proposed Amendment as to form.

Chief Information Office (CIO) has reviewed this request and recommends approval. The CIO Analysis is attached (Attachment III).

ENVIRONMENTAL DOCUMENTATION

The services provided through this Agreement and its Amendments will not have an effect on the environment and, therefore, this Amendment is exempt from CEQA, pursuant to Section 15378 (b) (4) of the CEQA Guidelines.

IMPACT ON CURRENT SERVICES (OR PROJECTS)

Approval of the proposed Amendment for EPIC-LA will enhance our customers' experience by providing a more streamlined and transparent land entitlement application process. The Contractor is dedicating additional resources to assist the Fire District and there will be no negative impact to the DRP, DPW, or DPR projects.

CONCLUSION

Upon approval of this Amendment, the Fire District will be able to move forward with its implementation of an integration into EPIC-LA, which will greatly enhance the County's

land entitlement process by providing an improved customer experience, reducing costs, and promoting greater government accountability and transparency.

Respectfully submitted,

Amy J. Bodek, AICP
Director

Daryl L. Osby
Chief, Forester & Fire Warden

Reviewed by:

William S. Kehoe
Chief Information Officer

AJB:JH:HC:ia

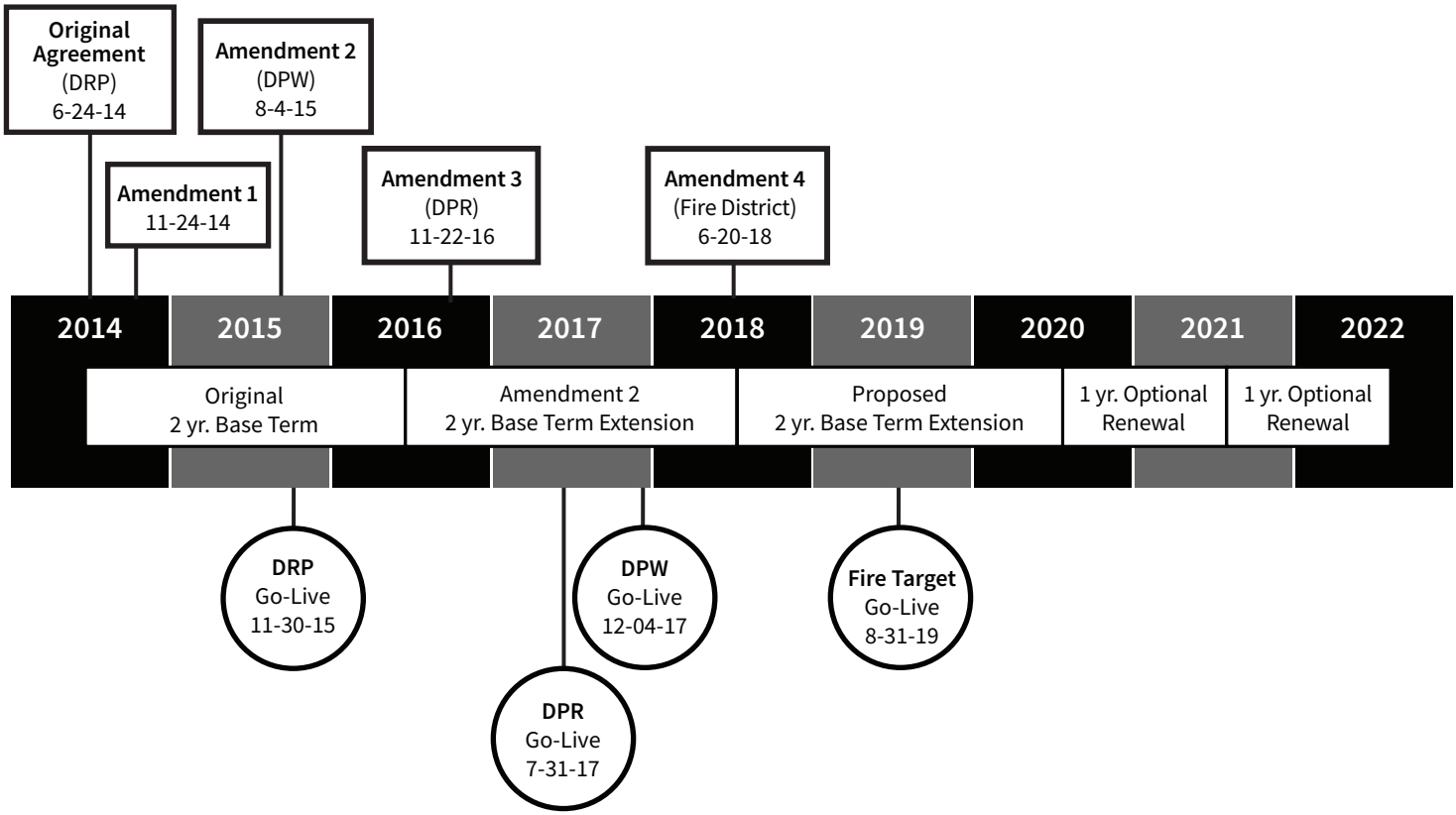
Attachments

c: Executive Office, Board of Supervisors
Board Deputies
Chief Executive Office

County Counsel
Parks and Recreation
Public Health
Public Works

S_IFS_06192018_BL_EPICLA NO4

ATTACHMENT I


Original Agreement (DRP) 6-24-14
Amendment 1 11-24-14
Amendment 2 (DPW) 8-4-15
Amendment 3 (DPR) 11-22-16
Amendment 4 (Fire District) 6-20-18
2014
2015
2016
2017
2018
2019
2020
2021
2022
Original 2 yr. Base Term
Amendment 2 2 yr. Base Term Extension
Proposed 2 yr. Base Term Extension
1 yr. Optional Renewal
1 yr. Optional Renewal
DRP Go-Live 11-30-15
DPR Go-Live 7-31-17
DPW Go-Live 12-04-17
Fire Target Go-Live 8-31-19

ATTACHMENT II

AGREEMENT BY AND BETWEEN COUNTY OF LOS ANGELES AND TYLER TECHNOLOGIES, INC. FOR THE ELECTRONIC PERMITTING AND INSPECTION SYSTEM FOR THE COUNTY OF LOS ANGELES

CONTRACT NO. 78227

AMENDMENT NO. 4

THIS AMENDMENT is made and entered into this_____day of_____, 2018,

by and between	COUNTY OF LOS ANGELES (hereafter "County").
and	TYLER TECHNOLOGIES, INC. (hereafter "Contractor")

WHEREAS, reference is made to Contract No. 78227 entitled, "Agreement by and between County of Los Angeles and Tyler Technologies, Inc. for the Electronic Permitting and Inspection System for the County of Los Angeles" (hereinafter known as the "Agreement"), dated June 24, 2014;

WHEREAS, the Agreement was amended on November 24, 2014, to clarify and update provisions allowing for the scope of the Agreement to be extended to other County Departments ("Amendment No. 1");

WHEREAS, the Agreement was amended on August 4, 2015, to expand the County's license of the Application Software to new Users from the County's Department of Public Works ("DPW"), and to purchase Services for the benefit of DPW ("Amendment No. 2");

WHEREAS, the Agreement was amended on November 22, 2016, to expand the County's license of the Application Software to new Users from the County's Department of Parks and Recreation ("DPR"), and to purchase Services for the benefit of DPR ("Amendment No. 3");

WHEREAS, the Parties desire to extend the Initial Term until June 24, 2020 while retaining the optional two one-year extension terms.

WHEREAS, pursuant to the County's Request for Proposals for the PALMS Implementation Project titled RFP-DRP-1013, the County's Consolidated Fire Protection District of Los Angeles County (District) seeks to expand the County's license of the Application Software to new Users, as defined in this Amendment No. 4, and to purchase Services for the benefit of the District, all on the terms set forth in the Agreement and customized as necessary herein to the District;

WHEREAS, it is also the intent of the parties hereto to amend the Agreement to add and amend other definitions and provisions to the Agreement, and

WHEREAS, the Agreement provides a process for Amendments.

NOW, THEREFORE, the parties agree as follows:

1. This Amendment No. 4 shall become effective upon date of execution by all parties ("Amendment No. 4 Effective Date").

2. All defined terms set forth herein shall have the meaning set forth in the Agreement, unless specifically defined otherwise.

3. For the purposes of this Amendment No. 4, all rights extended to the Department of Regional Planning ("DRP") in the Agreement shall also be extended to District, as set forth herein. Unless expressly stated otherwise, all provisions of this Amendment No. 4 shall apply only to the District.

4. The term "Business Day" (Agreement, Paragraph 2 (Definitions), subparagraph 2.13) shall mean Monday through Friday, excluding County or Contractor observed holidays, unless stated otherwise herein.

5. The term "Implementation Services" (Agreement, Paragraph 2 (Definitions), subparagraph 2.29) shall mean those Services to be provided to District by Contractor as part of the Application Software implementation for the Users added via this Amendment No. 4, as further outlined in Exhibit A-2 (Statement of Work – Fire Department, and detailed in Attachment A-2.1 (Project Plan - Fire) and Exhibit C-4 (Pricing and Payment Schedule - Fire).

6. The term "Project Schedule" (Agreement, Paragraph 2 (Definitions), subparagraph 2.40) shall mean the estimated timeline for the delivery of Implementation Services to Fire, set forth in Exhibit D-2 (Project Schedule – Fire).

7. "Reviewing Agencies" (Agreement, Paragraph 2 (Definitions), subparagraph 2.42) shall mean those County agencies who, in the normal course of business, have the need to access and/or review the permitting and inspection records that are generated by, or originate from, the DRP, the DPW, DPR, District, or the Contract Cities using the Application Software.

8. Subparagraph 4.6 (Access to County Facilities) shall mean:

Contractor, its employees and agents may be granted access to the District's facilities, with prior notification to County's Project Manager, for the purpose of performing Work. Access shall be restricted to County's normal business hours

(7 AM – 5 PM PST Monday through Friday). Access outside those hours must be approved in advance by County's Project Manager, which approval will not be unreasonably withheld. Contractor shall have no tenancy or other property rights in County facilities. Contractor shall provide each member of Contractor staff performing Work at a County facility with a photo identification badge bearing the Contractor logo and the Contractor staff name. Contractor staff shall maintain these badges on their person at all times when performing work at a County facility, and shall be accompanied by County personnel at all times, unless otherwise approved by County's Project Manager.

9. Subparagraph 11.9 of the Agreement (Version Control) shall apply to DRP, DPW, DPR, and the District.

10. "Users" (Agreement, Paragraph 2 (Definitions), subparagraph 2.54) shall mean the County's authorized users at the District and Reviewing Agencies who are authorized to access or use the Application Software pursuant to the Agreement and this Amendment No. 4.

11. Subparagraph 7.1 of the Agreement (Initial Term), shall be replaced by the following provision, applicable to DRP, DPW, DPR, and the District.

    The term of this Agreement shall commence on the Effective Date and shall expire six (6) years thereafter (hereinafter "Initial Term"), unless sooner terminated or extended, in whole or in part, as provided in this Agreement.

12. Subparagraph 8.1 of the Agreement (Contract Sum) shall be replaced by the following and shall apply to DRP, DPW, DPR, and the District:

    The Contract Sum under this Agreement shall be the total fees payable by County to Contractor for supplying all the Application Software, Services and any Third Party Products. The Contract Sum authorized by County hereunder shall not exceed fourteen million two-hundred ninety-two thousand two hundred and sixty-five dollars ($14,292,265) as further detailed in Exhibits C-1, C-2, C-3 and C-4 (Pricing and Payment Schedules – DRP, DPW-BSLD, DPR, and Fire), unless the Contract Sum is modified pursuant to a duly approved Amendment pursuant to Paragraph 5.3.

13. Exhibit A-3 (Statement of Work – Department of Fire; Attachment A-3.1 (Project Plan – Fire); Exhibit C-4 (Pricing and Payment Schedule – Fire); and Exhibit D-3 (Project Schedule – Fire) are each added to the Agreement and incorporated by reference as if fully set forth therein, as set forth in this Amendment No. 4.

14. An Exhibit E-3 (Administration of Agreement – Fire) shall be prepared during kick-off of the Fire Implementation Services, as set forth in Paragraph 4.1 of the Agreement.

15. Contractor's obligations pursuant to this Amendment No. 4 are contingent upon County's payment to Contractor of the fees set forth in Exhibit C-4 (Pricing and Payment Schedule - Fire) and invoiced by Contractor.

16. As of the Amendment No. 4 Effective Date, the parties agree that the total number of District Users shall not regularly or meaningfully exceed the named user counts set forth in Exhibit C-4.

17. For the avoidance of doubt, pursuant to this Amendment No. 4, Contractor agrees that the License provided in Paragraph 11 (License) of the Agreement extends to the Users defined in this Amendment No. 4, at the rates set forth in Exhibit C-4. In addition, Contractor will provide Maintenance and Support Services to District and the Users defined herein on the terms set forth in Exhibit B (Maintenance and Support) to the Agreement and at the prices set forth in Exhibit C-4 to this Amendment No. 4.

18. For the sake of clarity and consistency, with respect to the Agreement and all amendments thereto, the following forms shall serve as templates for the transactions considered by the nature of each of the following: Acceptance Sign Off Form (Exhibit F, Schedule 1), Change Order Request Form (Exhibit F, Schedule 2), and Custom Programming Request Form (Exhibit F, Schedule 3).

19. So long as the County pays then-current Maintenance and Support Fees for District, then for each of the two (2) years following the Amendment No. 4 Effective Date, Contractor will provide the County with one (1) complimentary pass (which is in addition to any passes that may be granted in connection with DRP, DPW and/or DPR) to Contractor's annual user conference. Travel fees and related expenses are the responsibility of the County.

20. Contractor warrants that the pricing extended to County pursuant to this

Amendment No. 4 is the most competitive Contractor pricing for entities of similar size and circumstance to the County purchasing the License rights and Services set forth in this Amendment No. 4.

21. The following provision shall be added to the Agreement as paragraph 63:

Compliance with the County's Zero Tolerance Policy on Human Trafficking

Contractor acknowledges that the County has established a Zero Tolerance Policy on Human Trafficking prohibiting contractors from engaging in human trafficking.

If a Contractor or a member of Contractor's staff is convicted of a human trafficking offense, the County shall require that the Contractor or member of Contractor's staff be removed immediately from performing services under the Contract. County will not be under any obligation to disclose confidential information regarding the offenses other than those required by the law.

Disqualification of any member of Contractor's staff pursuant to this paragraph shall not relieve Contractor of its obligation to complete all work in accordance with the terms and conditions of this Contract.

22. Except for the changes set forth herein above, Agreement shall not be changed in any respect by this Amendment No. 4.

IN WITNESS WHEREOF, the Board of Supervisors of the County of Los Angeles has caused this Amendment to be subscribed by its Director for the Department of Regional Planning and Consolidated Fire Protection District of Los Angeles County, and Contractor has caused this Amendment to be subscribed in its behalf by its duly authorized officer, the day, month and year first above written.

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SIGNATURES FOLLOW

COUNTY OF LOS ANGELES

By_____
Sheila Kuehl
Chair of the Board of Supervisors

COUNTY OF LOS ANGELES

By_____
Director of Planning

COUNTY OF LOS ANGELES

By_____
Fire Chief, Forester & Fire Warden

TYLER TECHNOLOGIES, INC.
Contractor

_____
Signature

By_____
Printed Name

Title_____

APPROVED AS TO FORM:

MARY C. WICKHAM
County Counsel

By_____
Michael Owens
Deputy County Counsel

COUNTY OF LOS ANGELES

By_____
Sheila Kuehl
Chair of the Board of Supervisors

COUNTY OF LOS ANGELES

By_____
Director of Planning

COUNTY OF LOS ANGELES

By_____
Fire Chief, Forester & Fire Warden

TYLER TECHNOLOGIES, INC.
Contractor

_____
Signature

By Abigail Diaz
Printed Name

Title Chief Legal Officer

<u>Exhibit A-3</u>

Statement of Work

Fire

The following principles and documented processes are substituted for Paragraph 1.1 of the Consolidate Fire Protection District Statement of Work, provided at Exhibit A-3 to the Agreement. This substituted Paragraph 1.1 shall apply only to the District.

1.1 – Purpose, Goal, and Outcomes

The District stated purpose is to identify, analyze, and implement improvements to its subdivision review- related business processes and supporting technologies that will increase the effectiveness and efficiency of the County's land entitlement, permitting, and other land management functions to achieve the same goals set in this Paragraph 1.1. Specifically, the goal of this project is to improve District ability to implement the Los Angeles County Fire Code (Title 32).

To accomplish this goal, the functionality must be able to:

- Determine and track land development, fire engineering, forestry, and environmental Impact reviews as outlined in the District: Title 32.
- Ensure that fees are collected and reconciled to specific District fees where they are collected within one year of permit application.
- Integrate the District into the EPIC-LA system, which the County is using to track permit processing and streamline the workflows of County departments involved in permitting review.

The District has the following desired outcome: Functionality that will offer the core functions of the existing eDAPTS database as well as various added features to improve the District's ability to implement Title 32.

The core functions required are the abilities to:

- Determine and track Title 32 obligations related to environmental review, land development, and permitting.
- Reference and update attributes of the District's GIS layer.
- Generate the District's obligation reports for individual permitting projects.
- Generate fee collection, allocations, and summary reports by permit number or case file and geography (unincorporated areas, Fee for Service City contract cities, and Supervisorial District).
- Use shared data from EPIC-LA such as application information to create District reports.
- Provide fields for District's staff to enter data from eCAPS to track fee collections and provide current information on the availability of funds for each fee.
- Submit documents online by the applicant.
- Provides the District's electronic comments and clearances to DPW, DRP, and DPR (This function is already available through EPIC-LA.)
- Pay EPIC-LA fees online using credit cards and eChecks.

The District has complied the following, Title 32 and the enclosed Permit lists, that will be helpful in developing the new eDAPTS replacement.

During Stage 2 ("Assess and Define") as defined in the Project Plan, Tyler Technologies shall review all of the above documents and work collaboratively with District staff to clearly define the specific scope of work for the project.

Exhibit A-1 in Amendment No. 4 included a listing of the required permit/plan types and interfaces to be created within the scope of Amendment No. 4. Listed below are those permits/plan types that the District is involved in as part of its Tentative Map Review and Final Map Review Workflows.

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Category	Permit /Plan	Description Initiator
	LAND DEVELOPMENT UNIT	
Entitlement	Clean Hands Waiver	DRP
Entitlement	Conditional Use Permit	DRP
Entitlement	Conditional Use Permit – Revised	DRP
Entitlement	Fire Hydrant Approval	FD
Entitlement	Grading Plan Approval	DPW
Entitlement	Grant of Waiver	DRP
Entitlement	Lot Line Adjustment	DRP
Entitlement	Mobile Home Park Review	DRP
Entitlement	One Stop Meeting	DRP
Entitlement	Exhibit "A"	DRP
Entitlement	Exhibit "A" – Revised	DRP
Entitlement	Street Vacation	DPW
Entitlement	Tentative Parcel Map – Initial	DRP
Entitlement	Tentative Parcel Map – Revised	DRP
Entitlement	Tentative Parcel Map – Amended	DRP
Entitlement	Tentative Parcel Map – Revision/Revised	DRP
Entitlement	Parcel Map – Final Map – Initial 3	DPW
Entitlement	Parcel Map – Final Map – 4 & Subsequent	DPW
Entitlement	Parcel Map – Verification of Conditions	DPW
Entitlement	Tentative Tract Map – Initial	DRP
Entitlement	Tentative Tract Map – Revised	DRP
Entitlement	Tentative Tract Map – Amended	DRP
Entitlement	Tentative Tract Map – Revision/Revised	DRP
Entitlement	Tract Map – Final Map – Initial 3	DPW
Entitlement	Tract Map – Final Map - 4 & Subsequent	DPW
Entitlement	Tract Map – Verification of Conditions	DPW
Entitlement	Water Appeals Board	FD
Entitlement	Water Plans & Systems Review for Compliance	DPW/FD
Entitlement	Zone Change	DRP
	FORESTRY UNIT – FUEL MODIFICATION PLAN CHECK	
Entitlement	Barns, Garages, Accessory Structures	FD
Entitlement	New Residential Structures greater than or Equal to 2500 s.f. within developing tracts of 25 or more lots	FD
Entitlement	New Residential, Commercial, or Industrial Structures greater than or equal to 2500 s.f. total area which increase by 50% or more, not exceeding 2500 s.f.	FD
Entitlement	New Residential, Commercial, or Industrial Structures less than 2500 s.f. or additions, modifications to existing structures	FD

	50 percent or greater; less than 2500 s.f.	

ENGINEERING UNIT

Entitlement	Assembly Occupancy	FD
Entitlement	Commercial Occupancy (B, F, S, M)	FD
Entitlement	Dwelling 1 & 2 Family	FD
Entitlement	Educational / Institutional Occupancy	FD
Entitlement	Hazardous Materials Review (1-50 Chemicals)	FD
Entitlement	Hazardous Materials Review (51-100 Chemicals)	FD
Entitlement	Hazardous Occupancy	FD
Entitlement	High Piled Combustible Storage	FD
Entitlement	Multi-Family Residence	FD
Entitlement	Site Plan Review – Water and Access	FD

MISCELLANEOUS BUILDING PLAN REVIEW

Entitlement	Additional Plan Review – Resubmittal	FD
Entitlement	Alternative Materials and Methods Review	FD
Entitlement	Expedited Review (each 2-hours + initial fee)	FD
Entitlement	Plan Review Time (per hour) for Modifications Re-stamp	FD
Entitlement	Pre-submittal meeting (initial 2-hours)	FD

FIRE SPRINKLER UNIT

Entitlement	Fire Flow Test Witness / Perform	FD
Entitlement	Fire Pump Installation	FD
Entitlement	New NFPA 13 Fire Sprinkler System: <100 heads per system	FD
Entitlement	New NFPA 13 Fire Sprinkler System: >100 heads per system	FD
Entitlement	New NFPA 13D Fire Sprinkler System: One or Two Family Dwellings	FD
Entitlement	New NFPA 13R Fire Sprinkler System: Multi-Family Dwellings	FD
Entitlement	NFPA #22 Fire Water Storage Tank	FD
Entitlement	Special Hazard Fire Extinguishing Foam Water Spray nozzle	FD
Entitlement	Standpipe System (Class I, II, III)	FD
Entitlement	TI to NFPA 13 Fire Sprinkler System: <25 heads without calculations	FD
Entitlement	TI to NFPA 13 Fire Sprinkler System: >25 heads and <100	FD
Entitlement	TI to NFPA 13 Fire Sprinkler System: >100 heads with/without	FD
Entitlement	Underground Fire Protection System: 5 or more Additional connections for hydrants or risers	FD
Entitlement	Underground Fire Protection System: Single Hydrant or single riser connection	FD

FIRE ALARM UNIT

Entitlement	Emergency Responder Radio Coverage	FD
Entitlement	Fire Alarm System: >131 Devices	FD
Entitlement	Fire Alarm System: 11-50 Devices	FD
Entitlement	Fire Alarm System: 51-90 Devices	FD
Entitlement	Fire Alarm System: 91-130 Devices	FD
Entitlement	Fire Sprinkler Monitoring System & Fire Alarm System with less than 10 devices	FD
Entitlement	Special Extinguishing Systems: CO2, FM200, Foam Liquid Systems, Inert Gas	FD

Interfaces

County requires the following interfaces to be developed and implemented for Users, all as within the scope of Amendment No. 4.

1) Interface between the Application Software and FIS (County's contract online payment company). (As of the Amendment No. 2 Effective Date, DRP has submitted a change order to Contractor for this interface, which will be made available to DPW under Amendment No. 2, DPR under Amendment No. 3, and Fire under Amendment No. 4)

- Pass bill information to FIS
- Receive bill payment information from FIS

Attachment A-3.1

Project Plan - FIRE

For EnerGov Implementation

Prepared for:

Los Angeles County Fire Department

1320 N. Eastern Avenue, Los Angeles, CA 90063

Prepared by:

Chuck Newberry

2160 Satellite Boulevard, Duluth, GA 30097

Tyler Technologies, Inc.

www.tylertech.com

Project Scope

The total professional services hours set forth in the Investment Summary have been allocated to the project as follows:

Billable Hours and Expenses in Scope

- Project Management Services = 720 resource hours
- System Configuration Services = 2,000 resource hours
- System Administration / Fundamentals Training = 80 resource hours
- End User Training & Production Support = 80 resource hours
- Report Development Services = 3 custom report; 5 letters and forms; 10 dynamic reports
- Data Conversion Services = 300 resource hours
- Travel Expense Estimate based on 25 on-site trips (where a "trip" is defined as onsite travel of up to five business days)
    - The project plan, addressed below, will give detail on when Tyler expects to be traveling onsite over the course of the project.
    - NOTE: A typical "onsite week" is onsite at the customer site Monday – Thursday at an expected duration of 8 hours per day. Exceptions may apply to best serve the needs of the project.

Business Scope (Transactions and Automation)

- Unique Business Transactions in Scope = up to 20 Transactions
- BMP Template Transactions in Scope = up to 5 Transactions
- Geo-Rules within Scope = up to 5 Geo-Rules
- Intelligent Objects and IAA's within Scope = up to 10 IO/IAA
- Custom Reports/Output documents within scope = up to 10 reports
- Integrations within scope = ***No integrations within Scope***
- Data Conversion Sources within scope = 1 (per data source)

"Business transaction" is defined by:

- Unique workflow or business process steps & actions (including output actions)
- Unique Automation logic (IO logic etc)
- Unique Fee assessment / configuration definition
- Unique Custom fields/forms definition

Uniqueness of any of these mentioned parameters regulates the need for a unique business case transaction design document and configuration event

"Template" transaction is defined by:

- A pre-defined and pre-configured EnerGov best management business process.

“Geo-Rule” is defined by:

- An automation event that is triggered by a condition configured around the source Esri geodatabase. Current geo-rule events are:

• Alert	• Displays a pop-up with a custom message to the user, notifying them of certain spatial data (i.e. noise abatement zones; flood zones; etc.).
• Block	• Places a block on the case and prevents any progress or updates from occurring on the record (i.e. no status changes can be completed, no fees can be paid, the workflow cannot be managed, etc.)
• Block with Override	• Places a block on the case and prevents any progress or updates from occurring on the record (i.e. no status changes can be completed, no fees can be paid, the workflow cannot be managed, etc.) However, the block can be overridden by end-users who have been given the proper securities.
• Fee Date	• Populates the CPI vesting date on the record if vesting maps are used by the jurisdiction.
• Filed Mapping	• A custom field or any field inherent in the EnerGov application can automatically populate with information based on spatial data.
• Required Action	• A workflow action can automatically populate in the workflow details for the particular record (i.e. plan, permit, code case, etc.) that requires the action based on certain spatial data related to the case.
• Required Step	• A workflow step can automatically populate in the workflow details for the particular record (i.e. plan, permit, code case, etc.) that requires the step based on certain spatial data related to the case.
• Zone Mapping	• The zone(s) automatically populate on the “Zones” tab of the record (i.e. plan, permit, code case, etc.).

“Intelligent Object (IO)” is defined by:

- Key components for automatically and reactively triggering geo-rules, computing fees, and generating emails, alerts and other notifications.

“Intelligent Automation Agent (IAA)” is defined by:

- A tool designed to automate task in a proactive manner by setting values and generating emails and other tasks. On a nightly basis, a Windows service sweeps the EnerGov system looking for IAA conditions that have been met, and the associated actions are then performed. The IAA does not generate alerts or errors.

"EnerGov SDK API (Toolkits)" are defined by:

- API's developed by Tyler Technologies for the purpose of extending the EnerGov Framework and functionality to external agencies and systems. Full documentation is available for each toolkit upon request.
  Note: The EnerGov toolkits and related documentation are simply tools that allow clients to create applications and integrations. The purchase of a toolkit does not imply any development related services from Tyler Technologies. The client is responsible for working with their IT staff and VAR's to develop any necessary applications and integrations except as otherwise noted in the Investment Summary for any "in-scope" integrations.

Estimated Timeline

An estimated timeline for the EnerGov implementation has been provided as an Appendix to this Statement of Work. Project timelines are living, fluid documents subject to change. The estimates provided in the Appendix are for the Customer's initial planning and resource allocation purposes. Timelines will be updated during the project planning process and adjusted, as necessary, over the course of the project. The estimated timeline is currently projected at **approximately 12 months from the project "kick-off" event through to the start of the production stage for a single project phase.** This timeline is estimated only based on scope of services included in the Investment Summary and is subject to change based on project factors uncovered during project planning activities and mutually available resource levels from both the customer and Tyler Technologies at the time of project initiation.

Tasks

The following tasks have been arranged for this project, with responsibility definitions for both Tyler and Customer as follows:

- **Own** – Ownership of the task throughout
- **Participate** – Active, ongoing participation in the task throughout
- **Advise** – Advisory role as needed by the other party
- **None** – No planned/required involvement by the designated party

Upon completion of a task, the customer will have an opportunity to review the deliverable, if any, associated with the task. The customer will have a five-day business window within which to identify to Tyler a deviation from the warranties provided in the parties' agreement. In the event a deviation is identified and confirmed, Tyler will address the deviation according the services warranty provision set forth in the Agreement, as applicable. When a corrected deliverable has been resubmitted for review,

that process shall repeat. Upon Stage completion, Tyler will provide the customer with a Work Acceptance Form to document that all tasks within the Stage have been successfully delivered. The customer must return the completed Work Acceptance form within five business days of receipt, or the Stage will be deemed "accepted."

Each stage is dependent on the results of the previous stage and therefore, each stage of the methodology cannot begin until the previous stage is completed and approved.

Stage 0 - Software Delivery

Objectives:

- Tyler software is made available the customer

Tasks:

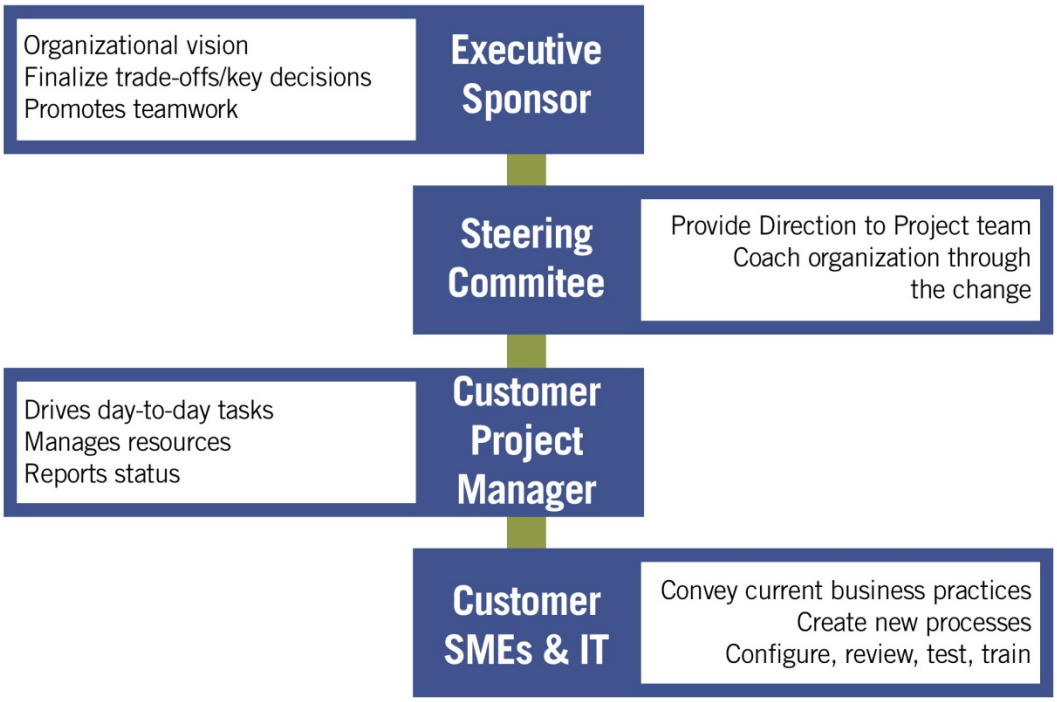
Software Delivery		
Tasks	Tyler	Customer
Perpetual License: Tyler makes the licensed software available on the project SharePoint site for downloading.	Own	None

Stage 1 - Initiation & Planning

Objectives:

- Introduction to project and detailed review of Stages, Tasks and Milestones/Deliverables
- Distribution of forms and gathering of high-level organizational and process information
- Establishment of Customer Governance Structure as outlined below - Please see Exhibit B for further details on the responsibilities of the various resources involved in the customer's project team
- Establishment of communication channels (Project Manager, SMEs, Permitting Systems Coordinator, etc.)
- Assessment of IT infrastructure and needs
- Planning for staff mobilization & allocation
- Create project plan, including baseline project schedule

Required Customer Governance Structure



Tasks:

Initiation & Planning		
Tasks	Tyler	Customer
Conduct Planning/Initiation Introductory Phone Call	Own	Participate
Assign Project Team Members and Establish Governance Structure	Advise	Own
Provide/Assign facilities for Tyler on-site activities	Advise	Own
Identify non-working days (i.e. vacations, holidays, etc.)	Own	Participate
Define procurement and configuration plan for necessary hardware, non-EnerGov systems software and networking infrastructure by the customer as specified by this documents Exhibit A	Advise	Own
Provide Tyler remote access (when needed) to required server for Tyler software installation and system configuration	Advise	Own

Deliver and review Process and Configuration Collection Templates	Own	Participate
Create SharePoint site to manage project deliverables, documents, and UAT	Own	None
Deliver and review Project Status Report Template	Own	Participate
Deliver and review Sample Signoff Form	Own	Participate
Deliver and review GIS requirements and best practices documentation	Own	Participate
Deliver and Discuss EnerGov API Documentation and Ownership of Programming Against the API	Own	Participate
Deliver and review Data Conversion Template Database (DCT-DB), ERDs and usage documentation	Own	Participate
Prepare programs/databases for integration	Advise	Own
Identify and document project risks and resolutions	Own	Participate
Amend project scope/SOW as needed	Own	Participate
Deliver and review Project Plan (including project schedule)	Own	Participate
Other tasks as identified	Own for respective team	Own for respective team
Deliver Project Planning & Initiation Stage Sign Off to Customer	Own	None
Return Project Planning & Initiation Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of Initiation and Planning Stage

Stage 2 - Assess & Define

Objectives:

- Team Training –System Admin /EnerGov Fundamentals
- Tyler to gain an understanding about how customer conducts business

- Translate business understanding into the “to-be” documented EnerGov configuration definition documentation
- Define custom report requirements and prioritize custom report requirements to prepare or refine customer report hours estimate or to determine whether additional hours are needed via a change order
- Define and map data conversion requirements (see section titled Data Conversion)
- Define integration specifications, as applicable
- Define and map, based on provided API’s, interface requirements, as applicable

Data Conversion within scope		
System Name	Details	Comments
See investment summary		

System Integrations within scope	
System Name	Comments
N/A	

Tasks:

Assess & Define		
Tasks	Tyler	Customer
Team Training	Own	Participate
Identify Business Transactions / Case Types (i.e. Permit Types, Plan Types, Inspection Types, etc.)	Advise	Own
Scope and document EnerGov configuration design document per business transaction / process	Own	Participate
Deliver ArcGIS base map service(s) to Tyler	Advise	Own
Develop Project Definition Documents to include comprehensive collection of business processes, configuration and other details identified during this Stage	Own	Participate
Deliver and review Project Definition Documents	Own	Participate
Determine which EnerGov API’s will be utilized (if applicable)	Advise	Own

Confirm whether EnerGov API's will be developed against by client or via 3rd party vendor (if applicable)	None	Own
Deliver and review list of out-of-the-box standard reports, documents, dashboards and search consoles in order to identify any gaps in report coverage that may require custom report development	Own	Participate
Develop Report Specifications	None	Own
Deliver Custom Report Development estimate (hours and cost) and accompanying Change Order (if necessary)	Own	Participate
Develop integration specifications (if applicable)	TBD	TBD
Deliver and review integration specifications to Customer (if applicable)	TBD	TBD
Other tasks as identified	Own for respective team	Own for respective team
Deliver Assess & Define Stage Sign Off to Customer	Own	None
Return Assess & Define Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of Assess & Define Stage

Stage 3a –System Configuration

Objectives:

- Configure the core EnerGov software in accordance with configuration definitions from Assess & Define stage

Tasks:

System Configuration		
Tasks	**Tyler**	**Customer**
Deploy Pre-production environment to house the configuration system as defined by Tyler's Hardware / Infrastructure requirements documentation	Advise	Own

Configure the software based upon the EnerGov configuration definitions established in the previous Assess & Define stage	Own	Participate
Perform ongoing reviews with customer as configuration progresses	Own	Participate
Deliver populated Data Conversion Template Database (DCT-DB)	None	Own
Complete Basic Configuration Reviews	Own	Participate
Deliver System Configuration Stage Sign Off to Customer	Own	None
Return System Configuration Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of System Configuration Stage

Stage 3b – Configuration - Internal Test

Objectives:

- Conduct initial operational test to ensure that Tyler has the information and configurations necessary to complete report development and data conversions
- Confirm basic system configuration to ensure proper operation

Tasks:

Internal Test		
Tasks	**Tyler**	**Customer**
Provide users logins for key Customer staff	Own	None
Conduct basic system configuration testing/retesting walkthrough	Own	Participate
Record testing results in SharePoint	None	Own
Resolve any system issues identified	Own	None
Other tasks as identified	Own for respective team	Own for respective team

Deliver Internal Testing Stage Sign Off to Customer	Own	None
Return Internal Testing Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of Internal Test Stage

Stage 4 - Build

Objectives:

- Develop Custom Reports per defined requirements, if any
- Import data from Data Conversion Template Database (DCT-DB) into master EnerGov database
- Development of scoped and defined integrations, as applicable
- Development against EnerGov API's through in-house or 3rd party developer (if applicable)

Tasks:

Build		
Tasks	**Tyler**	**Customer**
Review populated Data Conversion Template Database (DCT-DB) with EnerGov Data Services team member(s)	Advise	Own
Import data into EnerGov master database from populated Data Conversion Template Database (DCT-DB)	Own	None
Produce, deliver and review internally tested import of legacy data into EnerGov master database	Own	Participate
Produce, deliver and review internally tested custom reports per defined requirements (if applicable)	Own	Participate
Produce, deliver and review internally tested integrations per defined requirements (if applicable)	TBD	TBD
Provide and review the documented cut over strategy	Own	Participate
Develop against EnerGov API	Advise	Own
Other tasks as identified	Own for respective team	Own for respective team

Deliver Build Stage Sign Off to Customer	Own	None
Return Build Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of Build Stage

Stage 5a - System Acceptance Planning

Objectives:

- Create test scripts based on pre-determined functionality requirements criteria
- Provide system overview and administrator training for power users (i.e. customer testers, administrators and IT) (if applicable)
- Conduct testing and system validation for promotion to end user training

Tasks:

System Acceptance Planning		
Tasks	**Tyler**	**Customer**
Develop and review acceptance schedule and criteria	Own	Participate
Coordinate training logistics and schedule	Own	Participate
Provide facilities suitable to training and testing needs	Advise	Own
Provide, if requested by Customer, Tyler's training lab	Own	Advise
Recommend test strategies, scenarios and best acceptance practices	Own	Participate
Provide sample test scripts, as requested	Own	Advise
Develop test scripts and testing criteria (based on documented business processes, interfaces, imports, reporting, etc.)	Advise	Own
Provide standard training documentation, as available	Own	None
Create customer-specific training or business process documentation	None	Own
Provide System Overview and Administrator training for Power Users (if applicable)	Own	Participate

Deliver fully configured database for pre-System Acceptance Testing data import to EnerGov	None	Own
Populate Data Conversion Template Database (DCT-DB) with latest iteration for System Acceptance Testing	None	Own
Conduct pre-System Acceptance Testing import of data from Data Conversion Template Database (DCT-DB) in master EnerGov database and deliver to Customer	Own	None
Deploy fully configured and imported master EnerGov database into the Production testing environment	None	Own
Other tasks as identified	Own for respective team	Own for respective team
Deliver System Acceptance Planning Stage Sign Off to Customer	Own	None
Return System Acceptance Planning Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of System Acceptance Planning Stage

Stage 5B – Verification and System Acceptance

Objectives:

- Test and signoff on each delivered business process, suite or component based on criteria and scope
- System ready for production and promoted to a production and/or training environment
- "Ready for production" means that items that are not features enhancement or bugs that will allow the customer to move forward to User Training (Stage 6) and then go-live are addressed

Tasks:

Verification and System Acceptance		
Tasks	Tyler	Customer
Conduct testing of custom (if necessary) and standard reports	Advise	Own

Conduct testing of main EnerGov forms and end-to-end system functionality	Advise	Own
Conduct testing of produced integrations, if applicable	Advise	Own
Conduct testing of imported data	Advise	Own
Record testing results in SharePoint	None	Own
Resolve material System Acceptance Testing issues	Own	Participate
Retest until acceptance criteria developed in Stage 5A are met such that go-live can occur	Participate	Own
Identify out-of-scope configuration changes that do not impact System Acceptance based on predefined scope for post go-live change order	Own	Participate
Other tasks as identified	Own for respective team	Own for respective team
Deliver Verification and System Acceptance Stage Sign Off to Customer	Own	None
Return Verification and System Acceptance Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of Verification and System Acceptance Stage

Stage 6 - User Training

Objectives:

- Provide requisite hours of classroom and one-on-one training and knowledge transfer

Tasks:

User Training		
Tasks	**Tyler**	**Customer**
Coordinate training logistics and schedule	Own	Participate

Provide facilities suitable to training needs	Advise	Own
Provide, if requested by Customer, Tyler's training lab	Own	Advise
Deliver fully configured database for pre-User Training data import to EnerGov	None	Own
Populate Data Conversion Template Database (DCT-DB) with latest iteration for User Training	None	Own
Conduct pre-User Training import of data from Data Conversion Template Database (DCT-DB) in master EnerGov database and deliver to Customer	Own	None
Deploy fully configured and imported master EnerGov database into the Production testing environment	None	Own
Provide standard training documentation, as available	Own	None
Conduct customer training	Own	Participate
Provide business process training to ensure end users understand impact of process/practice changes decided upon during course of implementation	None	Own
If "train the trainer" approach, conduct end-user training	None	Own
Other tasks as identified	Own for respective team	Own for respective team
Deliver User Training Stage Sign Off to Customer	Own	None
Return User Training Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of User Training Stage

Stage 7 – Production & Production Support

Objectives:

- Conduct final data import cutover
- Conduct final integration deployment

- Tyler to provide on-site production support prior to cutover to Help Desk (Maintenance and Support)

Tasks:

Production & Production Support		
Tasks	Tyler	Customer
Deliver fully configured database for Production data import to EnerGov	None	Own
Populate Data Conversion Template Database (DCT-DB) with latest iteration for Production	None	Own
Conduct Production import of data from Data Conversion Template Database (DCT-DB) in master EnerGov database and deliver to Customer	Own	None
Deploy fully configured and imported master EnerGov database into the Production environment	None	Own
Provide onsite pre and post production support	Participate	Own
Define support logistics and schedule	Own	Advise
Assist customer as production issues arise	Own	Participate
Provide technical and functional user support	Participate	Own
Develop and maintain post-production issues list in SharePoint	Participate	Own
Ensure key/critical personnel are present and available to participate	Advise	Own
Other tasks as identified	Own for respective team	Own for respective team
Deliver Production & Production Support Stage Sign Off to Customer	Own	None
Return Production & Production Support Stage Sign Off to Tyler	None	Own

Milestone/Deliverable: Signoff of Production & Production Support Stage

Data Conversion

(See tasks associated with data transfer, above)

The following criteria are applied to Data Conversion

Data Format

The customer must provide data to Tyler in the Data Conversion Template Database (DCT-DB) structure, as set forth in the SOW Exhibits. Providing data in this format will ensure that data is properly imported into the system. Data not provided in this structure will not be considered for import.

Data scrubbing/cleansing

Any data scrubbing should be done by the customer prior to populating the DCT-DB. Data scrubbing and cleansing is not included in the EnerGov proposal.

Required Fields

There are certain fields in the EnerGov software which are required fields, and we cannot write records to the EnerGov master DB without populating these columns. Sometimes, these required fields will not be available in the legacy source data, so a simple default value can be written to the DCT-DB to fulfill the NOT NULL constraint. Tyler would write the default value as part of the conversion process.

Custom Fields

Most legacy systems will have some attribute fields that are not specified in the corresponding master table within DCT-DB. In the EnerGov software, we will refer to these as custom fields. Within each module, there will be a child table for such custom fields. Since these are specific to the legacy system(s), the customer may add columns to these tables in DCT-DB to accommodate any needed custom fields in the migration.

Parsing data

The data format is defined based on the fields that exist in the EnerGov module (street number and street name, for example). If the customer would like that data to be converted, the customer will have to break out its legacy data so that it matches the EnerGov data fields.

Address Data: Tyler does not parse out address information for optimization purposes. Rather the customer is responsible to deliver the address information in the requested (preferred format). Tyler will import the address data delivered (format) and map the fields to the best possible location in the EnerGov system. Tyler is not responsible for cleanup of inconsistent addressing.

Phone Numbers: Phone numbers are imported in the format in which the data is delivered to Tyler. Tyler is not responsible for cleanup of inconsistent numbering or sequencing.

Individuals / Names: Individual names are imported in the format in which the data is delivered to Tyler. Tyler is not responsible for parsing out single name fields into First, Last, Middle, Company, etc.

Contacts Data: If contact data is not keyed in such a way that each instance of a person has one, and only one, contact record (the record with all of their attributes such as name, address, company, phone, etc.) in the data source, then the contacts associated with a record will typically be imported into a general information tab rather than into the EnerGov Enterprise Contacts Manager.

Business-Specific Rules

Business specific rules are handled in the software configuration process and cannot typically be mapped within the data conversion process. This includes but is not limited to EnerGov Intelligent Objects and EnerGov Case Workflows.

Calendars & Scheduling

EnerGov software can import scheduled hearings and meeting details; however any data residing on an actual calendar control is excluded from the scope of the data conversion.

Key Project Assumptions

Tyler shall initially implement the most current version of the Tyler software at the time of the contract signing. During the implementation Tyler will provide newer releases of the software that meet or exceed the version available at contract signing. After Go-Live, the customer is responsible for installing newer releases. Release notes are provided for all new versions.

- Customer will maintain primary responsibility for the scheduling of customer employees and facilities in support of project activities.
- Customer will provide/purchase/acquire the appropriate hardware, software and infrastructure assets to support all purchased Tyler software products in both support/testing and production environments.
- Customer is responsible for proper site preparation, hardware, software and network configuration in accordance with Tyler specifications.
- Customer has, or will provide, access licenses and documentation of existing system to which Tyler will read, write or exchange data.

- Customer has, or will provide, a development/testing environment for import and interface testing as they are developed by Tyler.
- Tyler will provide Customer with a weekly status reports that outline the tasks completed. Tyler will also provide details regarding the upcoming tasks that need to be completed during the coming weeks, the resources needed (from customer) to complete the tasks, a current or updated version of the project plan, and a listing of any issues that may be placing the project at risk (e.g., issues that may delay the project or jeopardize one or more of the production dates) as needed.
- Tyler personnel shall attend executive project review committee meetings (internal) as needed.
- Out of scope deliverables will only be provided via a change order that is mutually agreed to.

Risk / Mitigation Strategy

The following are samples of common risks experienced during implementations of EnerGov and are provided herein to both educate the customer and set expectations around typical approaches Tyler will take to risk mitigation. Actual management of a risks/issue log will be handled through our project management plans developed by the Tyler Project Manager.

Project Schedule

Risk: Impact of various factors on baseline project schedule.

Mitigation: Given the fact that project schedules are working documents that change over the course of the project, Tyler will work closely with the customer to update, monitor, agree, and communicate any required changes to the project schedule.

Activity Focus

Risk: Minor activities consume time that should be dedicated to major activities of the project with the end result that time and/or costs overruns budget. Examples include meetings of little substance, or time spent investigating undocumented functionality or other activities not in scope.

Mitigation: Project Managers for both parties must focus squarely on meeting deadlines, services, and configuration requirements of the implementation as planned and documented in the planning, assessment and definition stages.

Incomplete Legacy Interface Documentation

Risk: During the project, certain third party documentation will be required for such tasks as interface development and import of legacy data and others.

Mitigation: Customer should insure that APIs for interfacing to other systems, and/or a customer expert that understands the legacy database, are available to Tyler. If no such documentation or customer

expertise exists, the customer will be responsible for coordinating with the third-party vendor to advise Tyler, at a potential additional expense to the customer (although not necessarily from Tyler).

Technology Age

Risk: This risk is highly dependent on the choice of Tyler products and whether the customer is hosting any of those products. If the customer will be hosting the Tyler software, then the technology hosting that software should be robust and durable. Technology that barely meets minimum requirements today will be insufficient as the needs of the system grow.

Mitigation: Tyler will assist the customer in determining optimal technology and plans to guard against pre-mature obsolescence. The customer will also complete a hardware survey, initiated by our deployment team, to confirm that the customer's hardware is sufficient for the upcoming implementation.

Critical Success Factors

In order to successfully execute the services described herein, there are several critical success factors for the project that must be closely monitored.

- **Knowledge Transfer** - While Tyler cannot guarantee specific expertise for customer staff as a result of participating in the project, Tyler shall make reasonable efforts to transfer knowledge to the customer. Customer personnel must participate in the analysis, configuration and deployment of the Tyler software in order to ensure success and to transfer knowledge across the organization. After completion of the production phase (Stage 7), the customer will be responsible for administering the configuration and introduction of new processes in the Tyler system.
- **Dedicated Customer Participation** – Tyler understands that customer staff members have daily responsibilities that compete with the amount of time that can be dedicated to the Tyler implementation project. However, it is critical that the customer acknowledges that its staff must be actively involved throughout the entire duration of the project as defined in the Project Plan. Tyler will communicate insufficient participation in Project Status Reports.
- **Managing Project Scope** - To implement the project on time and within budget, both the customer must acknowledge the scope of the project set forth in the parties' agreement, and, for services, refined over the course of the early project Stages described in this Statement of Work. Change Orders for additional items outside the scope must be submitted in advanced and signed by project stakeholders before work can begin on those items. Likewise, reductions of the defined scope will also require a Change Order.

Project Management

Tyler performs ongoing project management services throughout the implementation in order to plan and monitor execution of the project. Project Management includes the following tasks:

- Risk management
- Monitoring project budget
- Project Plan management using our expense and time-tracking tool/Excel
- Project document management using SharePoint
- Issue log management and escalation
- Status reporting
- Change order management
- Project workspace management
- Resource management
- Executive project oversight via Executive Director and Customer Governance Structure

By mutual agreement, some project management tasks are shared between the Tyler project team and the customer Project Manager/stakeholders.

Development Tools

Configuration tools (the same ones Tyler will use to implement the system) are built-into the software. The customer has full access to them, and its administrators will be trained on them. EnerGov reports are developed in Crystal Reports, so any changes to customer reports does require a licensed copy of Crystal Reports. The EnerGov system does include a Crystal Report reader, so view-only users do not require a Crystal Reports license. In addition, if applicable, the customer and/or their 3rd party vendor will need to utilize industry-standard programming tools for any development against the EnerGov API toolkits.

Documentation

Tyler-provided documentation

Over the course of the staged implementation lifecycle, the Tyler project team will provide stage-specific documentation in a range of formats (both editable and non-editable). Examples include:

- Data Collection docs (MS Excel) for configuration
- Data Mapping docs (MS Excel) for data conversion
- ERDs & Data Dictionaries for IT (PDF and CHM)
- API Documentation (PDF)
- Training Documentation Templates (MS Word and MS PowerPoint)
- Release Notes for Service Packs (PDF)
- Other documentation as required for the specifics of the project.

Customer-Provided Documentation

A definitive list of Customer-provide documentation is not possible until all aspects of the implementation are determined, usually in the beginning stages of the project. Tyler does not expect the customer to general documents that do not exist in the regular course of customer's business. Customer's assistance

in completing the Tyler-provided forms and requests for configuration information is essential to a successful project.

Documentation originated by the Customer may include:

- API's for any third-party software system to which the Tyler software will interface and exchange data
- Import data documentation and in a format suitable for import into the Tyler software (please see section titled Data Conversion)
- Workflow documentation on the customer's current business processes
- Copies of pertinent ordinances or other controlling authorities
- Fee schedules
- Copies of existing permits, licenses, other documents presented to the public and expected to be derived from the Tyler software

**See project resource allocation chart on the next page

Project Resources - only used to build required resource hours

EnerGov Professional Services (Permitting & Land Mgmt)

All professional services billed bi-monthly as consumed.

Exhibit A:Project Resources - 7 month Project Workplan for LA County DPW

	Implementation Stream	Deliverables Description		Estimated Travel / Trips (50% for dedicated resources)	Implem. Director/ Sponsor	Project Manager (50%)	Implementation Consultant	Technical Engineer	Dev / Data Conversion Specialist	GIS Analyst	Report Developer	Onsite Software Trainer	Total Resource Days (Exc. Travel)	Total Resource Costs (Exc. Travel)	Estimate Stage Duration (MONTHS)	Milestones	Total Time Per Stage (months)
					Resources Man Days / Costs												
			Daily Rate (8 hrs)->	$2,000	$1,360	$1,360	$1,360	$1,360	$1,800	$1,360	$1,360	$1,360					
	Stage 0 - Software Delivery & Certifications																
0-1	Software Delivered			Software Licenses Issued & Made Available													
	Stage 1 - Planning												24	$32,640	-- Stage Summary		
1-1	Project Initiation & Planning	Project Kickoff, project plan, initial scoping, fundamentals training (up to 10 users		3	0	7	5	0	0	2	0	10	24		.5 Months		1/2
				$6,000	$0	$9,520	$6,800	$0		$2,720	$0	$13,600		$32,640		Milestone	
	Stage 2 - Assess & Define												67	$91,760	-- Stage Summary		
2-1	Assess & Define Business Processes	Joint Assess & Define		3	2	10	37	10	3	5	0	0	67		1 months		1
				$6,000	$2,720	$13,600	$49,640	$13,600	$5,400	$6,800	$0	$0		$91,760		Milestone	
			Stage hrs Tot	3	2	10	37	10	3	5	0	0					
			Totals $ Tot	$6,000	$2,720	$13,600	$49,640	$13,600	$5,400	$6,800	$0	$0					
	Stage 3a - System Configuration												153	$153,680	-- Stage Summary		
3a-1	EnerGov Configuration	Joint System Cofiguration		6	2	20	60	26	0	5	0	0	113		2.5 months		2.5
				$12,000	$2,720	$27,200	$81,600	$35,360	$0	$6,800	$0	$0		$153,680		Milestone	
			Stage hrs Tot	6	2	20	100	26	0	5	0	0					
			Totals $ Tot	$12,000	$2,720	$27,200	$81,600	$35,360	$0	$6,800	$0	$0					
	Stage 3b - Internal Test												27	$36,720	-- Stage Summary		
3b-1	EnerGov Configuration	EnerGov configuration testing		2	2	5	10	5	0	5	0	0	27		.5 month		1/2
				$4,000	$2,720	$6,800	$13,600	$6,800	$0	$6,800	$0	$0		$36,720		Milestone	
			Stage hrs Tot	2	2	5	10	5	0	5	0	0					
			Totals $ Tot	$4,000	$2,720	$6,800	$13,600	$6,800	$0	$6,800	$0	$0					
	Stage 3c - Build Specifications												44	64,660	-- Stage Summary		
3c-1	EnerGov Configuration	Joint System Cofiguration		2	1	8	15	0	0	0	0	0	24				
				$4,000	$1,360	$10,880	$20,400	$0	$0	$0	$0	$0		$32,640		Milestone	
3c-2	Custom Reports Specifications	Developed specifications (3 custom;3 modifications;3 letters)		1	0	1	1	0	0	0	4	0	6				
				$2,000	$0	$1,360	$1,360	$0	$0	$0	$5,440	$0		$8,160		Milestone	
3c-4a 3c-3a tl	Data Mapping & Specifications	Current System; one consolidated source	Days	0	0	1	0	0	13	0	0	0	14		1 month		1
			Costs	$0	$0	$1,360	$0	$0	$22,500	$0	$0	$0		$23,860		Milestone	
	Integration Definitions and Specifications		Days	0	0	0	0	0	0	0	0	0	0				
			Costs	$0	$0	$0	$0	$0	$0	$0	$0	$0		$0		Milestone	
			Stage hrs Tot	3	1	10	16	0	13	0	4	0					
			Totals $ Tot	6,000	1,360	13,600	21,760	0	22,500	0	5,440	0					
	Stage 3d - Build												60	90,930	-- Stage Summary		
3d-1	EnerGov Configuration	Joint System Cofiguration		2	1	9	15	0	0	0	0	0	25				
				$4,000	$1,360	$12,240	$20,400	$0	$0	$0	$0	$0		$34,000		Milestone	
3d-2	Report Development	Developed specifications (up to 10 reports)		0	0	0	1	0	0	0	11	0	11				
				$0	$0	$0	$680	$0	$0	$0	$14,810	$0		$15,490		Milestone	
3d-4a t 3d-3a t	Data Conversion Development	Current System; one consolidated source	Days	0	0.0	1	3	0	20	0	0	0	24				1
			Costs	$0	$0	$1,360	$4,080	$0	$36,000	$0	$0	$0		$41,440		Milestone	
	Intergration Development		Days	0	0	0	0	0	0	0	0	0	0				
			Costs	$0	$0	$0	$0	$0	$0	$0	$0	$0		$0		Milestone	
			Stage hrs Tot	2	1	10	19	0	20	0	11	0					
			Totals $ Tot	$4,000	$1,360	$13,600	$25,160	$0	$36,000	$0	$14,810	$0					
	Stage 4a - System Acceptance Planning												17	$23,120	-- Stage Summary		
4a-1	EnerGov Configuration	Joint System Cofiguration / UAT assistance		1	1	3	5	0	0	0	0	0	9		.5 month		1/2
				$2,000	$1,360	$4,080	$6,800	$0	$0	$0	$0	$0		$12,240		Milestone	
4a-2	System Acceptance Criteria & Training	Preparation for Acceptance / UAT Training / Test Script Development		1	0	0	0	0	0	0	0	8	8		.5 month		
				$2,000	$0	$0	$0	$0	$0	$0	$0	$10,880		$10,880		Milestone	
			Stage hrs Tot	2	1	3	5	0	0	0	0	8					
			Totals $ Tot	$4,000	$1,360	$4,080	$6,800	$0	$0	$0	$0	$10,880					
	Stage 4b - System Acceptance - Go Live Ready												21	$28,560	-- Stage Summary		
4b-1	System Acceptance	Support for LA County UAT team		3	1	5	15	0	0	0	0	0	21		1 months		1
				$6,000	$1,360	$6,800	$20,400	$0	$0	$0	$0	$0		$28,560		Milestone	
			Stage hrs Tot	3	1	5	15	0	0	0	0	0					
			Totals $ Tot	$6,000	$1,360	$6,800	$20,400	$0	$0	$0	$0	$0					
	Stage 5 - Training / Configuration												42	63,240	-- Stage Summary		
5-1	EnerGov Configuration	Joint System Cofiguration / Go-Live Ready Updates, etc.		0	1	6	5	0	0	0	0	0	12		.5 month		1/2
				$0	$1,360	$8,160	$6,800	$0	$0	$0	$0	$0		$16,320		Milestone	
5-2	Training	Train the Trainer for up to 25 users		0	0	0	0	0	0	0	0	30	30				
				$0	$0	$0	$6,800	$0	$0	$0	$0	$40,120		$46,920		Milestone	
			Stage hrs Tot	0	1	6	5	0	0	0	0	30					
			Totals $ Tot	$0	$1,360	$8,160	$13,600	$0	$0	$0	$0	$40,120					
	Stage 6 - Production Support												21	29,440	-- Stage Summary		
6a-1a tl	Final Data Import Cutover	Current System; one consolidated source	Days	0	0	0	1	0	2	0	0	0	3		1 week		1/4
			Costs	$0	$0	$0	$1,360	$0	$3,600	$0	$0	$0		$4,960		Milestone	
6b-1	OnSite Production Support	NOTE: Invoiced weekly until full requirements are met.		1	1	2	15	0	0	0	0	0	18		1 week		
				$2,000	$1,360	$2,720	$20,400	$0	$0	$0	$0	$0		$24,480		Milestone	
			Stage hrs Tot	1	1	2	16	0	2	0	0	0					
			Totals $ Tot	2,000	1,360	2,720	21,760	0	3,600	0	0	0					
			Estimated Resourced Days (8 hr days)	25	12	78	227	41	38	17	15	48	475				
			Estimated Resource COST	$50,000	$16,320	$106,080	$261,120	$55,760	$67,500	$23,120	$20,250	$64,600		$614,750			

Exhibit A

To Attachment A-3.1 of Project Plan - FIRE

System Requirements

Los Angeles County Fire Department

Hardware and Network Requirements

System Requirements

Tyler's software is designed to operate on networks and operating systems that meet certain requirements. Systems that do not meet the required specifications may not provide reliable or adequate performance, and Tyler cannot guarantee acceptable results.

Site Assessment

Site assessments are an automated process. Each site is required to complete the automated process and submit results to their assigned project manager before any work can be completed on the project. While the automated process may be run prior to contract signature, the results submitted to Tyler must be dated after the Effective Date of the contract.

To complete your site assessment log in to http://check.tylertech.com

Enter your email address and the password "Tyler".

Select the product purchased to begin your system assessment. You will also be able to download PDF copies of hardware requirements from within the process. We strongly recommend that you download and keep a copy of the full hardware requirements as this document also covers recommended data backup procedures.

The link above is a generic login and password. During implementation, your project manager will provide you with a unique site and password to test your site and log results.

Exhibit B

To Attachment A-3.1 of Project Plan - FIRE

Customer Roles & Skills Requirements

Los Angeles County Fire Department

Customer Roles/Skills Requirements

Project Collaboration

A successful Tyler enterprise implementation is a collaborative endeavor in which both Tyler Project Team members and agency personnel occupy specific roles (and the responsibilities associated therewith). While definitive client-side roles and skills may vary from project to project (depending on the agency's resource availability) the following designations represent the typical and recommended resource involvement for most agencies.

Executive Sponsor:

This role is typically an executive or managerial sponsor of either the IT group or a dominate business group that is ultimately responsible for the success of the project.

Typical positions: IT Director / Department or Division Director

Responsibilities include:

- Ultimate responsibility for the success of the project; serves as project champion.
- Creating a positive environment that promotes project buy-in.
- Driving the project through all levels of the agency.
- High-level oversight throughout the stages of the project; ROI initiatives oversight.

Project Steering Committee:

This committee is formed by executive or managerial staff of every affected business group to be implemented.

Typical individuals include a committee of the following: CIO / Community Development Director / Finance Director / CBO / Planning Director / Fire, etc…

Responsibilities include:

- Ensure proper change management and leadership to departmental staff.
- Determine beneficial process change through automation as it is presented cross-departmentally.
- Monitor project from high level.

Customer Project Manager:

This role is typically a non-business group member (IT or support staff) of the agency's project team.

Typical positions: IT or applications support project manager, Greg Wong, IMD

Responsibilities include:

- Serve as coordinator of the agency's Implementation team / subject matter experts.
- Assist in managing the project scope, deliverables and timeline with assistance from the Tyler Project Manager.
- Ensure that the project team stays focused, tasks are completed on schedule, and that the project stays on track.
- Develop and maintain the project resource plan in conjunction with the Tyler Project Manager.
- Schedule and coordinate project tasks with assistance from the Tyler Project Manager.
- Coordinate agency's Implementation team resources with all departments.
- Participate in daily project activities and track progress on project tasks.
- Hold meetings with project stakeholders to update on project status and to reach verdict on any escalated process decisions that need to be made.
- High-level oversight throughout the stages of the project; ROI initiatives oversight.

Desired Skills/Experience:

- Previous project management experience as project manager
- Strong IT technical background
- Bachelor's Degree in Computer Science or equivalent experience
- Experienced with an iterative-based development approach
- SharePoint & Microsoft Project experience a plus
- Excellent knowledge of Customer Business Practices and Processes

Departmental System Administrators:

A user representative for each affected department is typically appointed for the entire lifecycle of the implementation and to serve as ongoing configuration support or "Systems Administrator" post the production phase of the EnerGov system.

Typical positions: Departmental or division subject matter expert and typically a direct member of the business group or of the business applications support group.

Responsibilities include:

- Being trained on the EnerGov .NET system at a System Administration level.
- Being fully engaged in the business analysis system configuration, reviews and UAT activities.
- Assist internal efforts towards the creation of reports, interfaces & conversions.
- Actively participate in the full implementation of Tyler's EnerGov software solution.

- Serve as ongoing departmental or division system configuration support post the production phase of the project

Desired Skills/Experience:

- Proficient in Crystal Reports
- Analytical/Problem Solving Skills
- Experience with other “configurable” enterprise applications such as PeopleSoft, SAP, etc.

Departmental Business Leads:

A user representative for each affected department must be appointed for the entire lifecycle of the implementation. Assigning competent business leads to assist in the project is highly recommended and can often determine the success of the implementation for their respective areas. These Business Leads are typically transitioned into Tyler "Power Users".

Typical positions: Departmental or division "power user" and member of the business group.

Responsibilities include:

- Attending assessment workshop sessions.
- Willing and able to gather data and make decisions about business processes.
- Assist as a knowledge-base in the creation of specifications for reports, interfaces & conversions.
- Review and test the system configuration.

Technical Lead:

A technical individual from the Information technology group that is responsible for the technical infrastructure support of the implementation and to serve as ongoing technical infrastructure support post the production phase of the EnerGov software system.

Typical positions: Network / IT Administrator

Responsibilities include:

- Primary responsibility for the technical environment during the software implementation
- Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards
- Work with Tyler's technical personnel during implementation
- Maintain the testing and production databases
- Install software updates and releases
- Act as the primary technical resource for troubleshooting technical problems
- Establish and maintain backup, archival, and other maintenance activities

Exhibit C

To Attachment A-3.1 of Project Plan - FIRE

Custom Report and Forms Form

Los Angeles County Fire Department

EnerGov Custom Request Form

Fill out this form as completely and with as much detail as possible. Please attach any sample reports or other supporting documentation and be sure to save a copy for your records. The more detail provided, the better the report designer can develop the report without additional follow-up. Not all items will apply to each report; you need only complete those items that are relevant to the request. Exceptions to these requirements may be noted under Additional Details. To save time for a large number of similar report requests, save basic information as a template.

Client Name:	Report Requestor/Point of Contact:	Request Date:

EnerGov Module:			Requested Completion Date:
☐Application Management ☐Business License ☐Cashier ☐Code Management ☐Contact Management	☐Impact Management ☐Inspection Management ☐Object Management ☐Permit Management ☐Plan Management ☐Professional License	☐Project Management ☐Rental Prop Management ☐Request Management ☐Tax Remittance System ☐Other	Priority (1=High, 5=Low) ☐1 ☐2 ☐3 ☐4 ☐5

Report Name:	Report Type: ☐Report ☐Document
Report Description/Business Need:	Request Type: ☐New ☐Modification
Based on Similar or Existing Standard or Custom Report:	Report Target: ☐Client ☐Customer ☐EnerGov

Format Design:

Report Style: ☐Replicate Sample Exactly OR ☐Listing ☐Letter ☐Free Form ☐Certificate ☐Dashboard

Report Orientation:	Report Output:	Paper Type:
☐Portrait ☐Landscape	☐Print/PDF ☐ Excel/CSV	☐Letter ☐Legal ☐Ledger ☐Printed Form ☐Other

Include Print Date/Time:	Include Page Numbers:	Date/Time Formats:
☐Time ☐Header ☐Left	☐Page N ☐Header ☐Left	☐MM/DD/YYYY ☐HH:MM?M

☐Date ☐Footer ☐Center ☐Right	☐Page N of M ☐ Footer ☐ Center ☐Right	☐M/D/YY ☐HH:MM?m ☐MMM D, YYYY ☐H:MM?M ☐MMM, YYYY ☐H:MM?m ☐DD/MM/YY ☐HH:MM ☐MM/DD/YY ☐HHMM (24)
Default Font Information: (Times New Roman, 10 point, Black if not specified): Font Name: Font Size: Font Color: Black or		

Technical Design:	
Identify Attached Specifications/Sample Documents (XLS, DOC, PDF, etc.):	
Primary SQL Stored Procedure (for existing reports):	**EnerGov Parameter:** ☐Date Range ☐ Module ID ☐Other
Record Selection Inclusion/Exclusion Filter or Parameters (please put additional filters in the Notes for Developer): Filter #1 Filter#2 Filter#3 Parameter: ☐User ☐Static ☐Dynamic Parameter: ☐User ☐Static ☐Dynamic Parameter: ☐User ☐Static ☐ Dynamic	
How Report Data is to be Stored or Grouped (please put additional sort/groupings in the Notes for Developer): Primary Sort: Secondary Sort: Tertiary Sort: ☐Group ☐Group ☐Group	

Additional Details
Notes For Developer:
QA Instructions/Test Case Scenarios:
Client Services Notes:

Client Notes:	
Approvals	
Ready To Develop Checklist	
☐	All static and data elements have been identified in the report specification
☐	All formatting requirements have been identified in the report specification
☐	Indicate in the report specification whether to list one address type, all address types, or prioritization of address types
☐	Indicate in the report specification whether to list one contact type, all contact types or prioritization of contact types
☐	Indicate in the report specification whether to list one phone number, all phone numbers or prioritization of phone numbers
☐	All custom fields have been created in the client database
☐	All custom fields have been configured on appropriate Additional Info dialogs
☐	All record types, classes, statuses, etc. necessary to the report have been configured
☐	All fees and fee templates necessary to the report have been configured
☐	All address types necessary to the report have been configured
☐	All contact types necessary to the report have been configured
☐	All objects, impact conditions, certifications, and other elements necessary to the report have been configured
☐	All workflow steps and actions necessary to the report have been configured
☐	All support data (Bonds, Hearings, Parcels, Tasks, Users, Zones, etc.) necessary to the report have been configured
☐	Client has approved custom report request specification

Specification Report Developer	**Specification Date**	**Estimated Initial Dev/QA Hours**	**Estimated Initial Dev/QA Cost**
Client Services Representative		**Submitted Date**	**Billable Type:**

Client Approval

I agree that the above and associated documents accurately reflect the requirements for this Custom Report Request.

Understanding the EnerGov Custom Report Request Form

The following describes each item on the EnerGov Custom Report Form:

General Information

- **Client Name** – Name of the project client.

- **Report Requestor/Point of Contact** – Name of original customer or Tyler source of report requirements.
- **Request Date** – The date the request form is filled out.
- **EnerGov Module** – Check the box for the module for which the report is being developed.
- **Requested Completion Date** – The date the report has been promised to the customer.
- **Priority** – The importance of the report to the client (high priorities will be completed first).
- **Report Name** – The name the report is to be called (will be used for the RPT and SQL file names).
- **Report Type** – Whether the report is a batch-style report or single case document.
- **Report Description/Business Need** - Describe the purpose or use of the report.
- **Request Type** – Whether request is based on, or modification to, an existing report or a new report.
- **Based On Or Similar To Existing Standard or Custom Report** – Identify an existing report that should be used as a starting point for further development.
- **Report Target** – Indicate if this report is for EnerGov use, internal Client use, or will be delivered to end Customers.

Format Design

- **Report Style** – Whether the report style is a listing format (table), Letter (to be mailed), Form (completed or to be filled out), Certificate (such as license or permit), Dashboard (summary analysis of data) or Exact (identical to the sample report).
- **Report Orientation** – Whether the report page orientation is Portrait or Landscape.
- **Report Output** – Whether report is intended to be read (Print/PDF) or exported (Excel/CSV).
- **Paper Type** – Select the type of paper the report will be printed on (letter, legal, ledger, pre-printed form, or other paper size). If selecting other, please identify in Additional Notes.
- **Include Print Date/Time** – Select whether to include the print date and/or time in the report header/footer and to justify it center, left or right.
- **Include Page Numbers** – Select whether to include Page Number and or Page Total in the report header/footer and to justify it center, left or right.
- **Date/Time Formats** – Select the default style of date and time to be used in the report.
- **Default Font Information** – If the default font size, style and color not specified: Times New Roman, 10pt, Black.

Technical Design

- Identify Attached Specification/Sample Documents - List the file names of additional requirements specifications or sample documents.
- **Primary SQL Stored Procedure** – The name of any existing stored procedure to be used for the report.
- **EnerGov Parameter** – Indicate if the key report parameter is a date range, an EnerGov Module ID or other field.
- **Record Selection Inclusion/Exclusion Filter Or Parameters** – List any filters to include or exclude records, in addition to any EnerGov Parameter, that should be applied to the data record selection or SQL Stored Procedure. If the filter is to be a user-prompted parameter, indicate whether the user will enter a value, select from a list of static values, or select from a dynamic list of values. If more than three, please list in *Notes For Developer*.
- **How The Report Is To Be Sorted or Grouped –** List any primary, secondary or tertiary sorting. Note if the report should be grouped by the sort value. If any group summary totals and/or if more than three sort/group levels are required, please list in *Notes For Developer*.

Additional Details

- **Notes for Developer** – Any additional information that will aid in the design and development of the report.
- **QA Instructions/Test Case Scenarios** – Special testing information to facilitate report testing and validation.
- **Client Services Notes** – Any additional comments about the report for the Implementation Team.
- **Client Notes** – Any additional comments about the report for the client.

Approval

- **Ready To Develop Checklist –** List of items for Implementation to make sure are complete before submitting the Report Request.

    - All static and data elements have been identified in the report specification
    - All formatting requirements have been identified in the report specification
    - Indicate in the report specification whether to list one address type, all address types, or prioritization of address types
    - Indicate in the report specification whether to list one contact type, all contact types or prioritization of contact types
    - Indicate in the report specification whether to list one phone number, all phone numbers or prioritization of phone numbers
    - All custom fields have been created in the client database
    - All custom fields have been configured on appropriate Additional Info dialogs
    - All record types, classes, statuses, etc. necessary to the report have been configured
    - All fees and fee templates necessary to the report have been configured
    - All address types necessary to the report have been configured
    - All contact types necessary to the report have been configured
    - All objects, impact conditions, certifications, and other elements necessary to the report have been configured
    - All workflow steps and actions necessary to the report have been configured
    - All support data (Bonds, Hearings, Parcels, Tasks, Users, Zones, etc.) necessary to the report have been configured
    - Client has approved custom report request specification

- **Specification Report Developer –** The name of the Report Developer assisting in the requirements gathering and report specification.
- **Specification Date –** The date the specification was completed.
- **Estimated Initial Development/QA Hours –** The number of hours expected for initial report development and QA. Revisions and subsequent changes to the specification may require additional hours.
- **Estimated Initial Development/QA Cost –** The expected billable cost for initial report development and QA. Revisions and subsequent changes to the specification may lead to additional billable costs.
- **Client Services Representative –** The name of the Client Services Representative working with the client.
- **Submitted Date** – The date the approved Custom Report Request is submitted to the Report Development Team.

- **Billable Type** – Whether this report is part of a contracted set of development hours, or will be billed against a client purchase order.
- **Client Approval** – Authorization by the client verifying that the report requirements are correct.

Exhibit D

To Attachment A-3.1 of Project Plan - FIRE

DB Data Model and Guide

Los Angeles County Fire Department

Data Conversion for EnerGov Enterprise Server Template DB Data Model and Guide

The tables in the EG_Template db are grouped together and named such that they correspond closely with the structure of the EnerGov core product, which is broken out into different units/modules. Below, each module will contain a listing of the tables, a brief description, and an ERD diagram. All of these ERD diagrams are present within the EG_Template db (under the Database Diagrams folder in SQL Server).

Contact Repository:

contact

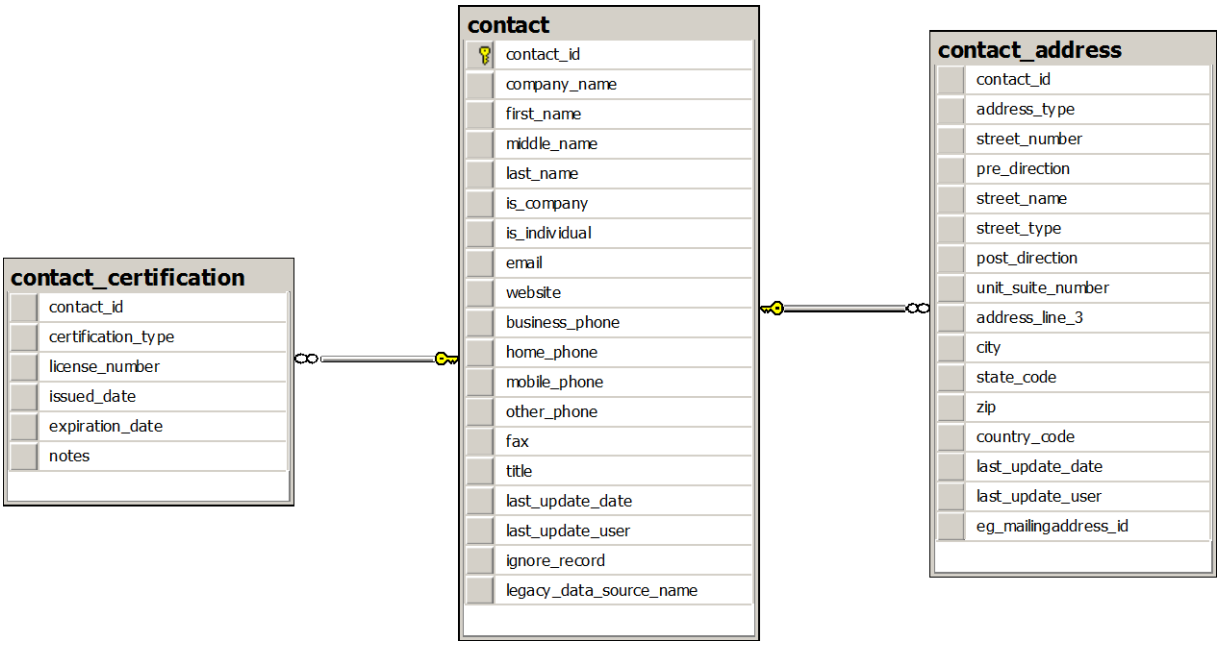
This contains the master list of contacts to convert. Duplicates should be kept to a minimum. The goal would be to have one contact record for each actual person or company. Every module within EnerGov will utilize this same contact master table for its case contacts.

contact_address

The various addresses associated to the contact. Address_type is available to distinguish different addresses (mailing, location, billing, etc.).

contact_certification

This is used to hold certifications or licenses that are desired for historical purposes, but are not being managed in EnerGov with Professional Licensing or Business Licensing.



Professional Licensing:

contact

See Contact Repository.

professional_license

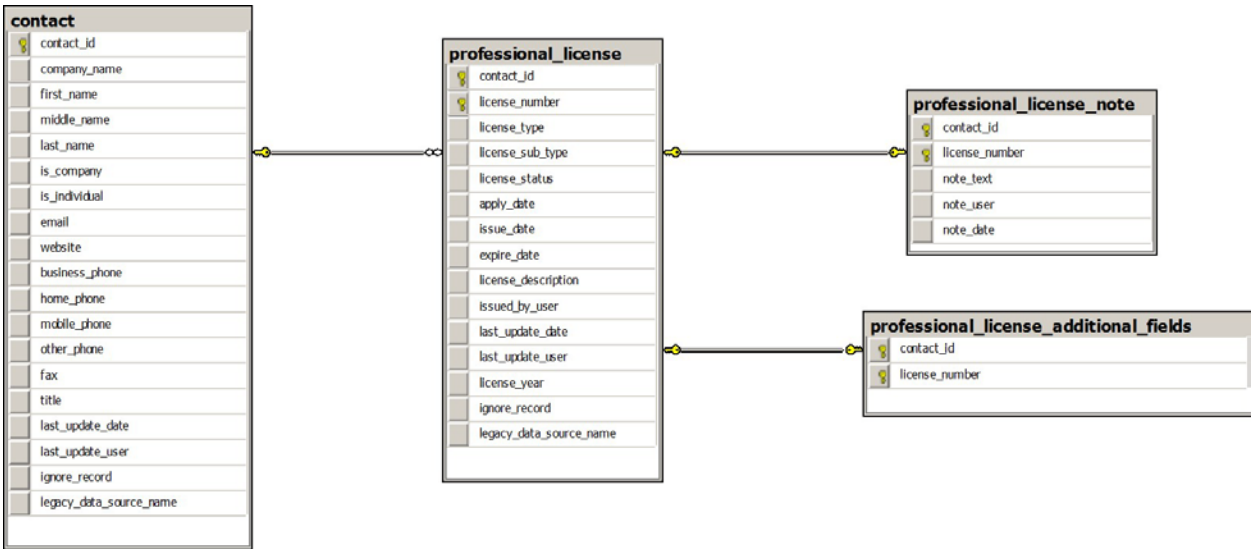
Usually a license related to an individual or contractor of some sort.

professional_license_note

Simply a place for logging memos on the license.

professional_license_additional_fields

Add any other fields which are not provided in the template model.


contact
contact_id
company_name
first_name
middle_name
last_name
is_company
is_individual
email
website
business_phone
home_phone
mobile_phone
other_phone
fax
title
last_update_date
last_update_user
ignore_record
legacy_data_source_name
professional_license
contact_id
license_number
license_type
license_sub_type
license_status
apply_date
issue_date
expire_date
license_description
issued_by_user
last_update_date
last_update_user
license_year
ignore_record
legacy_data_source_name
professional_license_note
contact_id
license_number
note_text
note_user
note_date
professional_license_additional_fields
contact_id
license_number

Business Licensing:

contact

See Contact Repository.

Business

The business table relates 1-to-1 with the contact table. This table simply holds extra attributes of the contact, and allows the contact to interact with the business license module of EnerGov as a business entity.

business_parcel

For integration with GIS, simply provide the parcel number (or PID) of the business location.

business_contact

For business contacts that link up to the master contact repository.

business_contact_no_key

For contacts that are not part of the master contact repository. These are usually stored as attributes of the business record in the legacy db (Applicant, Owner, Manager, President, etc.).

business_inspection

For routine inspections associated to business licenses.

business_license

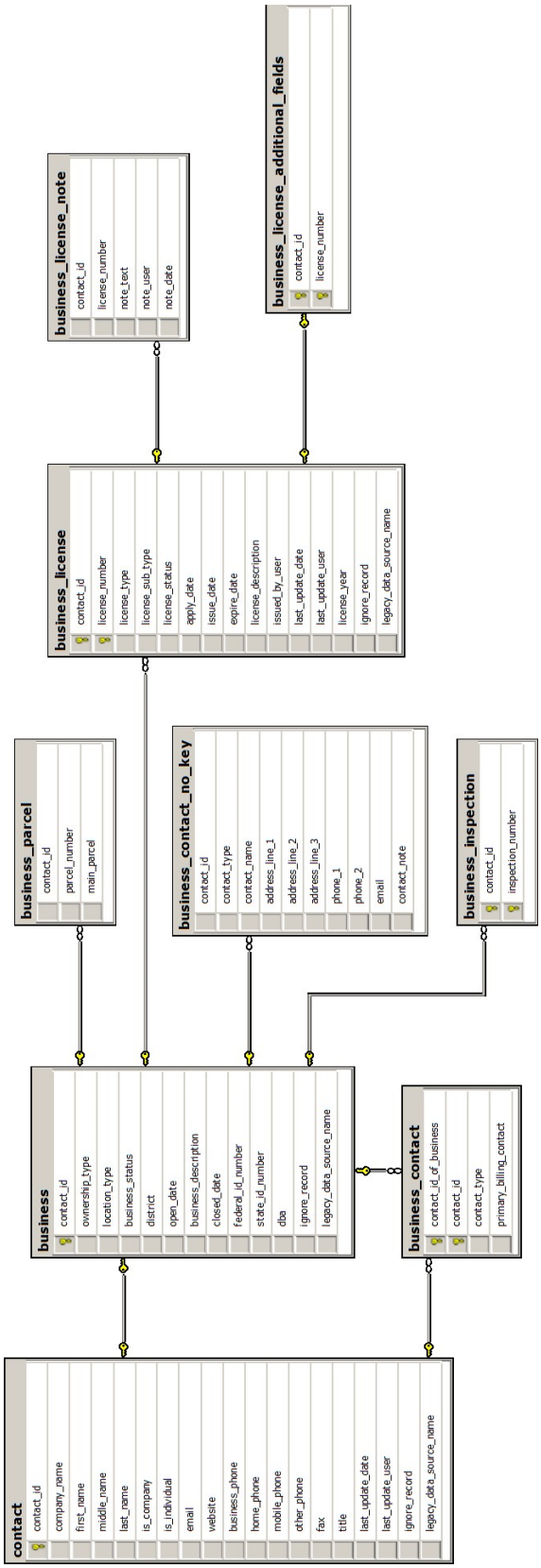
Holds licenses related to a company.

business_license_note

Simply a place for logging memos on the license.

business_license_additional_fields

Add any other fields which are not provided in the template model (at the license level).


business_license_note
contact_id
license_number
note_text
note_user
note_date
business_license_additional_fields
contact_id
license_number
business_license
contact_id
license_number
license_type
license_sub_type
license_status
apply_date
issue_date
expire_date
license_description
issued_by_user
last_update_date
last_update_user
license_year
ignore_record
legacy_data_source_name
business_parcel
contact_id
parcel_number
main_parcel
business_contact_no_key
contact_id
contact_type
contact_name
address_line_1
address_line_2
address_line_3
phone_1
phone_2
email
contact_note
business_inspection
contact_id
inspection_number
business
contact_id
ownership_type
location_type
business_status
district
open_date
business_description
closed_date
federal_id_number
state_id_number
dba
ignore_record
legacy_data_source_name
business_contact
contact_id_of_business
contact_id
contact_type
primary_billing_contact
contact
contact_id
company_name
first_name
middle_name
last_name
is_company
is_individual
email
website
business_phone
home_phone
mobile_phone
other_phone
fax
title
last_update_date
last_update user
ignore_record
legacy_data_source_name

Code Enforcement:

code_case

Self-explanatory.

code_case_address

The various addresses associated to the case. Address_type is available to distinguish different addresses (location, owner, etc.). code_parcel - For integration with GIS, simply provide the parcel number (or PID) of the case location.

code_case_contact

For case contacts that link up to the master contact repository.

code_contact_no_key

For contacts that are not part of the master contact repository. These are usually stored as attributes of the case record in the legacy db (Complainant, Owner, Tenant, etc.).

code_inspection

For inspections associated to code cases.

code_case_history_log

If history of updates to the case are really needed, they can be logged here.

code_case_note

Simply a place for logging memos on the case.

code_case_additional_fields

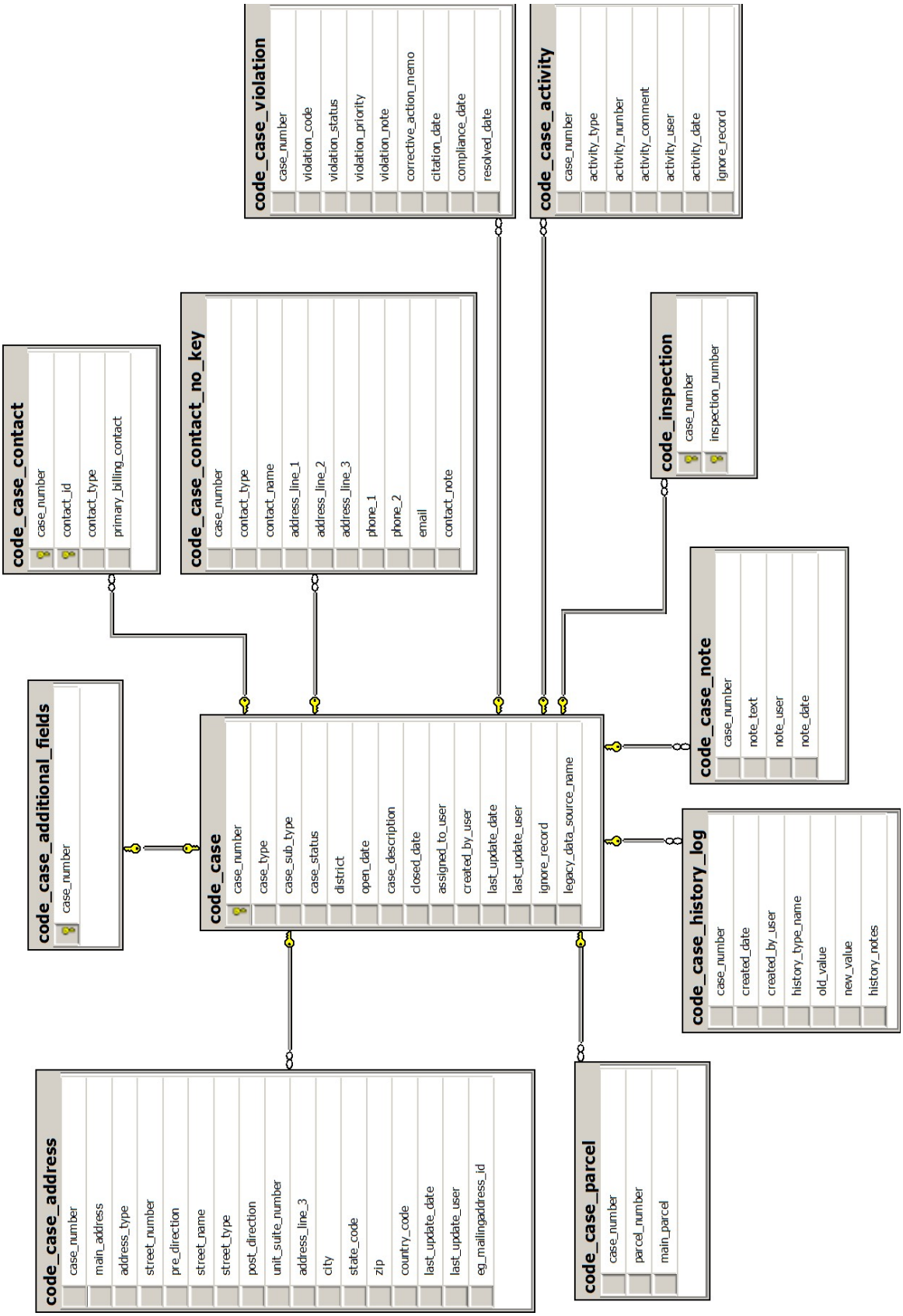
Add any other fields which are not provided in the template model (at the case level).

code_case_violation

Violations associated to the case. These usually reference city/county code numbers.

code_case_activity

A place to log various events that have occurred against the case.


code_case_contact
case_number
contact_id
contact_type
primary_billing_contact
code_case_contact_no_key
case_number
contact_type
contact_name
address_line_1
address_line_2
address_line_3
phone_1
phone_2
email
contact_note
code_case_violation
case_number
violation_code
violation_status
violation_priority
violation_note
corrective_action_memo
citation_date
compliance_date
resolved_date
code_case_activity
case_number
activity_type
activity_number
activity_comment
activity_user
activity_date
ignore_record
code_inspection
case_number
inspection_number
code_case_additional_fields
case_number
code_case
case_number
case_type
case_sub_type
case_status
district
open_date
case_description
closed_date
assigned_to_user
created_by_user
last_update_date
last_update_user
ignore_record
legacy_data_source_name
code_case_note
case_number
note_text
note_user
note_date
code_case_history_log
case_number
created_date
created_by_user
history_type_name
old_value
new_value
history_notes
code_case_address
case_number
main_address
address_type
street_number
pre_direction
street_name
street_type
post_direction
unit_suite_number
address_line_3
city
state_code
zip
country_code
last_update_date
last_update_user
eg_mailingaddress_id
code_case_parcel
case_number
parcel_number
main_parcel

Permits:

Permit

Self-explanatory. There is a parent-child relationship available within this table (for sub-permits).

permit_address

The various addresses associated to the permit. Address_type is available to distinguish different addresses.

permit_parcel

For integration with GIS, simply provide the parcel number (or PID) of the permit location.

permit_contact

For case contacts that link up to the master contact repository.

permit_contact_no_key

For contacts that are not part of the master contact repository. These are usually stored as attributes of the permit record in the legacy db (Applicant, Owner, Contractor, etc.).

permit_inspection

For inspections associated to permits.

permit_history_log

If history of updates to the permit are really needed, they can be logged here.

permit_note

Simply a place for logging memos on the permit.

permit_additional_fields

Add any other fields which are not provided in the template model (at the permit level).

permit_activity

A place to log various events that have occurred against the permit.

permit_hold

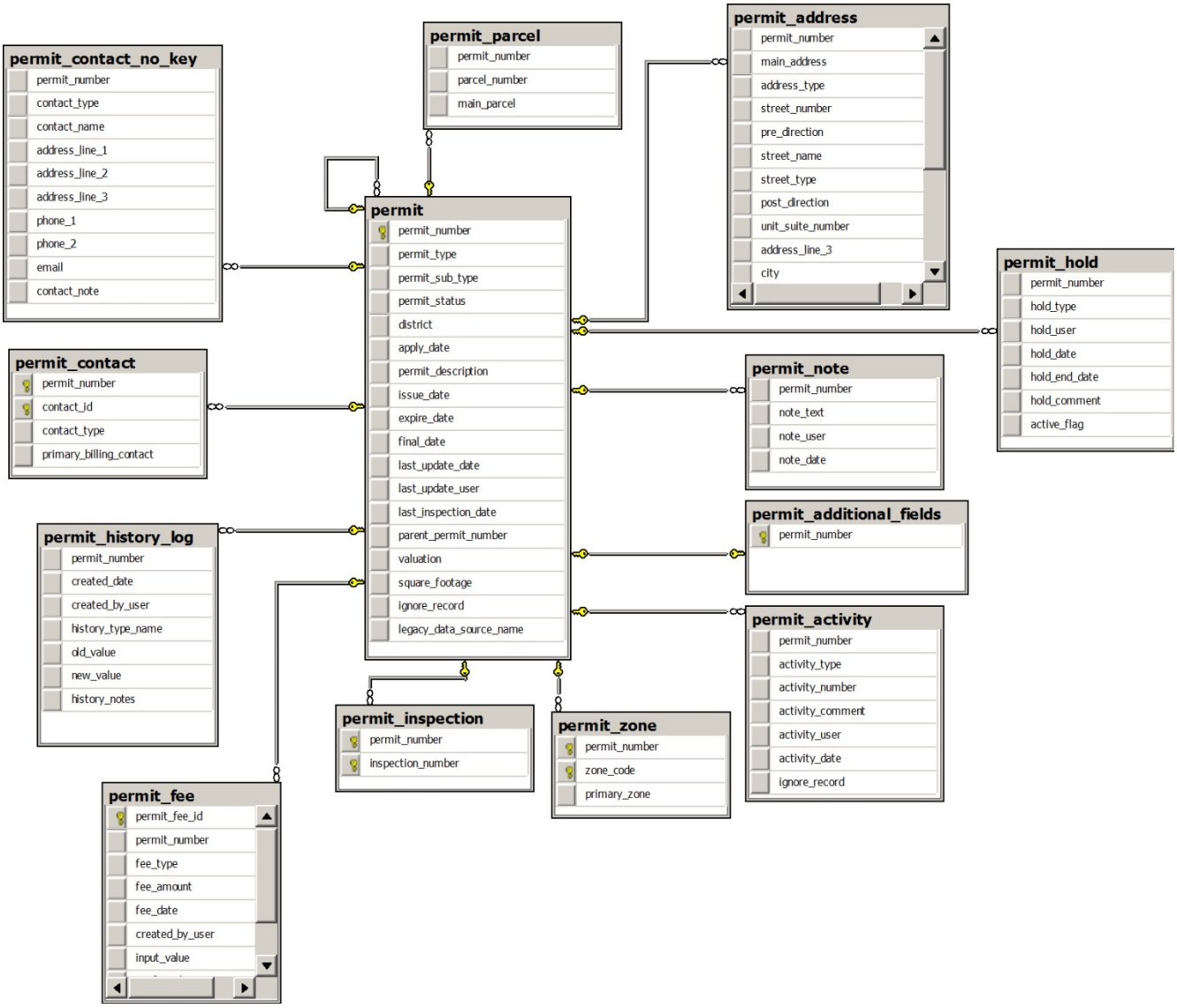
For instances where a stop work, or a hold was/is issued against a permit.

permit_zone

Simply provides a place to link zones to a permit. This is available, but is usually not used (custom fields are usually setup in EnerGov to hold zone codes of various types).

permit_fee

Simply shown for reference here. Also see the Financial Tables section.



Plans:

plan_case

Self-explanatory.

plan_address

The various addresses associated to the case. Address_type is available to distinguish different addresses.

plan_parcel

For integration with GIS, simply provide the parcel number (or PID) of the plan location. Where multiple parcels are on a case, one should be designated as the main parcel.

plan_contact

For case contacts that link up to the master contact repository.

plan_contact_no_key

For contacts that are not part of the master contact repository. These are usually stored as attributes of the case record in the legacy db (Applicant, Owner, Contractor, etc.).

plan_inspection

For inspections associated to cases.

plan_history_log

If history of updates to the case are really needed, they can be logged here.

plan_note

Simply a place for logging memos on the case.

plan_additional_fields

Add any other fields which are not provided in the template model (at the case level).

plan_activity

A place to log various events that have occurred against the case. For conversions, reviews would likely go here.

plan_hold

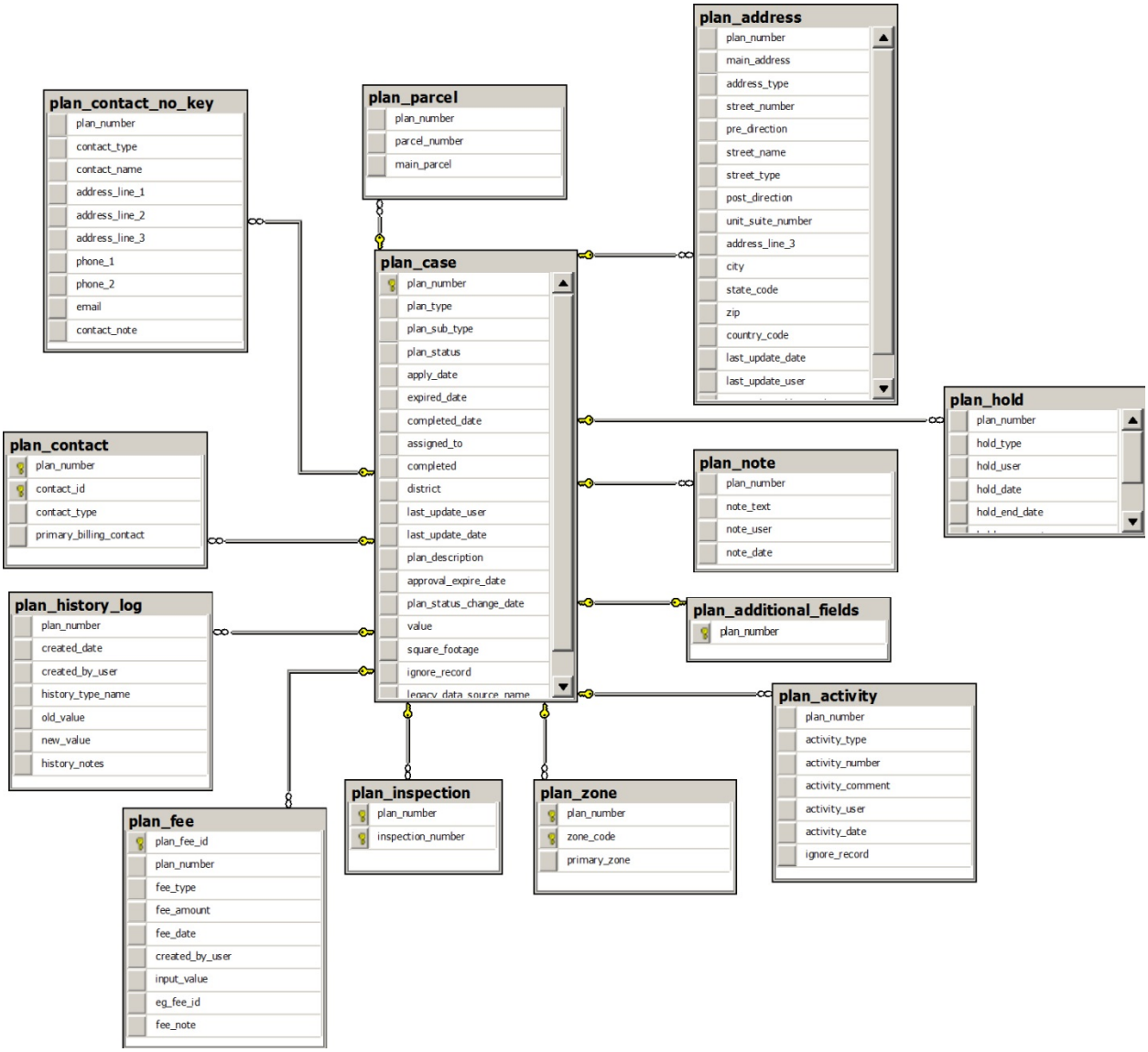
For instances where a stop work, or a hold was/is issued against a case.

plan_zone

Simply provides a place to link zones to a case. This is available, but is usually not used (custom fields are usually setup in EnerGov to hold zone codes of various types).

plan_fee

Simply shown for reference here. Also see the Financial Tables section.



Inspections:

Inspection

This holds the details of each inspection occurrence. Each inspection should be linked to the case that it relates to by using the cross reference tables below.

plan_inspection

For inspections associated to plan cases.

permit_inspection

For inspections associated to permits.

code_inspection

For inspections associated to code cases.

business_inspection

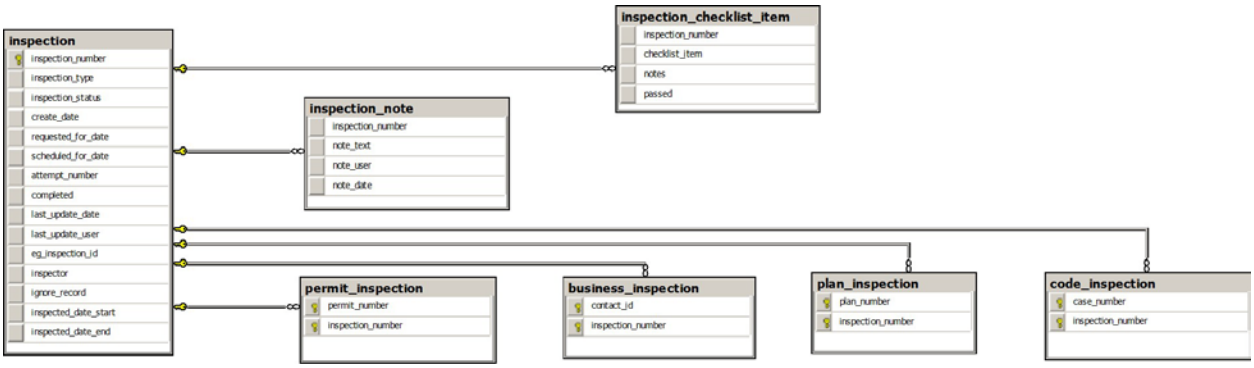
For inspections associated to businesses.

inspection_note

Simply a place for logging memos on the inspection.

inspection_checklist_item

These can be used for categorized checklist info, violations, etc.



Financial Tables:

permit fee

Holds the details for fees associated to permits.

plan fee

Holds the details for fees associated to plans.

payment

Records representing funds received.

payment_reversal

Records representing funds going back to a customer (or voided). The types of transactions here would likely be voids, NSFs, and refunds. These should be linked back to the original payment record that they are reversing.

permit_payment_detail

records the amount applied to each individual fee (line item) within a payment.

plan_payment_detail

records the amount applied to each individual fee (line item) within a payment.

permit_payment_reversal_detail

records the amount applied to each individual fee (line item) within a reversal.

plan_payment_reversal_detail

records the amount applied to each individual fee (line item) within a reversal.

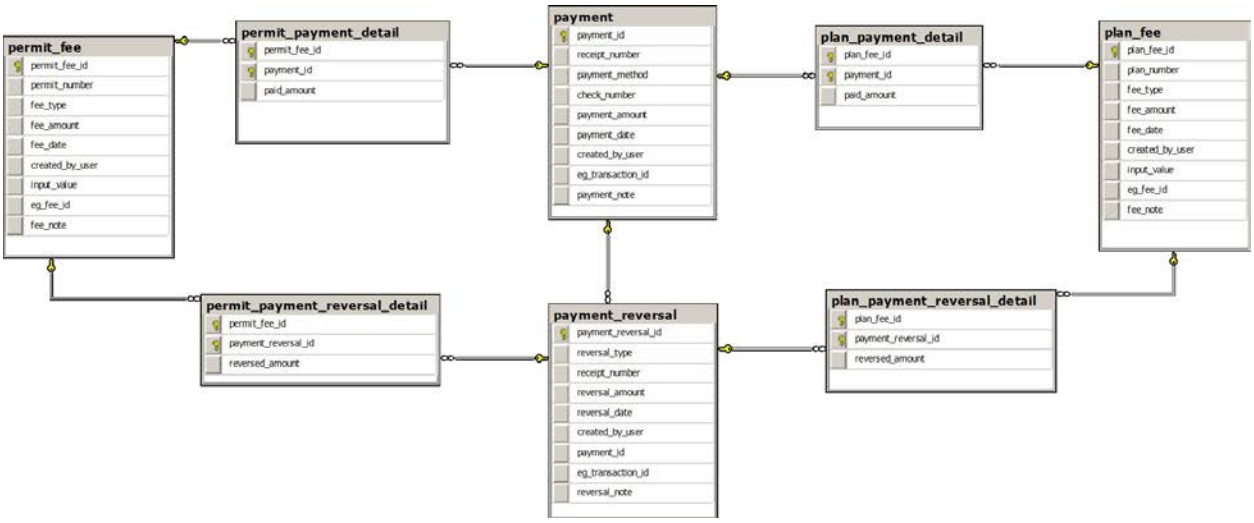

permit_fee
permit_fee_id
permit_number
fee_type
fee_amount
fee_date
created_by_user
input_value
eg_fee_id
fee_note
permit_payment_detail
permit_fee_id
payment_id
paid_amount
payment
payment_id
receipt_number
payment_method
check_number
payment_amount
payment_date
created_by_user
eg_transaction_id
payment_note
plan_payment_detail
plan_fee_id
payment_id
paid_amount
plan_fee
plan_fee_id
plan_number
fee_type
fee_amount
fee_date
created_by_user
input_value
eg_fee_id
fee_note
permit_payment_reversal_detail
permit_fee_id
payment_reversal_id
reversed_amount
payment_reversal
payment_reversal_id
reversal_type
receipt_number
reversal_amount
reversal_date
created_by_user
payment_id
eg_transaction_id
reversal_note
plan_payment_reversal_detail
plan_fee_id
payment_reversal_id
reversed_amount

Exhibit E

To Attachment A-3.1 of Project Plan - FIRE

Data Conversion Process

Los Angeles County Fire Department

Data Conversion Process for EnerGov Enterprise Server (Template DB Option)

Overview:

This document is an intro to the SQL Server EG_Template database and how to populate it.

Modularized Design:

As with the EnerGov software, the EG_Template db is sectioned off into modules. Each contains one master table at the top of the chain (ex. 'permit' for the Permit module). Within each module, there will be various child tables branching out below the master table for that module (ex. 'permit_address', 'permit_note', etc.).

There are tables that cross multiple modules. The most notable of these involve inspections and payment transactions.

Database diagrams have been included in the EG_Template database. These show the tables and their relationships for each module.

Required Fields:

There are certain fields in the EnerGov software which are required fields, and we cannot write records to the EnerGov db without populating these columns. Sometimes, these required fields will not be available in the legacy source data, so a simple default value can be written to the EG_Template db to fulfill any NOT NULL constraint.

Some of these fields are drop-down lists in EnerGov, which means that we will be restricted in the values that we can write to these required fields in the EnerGov db. For drop-down fields, there is no restriction on what can be written in the EG_Template db. So, exact spelling or careful matching to the EnerGov configured values is not an issue for fields that are destined for EnerGov drop-down fields. We will run these through a separate mapping table to translate the values to the appropriate EnerGov value during conversion. These mappings will be negotiated during the development phase of the conversion.

Custom Fields (any fields not available in the master table for the module in question):

Most legacy systems will have some attribute fields that are not specified in the corresponding master table within EG_Template. In EnerGov, we will refer to these as custom fields. Within each module, there will be a child table for such custom fields. Since these are specific to the legacy system(s), you may add columns to these tables in EG_Template to accommodate any needed custom fields in the migration. For example, 'permit_additional_fields' is the table for extra fields relating to the 'permit' records.

Gap Handling (where legacy data doesn't fit anywhere within EG_Template):

There are sometimes special features of a legacy system which EnerGov does not account for in the EG_Template db. We may have to work out a custom solution to handle these special cases.

Contacts:

This is always a big topic for data migrations. These generally fall into two categories:

1. Those contacts that were managed with each person/company having one contact record, which is kept up to date over time. As this person/company is associated with records over time (getting a business license, pulling permits, being associated to a code violation), that one contact record is attached to the permit, license, code case, etc. With this model, there is generally no duplication of contact records (except when created by mistake).

2. Contacts where the user keys the contact attribute info on each permit, case, license, etc. With this model, there is no single master record representing the contact itself. So, if a contact has been associated to 10 different permits over time, there would be 10 records with the contact attributes (each one will likely have slightly different values in the various fields like name, address, phone, etc.). With this model, there is considerable duplication of contacts.

In the EnerGov model, contacts are stored as in category 1 above. Those contacts put into EG_Template without a master 'contact' record link (category 2 above) will be migrated into custom field memo boxes to avoid duplication of contacts within the EnerGov contact repository.

For example, when populating the permit contacts, those contacts for category 1 should go into the 'permit_contact' table. Those contacts for category 2 should go into the 'permit_contact_no_key' table.

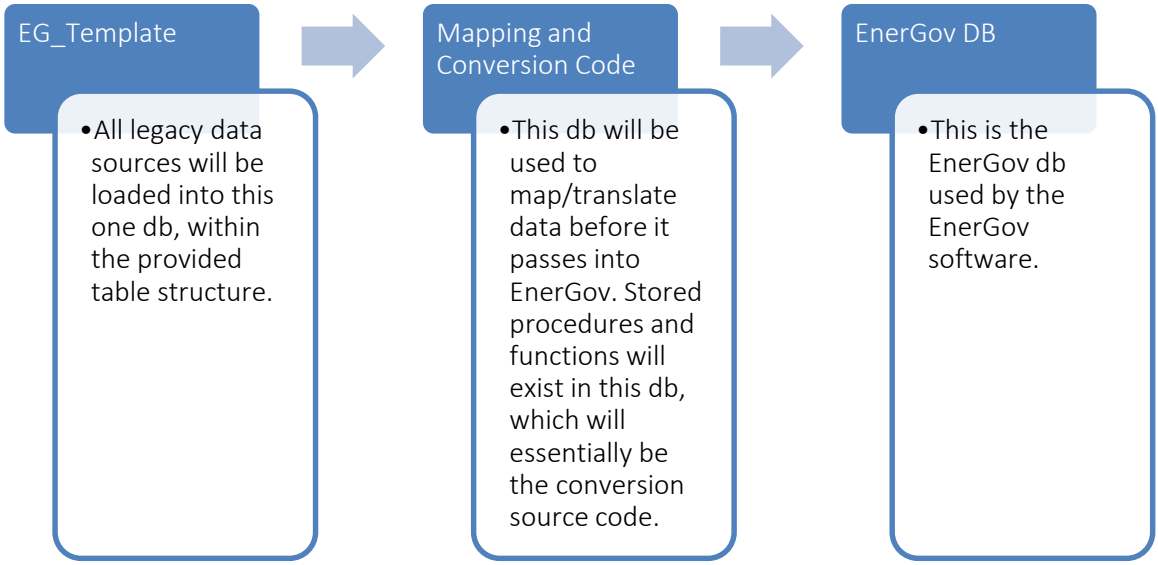
Multiple Legacy Data Sources:

There are usually multiple data sources to convert in a project. The plan is to have all data sources populated into the EG_Template db. At the main table level, there is an optional column where the legacy data source can be populated for reference. This is provided as a way to easily count up or research records originating from a particular legacy data source.

Overall Architecture of Conversion:

There are 3 SQL Server databases involved in the conversion process.

1. EG_Template (for legacy data)
2. EnerGov (the production EnerGov db)
3. A database containing all conversion processes and mapping tables. This is maintained by Tyler's data conversion team. This db takes the data from EG_Tempate, translates it, and populates it into the EnerGov db.



Progression of Conversion Development Process:

Step	Step Name	Responsible Party	Notes
1	Provide empty EG_Template database to client	Tyler	Database format will be SQL Server
2	Load legacy data into template database	Client	If there are multiple legacy data sources, all should be loaded into the one template SQL database.
3	Mapping process	Tyler /Client	Dependent on completed EnerGov configuration Spreadsheets will be used to communicate mapping values. Mapping questions may arise and both parties
4	Import-specific configuration changes to EnerGov	Tyler	Certain fields or values may need to exist for imported records only. These usually require some minor EnerGov configuration changes.
5	Customize conversion scripts	Tyler	Minor customization can be expected for many conversions, based on special requests from client.
6	Conversion execution	Tyler	Resulting EnerGov database will be provided to client team for review.
7	Review and either sign-off or request changes	Client	Client team will review the data and the interaction with it in the EnerGov software. If it meets the client's needs, sign-off will occur. If not, certain steps above may need to be repeated until client signs off on the

Progression of Final Conversion Cutover Process (Go-Live):

Step	Step Name	Responsible Party	Notes
1	Load legacy data into template database	Client	This should just be an up-to-date extract of the legacy data into the template db.
2	Conversion execution	Tyler	Resulting EnerGov database will be provided to client team. This will be the production EnerGov db.
3	Go Live	Tyler /Client	Verification of EnerGov db and site functionality - Data Conversion sign-off Move to production phase

Exhibit C-4

Pricing and Payment Schedule - Fire

Customized for

Los Angeles County Fire Department

PRICING AND PAYMENT SCHEDULE

All defined terms have the meaning set forth in the Base Agreement, except as otherwise defined herein or in Amendment No. 4

1.0 CONTRACT SUM

The Contract Sum shall be County's maximum payment obligation to Contractor for the Users added via Amendment No. 4 in one-time fees or annual fees payable by Contract Year (CY), for (i) the License fee, (ii) Implementation Services fees, (iii) Training Certifications, (iv) Maintenance and Support Services Fees, (v) annual subscription fees, and (v) Pool Dollars, if any, each of which is set forth below and payable on the schedule set forth in Section 2 (Payment Schedule).

The prices set forth below do not include taxes for which the County is responsible.

Fee Component	One-Time Fee	CY4 6/24/17-6/23/18	CY5 6/24/18-6/23/19	CY6 6/24/19-6/23/20	CY7 6/24/20-6/23/21	CY8 6/24/21-6/23/2022
A. Licenses	$224,492					
B. Implementation Professional Services	$550,150					
C. Estimated Travel Expenses	$50,000					
D. Training	$64,600					
E. Contingency (10%)	$88,924					
F. Annual Software Maintenance and Support			$40,409	$42,025	$44,127	$46,333
G. Annual Licensing			$50,000	$50,000	$50,000	$50,000
Totals	**$978,166**		**$90,409**	**$92,025**	**$94,127**	**$96,333**

2.0 PAYMENT SCHEDULE

A. LICENSE FEES

License fees shall be invoiced as follows:

(1) $112,246 (50% of total License fees) invoiced upon completion of the project kick-off meeting.

(2) $112,246 (50% of total License fees) invoiced upon the earlier of software installation in production environment or 120 days from the Amendment No. 4 Effective Date.

B. IMPLEMENTATION SERVICES

Implementation Services shall be invoiced on a monthly basis for the hours delivered in the prior month, subject to a ten percent (10%) retention. Retained amounts over the course of a Stage, as defined in the Project Plan (Attachment A-2.1), shall be released upon Stage sign-off, which sign-off shall not be unreasonably withheld.

C. TRAINING CERTIFICATIONS

Training Certifications ($64,600) will be invoiced when delivered.

D. MAINTENANCE AND SUPPORT SERVICES

Maintenance and Support Services Fees will be invoiced annually in advance of the Contract Year, beginning one (1) year from the Amendment No. 4 Effective Date, and thereafter in advance of the upcoming Contract Year, at the rates set forth in Section 1 of this Exhibit. Maintenance and Support Services Fees for any Extended Term shall be invoiced on the subsequent Contract Year anniversar(y)(ies) at Tyler's then-current rates, or at such other rates to which the parties may otherwise mutually agree.

E. ANNUAL SUBSCRIPTION FEES

Annual subscription fees, if any, will be invoiced annually in advance, beginning at Contract Year 5 (June 24, 2018-June 23, 2019) and thereafter in advance of the upcoming Contract Year, at the rates set forth in Section 1 of this Exhibit. Annual subscription fees for any Extended Term shall be invoiced on the subsequent Contract Year anniversar(y)(ies) at Tyler's then-current rates, or at such other rates to which the parties may otherwise mutually agree.

F. TRAVEL EXPENSES

Contractor has estimated travel expenses to be $50,000. Contractor will invoice its actual travel expenses on a monthly basis, as incurred under Contractor's then-current

Business Travel Policy, plus a 10% agency processing fee. Contractor's current Business Travel Policy is attached to Exhibit C-1 at Attachment C.1.

G. POOL DOLLARS FOR ADDITIONAL WORK/APPLICATIONS

All payments for or related to Additional Services and/or Additional Applications approved and paid by County shall correspondingly reduce the remaining Pool Dollars available. The quoted Pool Dollars is not a commitment or offer on the part of the County to spend such amounts for Additional Services, Additional Applications, or other expenses incurred or deliverables provided.

3.0 LICENSE - PRICING DETAIL

Application Software	Quantity	Per-Unit Price	Total Price	Comments
Permitting & Land Management (PLM) Suite	59	$2,500	$147,499	Entitles up to 59 Fire Users to a License of the PLM Suite, as further defined in the Base Agreement.
Intelligent Automation Agent (IAA)	1	N/A	N/A	Included in Fire's License of the PLM Suite: server-side plugin for post processing and proactive event handling automation.
Odata / Social IOE	1	N/A	N/A	Included in Fire's License of the PLM Suite: Open data services / server-side plugin for enabling social media integration (Facebook/Twitter) and built-in Esri map views
Framework Enabling Products & Extensions				**Extensions to Fire Enterprise License**
EnerGov eReviews	1	$50,000	$50,000	Includes ePlan/Doc mgmt and external submission portal - Based on Population * Bluebeam licenses not included. An LA County wide license will be capped at $149,999 total for all departments within the County. $100,000 of this total has been split between DRP & DPW.
GIS Integration - EnerGov GIS	59	$500	$10,000	A County-wide license will be capped at $120,000 total for all

				departments within the County. All new users outside DRP & DPW will be charged $500 per user up to the $120,000 County-wide license amount.
iG Workforce App	7	$999	$6,993	An LA County wide license will be capped at $249,999 total for all departments within the County. All new users of the iG Workforce Apps will be charged the $999 per user rate up to the $249,999 cap.
VirtualPay	1	N/A	N/A	Included
Citizen Connected Products and Additional Citizen Components				***Based on Product License / Agency Population (10,000,000)**
EnerGov Citizen Access Web Portal	1	N/A	N/A	Included
EnerGov Decision Engine	1	$10,000	$10,000	An LA County wide license will be capped at $100,000 total for all departments within the County. New departments will be charged $10,000 per department, if the business requirements leverage the EnerGov Decision Engine.
TOTAL			**$224,492**	

4.0 PROFESSIONAL SERVICES - PRICING DETAIL

Professional Services	Quantity	Blended rate	Total Price	Comments
Total Estimated Professional Services Resources	**2,720**	$170	**$462,400**	Quantity is quoted in hours; works out to 340 days. Hours breakdown is provided in Attachment A-2.1 ("Tyler Resources Purchased").
Estimated Travel Expenses (Based on weekly onsite trips)	**25**		**$50,000**	Actual expenses to be incurred under Tyler's then-current Business Travel Policy, plus a 10% agency processing fee.
Other	**Hours**	Hourly Rate	**Total**	
Training Certification	380	$170	$64,600	Pre-Project training & End User Training & Onsite Production Support
Data Conversion Services	300	$225	$67,500	Data conversion- 1 consolidated source
Report Writing Services			$20,250	3 custom reports; 5 letters and forms; 10 dynamic report modifications
TOTAL			**$664,750**	
Annual Maintenance and Support			**Base Price**	
Annual Maintenance and Support Services			**$40,409**	
iG Apps Subscription			**$50,000**	
TOTAL			**$90,409**	

5.0 ADDITIONAL APPLICATIONS AND ADDITIONAL SERVICES- PRICING DETAIL

Permitting and Land Management (PLM) Suite	**$2,500**/named user	County may purchase named-user Licenses for other County Departments in the event the Users exceed a cap of 800 named users (200 for DRP and 600 for DPW), as set forth in the Base Agreement.
Licensing & Regulatory (LRM) Suite	**$2,500**/named user	County may purchase named-user Licenses for other County Departments in the event the Users exceed a cap of 50 named users (0 for DRP, 50 for DPW and 0 for DPR), as set forth in the Base Agreement.
EnerGov eReviews	**$49,999**	A County-wide license to EnerGov eReviews will be capped at $149,999, with $100,000 of that total already allocated to DRP ($50,000) and DPW ($50,000).
EnerGov GIS	**$10,000** per County Department or **$500**/named user	A County-wide license to EnerGov GIS will be capped at $120,000, with $50,000 of that amount already allocated to DRP.

EnerGov Citizen Access Web Portal	**$0**	A County-wide license to the Citizen Access Web Portal will be capped at $100,000 for all County Departments, with that capped amount already met by DPW ($50,000) and DRP ($50,000)
EnerGov's Decision Engine	**$10,000** per Department	A County-wide license will be capped at $100,000, with participating Departments choosing to leverage the Decision Engine, with $20,000 of that capped amount already allocated to DPW ($10,000) and DRP ($10,000).
IG Workforce Apps	**$999** per User	A County-wide license will be capped at $249,999, with $199,999 of that amount already allocated to DPW ($149,999) and DRP ($50,000).
Additional Services	$170/hour $225/hour $250/hour	$170/hour: Implementation Consultant $225/hour: Data & Integration Services $250/hour: Custom Development

* Pricing for Additional Services shall be available at the rates set forth above for twenty-four (24) months from the Effective Date of Amendment No. 4.

6.0 CONSOLIDATED FEE SCHEDULE FOR DRP, DPW DPR, & DISTRICT

For the County's reference, the parties agree that the following chart summarizes the fees and general payment terms, individually and combined, for the DRP, DPW, DPR, and District, licenses and services purchases under the Base Agreement. Additional pricing details specific to DRP and DPW are set forth at Exhibits C-1 and C-2, respectively.

Consolidated Fee Schedule for DRP, DPW, DPR & Fire

DRP:	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Total
	License	$ 709,999	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 709,999
	Implementation Services	$ 656,472	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 656,472
	Training Certifications	$ 3,998	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 3,998
	Maintenance & Support Services	$ -	$ -	$ 132,000	$ 135,960	$ 140,039	$ 145,641	$ 151,467	$ 159,040	$ 166,992	$ 1,031,139
	Annual Subscriptions	$ -	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 400,000
	Estimated Travel Expense	$ 78,540	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 78,540
	Pool Dollars	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 212,300
DRP Contract Total		$ 1,449,009	$ 50,000	$ 182,000	$ 185,960	$ 190,039	$ 195,641	$ 201,467	$ 209,040	$ 216,992	$ 3,092,448

DPW:	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Total
	License	$ 1,944,991	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 1,944,991
	Implementation Services	$ 3,755,280	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 3,755,280
	Training Certifications	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Maintenance & Support Services	$ -	$ -	$ -	$ 350,098	$ 360,601	$ 375,025	$ 390,026	$ 409,527	$ 430,004	$ 2,315,281
	Annual Subscriptions	$ -	$ -	$ -	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 300,000
	Estimated Travel Expense	$ 443,700	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 443,700
	Pool Dollars	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 781,972
DPW Contract Total		$ 6,143,971	$ -	$ -	$ 400,098	$ 410,601	$ 425,025	$ 440,026	$ 459,527	$ 480,004	$ 9,541,224

DPR:	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Total
	License	$ 30,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 30,000
	Implementation Services	$ 175,876	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 175,876
	Training Certifications	$ 20,400	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 20,400
	Maintenance & Support Services	$ -	$ -	$ -	$ -	$ 6,930	$ 7,207	$ 7,495	$ 7,870	$ 8,264	$ 37,767
	Annual Subscriptions	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Estimated Travel Expense	$ 17,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 17,000
	Pool Dollars		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 26,491
DPR Contract Total		$ 243,276	$ -	$ -	$ -	$ 6,930	$ 7,207	$ 7,495	$ 7,870	$ 8,264	$ 307,533

Fire:	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Total
	License	$ 224,492	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 224,492
	Implementation Services	$ 550,150	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 550,150
	Training Certifications	$ 64,600	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 64,600
	Maintenance & Support Services	$ -	$ -	$ -	$ -	$ -	$ 40,409	$ 42,025	$ 44,127	$ 46,333	$ 172,894
	Annual Subscriptions	$ -	$ -	$ -	$ -	$ -	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 200,000
	Estimated Travel Expense	$ 50,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 50,000
	Pool Dollars		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 88,924
Fire Contract Total		$ 889,242	$ -	$ -	$ -	$ -	$ 90,409	$ 92,025	$ 94,127	$ 96,333	$ 1,351,060

Combined DRP, DPW, DPR and DoFire Totals		$8,725,498	$ 50,000	$ 182,000	$ 586,058	$ 607,570	$ 718,282	$ 741,013	$ 770,564	$ 801,532	$ 14,292,265

3% increase

4% increase

5% increase

7.0 PRICING DETAIL FOR INTERFACES

Not applicable.

Exhibit D-3

Project Schedule - Fire

Customized for

Los Angeles County Fire Department

Below is a high-level schedule estimating the duration of Project Plan Stages, as defined in Exhibit A, Attachment A-3.1 (Project Plan – Fire). Once finalized and approved by authorized representatives of both parties during Stage 1 (Initiation and Planning), the final Project Schedule shall become part of this Exhibit D-2, as if fully set forth herein

Fire

Stage 1:	1 months
Stage 2:	3 month
Stage 3a:	1 month
Stage 3b:	1 month
Stage 4:	2 month
Stage 5a:	1 months
Stage 5b:	1 months
Stage 6:	1 months
Stage 7:	1 months
Total:	**12 months**

Exhibit E-3

In accordance with Section 14 of the Amendment, an Exhibit E-2 (Administration of Agreement – FIRE) shall be prepared during kick-off of the FIRE Implementation Services, as set forth in Paragraph 4.1 of the Agreement.

Exhibit F
Schedule 1

Acceptance Sign Off

Tyler Technologies Use Only
☐ Deliverable does NOT denote a payment milestone
☐ This deliverable denotes a payable milestone. Amount Due: $0.00

Client:

Date:

Visit/Deliverable:

Deliverables	Performed By	Notes
Additional Signoff Notes:		

☐ I am satisfied with the work performed for this stage, and/or deliverable.

☐ I am NOT satisfied with the work performed for this stage, and/or deliverable.

In an effort to ensure quality and complete satisfaction with each phase of the project Tyler Technologies' Professional Services division has established the following rules:

1. Projects will not be allowed to move from one phase to another without a sign off indicating satisfaction with the work performed. The Tyler Technologies' project team will immediately stop all other tasks, complete the phase at hand, and obtain sign off before moving to the next phase.

2. Customer understands that any payment not received within 30 days of invoice will result in work stoppage. All related project tasks will be stopped until payment is received.

Print Name: _____

Signature: _____

Date: _____

(Please return signed copy to the Tyler Technologies project team)

Customer Notes:

Exhibit F
Schedule 2

Change Order Form

Client: _____ Date: _____

Generated By: _____

Authorized By: _____

Change Overview:

Narrative Description of Change:

Impact of Change:

Schedule Impact: Delay of milestone & sub-tasks on Tyler Technologies Implementation Project Plan including:

Task	Proposed Date Changes

Cost Impact:

Change Detail	Credit	Debit	Total

Revision No.: _____

No changes may be made to this project without the agreement of the Project Manager(s), and must be approved by the Project Director. Submit endorsed Change Order to the Tyler Technologies' Project Manager

Date Approved	Comments	Approved By	Signature

Exhibit F
Schedule 3

Custom Programming Request Form

Client:	
Date of Request:	
Contact Name:	
Expiration Date:	(Quote is valid for 30 days)

Feature Request

[Short Narrative Here]

Option 1 – [Custom Programming Item Name], [Hour Estimate]

[Details here]

Tyler Technologies Use Only

		Impact Fee:	$0
Development Hours:	0	Development:	$0
Estimated Release Date:	See Dates Below	Implementation Cost:	$0
Estimated Release Version:	See Dates Below	Training Cost:	$0
		Documentation Cost:	$0
		Total Cost:	$0

R&D Authorization: _____
Sales Rep Authorization: _____ Total Cost: $0
Authorized: _____

Release Schedule

Release Schedule	Estimated Date
[EnerGov Software Beta Release date]	DATE
[EnerGov Software RC Release date]	DATE
[EnerGov Software Gold Release date]	DATE
* Release dates are subject to change	

Accepted and Ordered by Customer:

Signature:	
Name (print):	
Title:	
Date:	

Please sign, date and return by fax:

Tyler Technologies, Inc.

ATTACHMENT III

William S. Kehoe
CHIEF INFORMATION OFFICER

Office of the CIO

CIO Analysis

DATE:

6/4/2018

SUBJECT:

AMENDMENT NO. 4 TO AGREEMENT NO. 78227 FOR THE ELECTRONIC PERMITTING AND INSPECTIONS COUNTY OF LOS ANGELES SYSTEM

CONTRACT TYPE:

☐ New Contract ☐ Sole Source ☒ Amendment to Contract #: 78227

SUMMARY:

Description: This Board letter is to request the Board of Supervisors (Board) approval of Amendment No. 4 to Agreement No. 78227 with Tyler Technologies, Inc. (Tyler) to expand the scope of the Electronic Permitting and Inspections County of Los Angeles (EPIC-LA) system to include the workflows related to the Consolidated Fire Protection District's (the District or Fire) land development, fire engineering, forestry, and environmental impact reviews required by County Code Title 32.

The Board letter also recommends an extension of the term of the Agreement by two years. Combined with two optional one-year extensions previously approved by the Board, the maximum contract term would be through June 23, 2022. By extending the base term by two years, the maximum contract sum will need to be increased to account for the additional maintenance and support costs during the extended period. Regional Planning has confirmed the respective obligations with each of the EPIC-LA departments, who will plan for the costs in their operating budgets.

The Office of the Chief Information Officer (OCIO) supports the expansion of EPIC-LA to include the District. It not only is consistent with the Request for Proposals that led to this Agreement in 2014, it helps to improve an increasingly integrated and electronic workflow for the land entitlement process for the County through features such as an online customer portal, status tracking, online document submissions, electronic clearances and comments, online payment, and reporting. Finally, this project will enable the decommissioning of an at-risk legacy tracking system used by Fire (the Electronic Development and Permit Tracking System, eDAPTS), which was implemented in 2004 and is now out of support.

Amendment Amount: **$2,732,756**

Term Extension: **2 years**

FINANCIAL ANALYSIS:

Contract Costs:

Amendment No. 4, One-Time Costs to the District

Licenses ..... $ $224,492

Implementation Services	$	$550,150
Training Certifications	$	$64,600
Tyler Estimated Travel Expense	$	$50,000
Pool Dollars	$	$88,924
Total Amend. No. 4, One-Time Costs to District:	**$**	**$978,166**
Amendment No. 4, Maintenance & Support (M&S) Costs through June 23, 2020 [1]		
Fire District	$	$182,434
Total Amend. No. 4, M&S Cost, Fire, to 6/2020:	**$**	**$182,434**
Amendment No. 4, Maintenance & Support (M&S) Costs for Both Optional Extensions [2]		
Regional Planning	$	$426,032
Public Works	$	$939,531
Parks and Recreation	$	$16,133
Fire District	$	$190,460
Total Amend. No. 4, M&S Cost for Options:	**$**	**$1,572,156**
TOTAL AMENDMENT NO. 4:	**$**	**$2,732,756**
Annual Non-Contract Costs:		
Estimated ISD Hosting [3]	$	262,554

Notes:

[1] The Maintenance and Support Services for Fire through June 23, 2020, at a cost previously negotiated for the other departments in Amendment Number 3. The other departments' costs are already reflected in the Maximum Contract Sum via Amendment Number 3.

[2] The Maintenance and Support Services for the additional two years requested to be added to the base term represents an increase of 5.0 percent compared to the pricing negotiated for the two-year extension included in the last Amendment. These costs will be applicable if both optional one-year extensions are exercised (June 2020-21 & June 2021-22, respectively).

[3] These costs are apportioned to the EPIC-LA participating departments by a percentage share of the Tyler licenses that each department holds. In the District's case, its share is estimated at $17,827 per year. This amount will vary depending on computing resources needed to support EPIC-LA, ISD's current rates, and the number of licenses departments hold compared to the County's aggregate licenses.

RISKS:

1. Since the District's workflows and processes are currently handled outside of EPIC-LA, through a combination of manual processes and the use of legacy system (eDAPTS) workflows, there is a risk that the replacement system (EPIC-LA) will not adequately address the needs of the District. This is mitigated by the District's careful vetting of the functionality

of Tyler's EnerGov software, prior training of Fire staff, and usage of EPIC-LA (albeit in a more limited fashion than is proposed in this Amendment), and strong engagement between all parties (Fire Prevention Division, Information Management Division, the other departments participating in EPIC-LA, the EPIC-LA Governance Committee, and Tyler). There is also an Assess & Define phase of the project to confirm the business processes and project definition before proceeding.

2. This is not a fixed-fee engagement, which introduces cost, quality, acceptance and schedule risks. These risks have mitigation measures, including time and cost estimates for each stage of the estimated seven-month project. This is especially true because the Scope of Work includes assessment of business processes to ensure that all required business functionality is addressed, which could require additional work beyond what is currently expected. The project includes contingency of 10 percent ($88,924) to account for any unanticipated work. The District's Project Manager will provide a monthly written report to the District's executive sponsor, identifying any project cost, quality, or schedule issues. Finally, the District will keep the Board informed as to the progress of the implementation via the on-going EPIC-LA 120-day report backs.

3. Due to the complexity of the implementation project, OCIO recommends a strong project governance and a dedicated County Project Manager to ensure adherence to schedule and budget, to manage change requests, to manage the Contractor's performance, and to represent the needs and acceptance of the business users of the District's Fire Prevention Division. The District has articulated a project governance team that includes a Deputy Fire Chief as the executive sponsor, a Battalion Chief representing the business owner, the Departmental Chief Information Officer, and an Information Technology Manager who will be the County Project Manager. The executive sponsor, business owner, and Project Manager identified are members of the EPIC-LA Governance Committee. Although the OCIO recommends a dedicated Project Manager for the duration of the project, the section manager of the Information Management Division section that provides project managers for IT projects will be personally managing this critical project. OCIO recommends that the District's project governance team closely monitor and provide any needed assistance to the Project Manager, who will have other management/supervision duties beyond this project.

4. The District currently uses an obsolete system (eDAPTS) that is hosted by the Department of Public Works (DPW) which is no longer supportable as of this year. After DPW migrated off of eDAPTS, Fire is the only remaining user. eDAPTS was identified as a major risk in the 2009 Woolpert and 2015 Gartner Consulting reports. By migrating to EPIC-LA, the District can take advantage of an established and proven system that strongly aligns with the other departments that rely upon the Fire District's reviews. By moving away from the legacy eDAPTS system to EPIC-LA, there are also significant efficiency and customer service benefits related to online status tracking, electronic clearances, online document submittal, and online fee payment.

5. While no security risks associated with the Amendment have been identified, the Fire District implementation will take advantage of the established EPIC-LA architecture,

including the use of the County-approved payment processor and the ISD private eCloud service for hosting. The County has extensively vetted these environments and designs.

6. While no contract risks with the Amendment have been identified, County Counsel participated in its negotiation and has approved the Amendment as to form.

PREPARED BY:

ERIC SASAKI, DEPUTY CHIEF INFORMATION OFFICER — DATE: 6/4/2018

APPROVED:

WILLIAM S. KEHOE, COUNTY CHIEF INFORMATION OFFICER — DATE: 6/4/2018