

AGR16-701-A1

**AMENDMENT NO. 1
INCORPORATED COUNTY OF LOS ALAMOS
LICENSE AND SERVICE AGREEMENT NO. AGR16-701**

This **AMENDMENT NO. 1** ("Amendment") is entered into by and between the **Incorporated County of Los Alamos**, an incorporated County of the State of New Mexico ("County"), and **Tyler Technologies, Inc.**, a Delaware corporation ("Contractor" or "Tyler"), to be effective for all purposes October 1, 2021 (the "Amendment Effective Date").

WHEREAS, County and Contractor entered into Agreement No. AGR16-701, dated June 15, 2016, for Enterprise Resource Planning System and Related Implementation Services ("ERP"); and

WHEREAS, the County Chief Purchasing Officer has determined that procurement of additional products "Tyler Notify" and "Tyler Incident Management" and associated implementation and maintenance services may be obtained in accordance with Section E(1)(o) and Exhibit "A" of the Agreement; and

WHEREAS, subsequent to the effective date of the Agreement, the product option identified as Tyler Incident Management was rebranded as Tyler311™ and is now referred to as Tyler 311/Incident Management;

WHEREAS, Tyler 311/Incident Management can be bundled with MyCivic™, which is then referred to as the MyCivic Bundle; and

WHEREAS, in accordance with Section E(1)(o) of the Agreement, Exhibit "M" identifies the current rates for the procurement of these optional products and services; and

WHEREAS, the County seeks to purchase "Tyler Notify" and "MyCivic Bundle", which includes "Tyler 311/Incident Management", as additional products pursuant to the Agreement; and

WHEREAS, in County Council Special Session at a public meeting held on April 27, 2020, County Council approved item D61 in FY2021 Budget Options for Customer Relations Management functionality to include ability to manage citizen contact, record and track issues through to resolution, and provide agent console and manager dashboard; and

WHEREAS, the Board of Public Utilities recommended approval of this Amendment at a public meeting held on September 15, 2021; and

WHEREAS, the County Council approved this Amendment at a public meeting held on September 28, 2021.

NOW, THEREFORE, for good and valuable consideration, County and Contractor agree as follows:

- I. Delete **Section A. DEFINITIONS**, "**Defect**" in its entirety and replace it with the following:



LACF2021-0247 10/01/2021 09:40 AM
Page(s): 58 Naomi D Maestas - County Clerk
Los Alamos County, NM TORI MONTTOYA - Deputy



“Defect” refers to a failure of the Licensed Property to materially conform to the functional requirements set forth in the Contractor’s Response To Functional Requirements Matrix and in the In Scope Program Modifications, Exhibits “H” and “I,” respectively, attached hereto and made a part hereof for all purposes, or their functional equivalent, or a failure of the Hosted Software to materially conform to the functional requirements set forth in Contractor’s current Documentation. Future functionality may be updated, modified, or otherwise enhanced through Contractor’s maintenance and support services, and the governing functional descriptions for such future functionality will be made available in Contractor’s then-current Documentation. Future functionality changes shall not eliminate the functional requirements set forth in Exhibits “H”, “I,” and “N.”

- II. Delete **Section A. DEFINITIONS, “Documentation”** in its entirety and replace it with the following:

“Documentation” refers to any online or written documentation related to the use or functionality of the Licensed Property or Hosted Software, as applicable, that Contractor provides or otherwise makes available to County, including instructions, user guides, manuals, documentation of reporting views, and other training or self-help documentation.

- III. Delete **Section A. DEFINITIONS, “Licensed Property”** in its entirety and replace it with the following:

“Licensed Property” refers to all Contractor software products, except the Hosted Software, identified in the Product and Rate Schedule, Exhibits “A” and “M” attached hereto and made a part hereof for all purposes, and any related interfaces, custom modifications, and product upgrades, as set forth in Section B(I)(1)(f).

- IV. Add the following new definitions to **Section A. DEFINITIONS**:

“Future State Decisions” refers to the project planning terminology describing how an organization envisions a solution will work, what it will do, and the best practices and processes a solution will utilize to accomplish the desired results.

“Hosted Software” refers to the Transparency Portal, Tyler Notify, and MyCivic Bundle software products hosted by Contractor according to the terms and conditions set forth in Section D(II) of this Amendment.

“MyCivic” refers to a citizen-facing, hosted, mobile app that integrates with Tyler 311/Incident Management.

“MyCivic Bundle” refers to the combination of MyCivic and Tyler 311/Incident Management products.

“Tyler 311/Incident Management” refers to a web-based integrated civic request management system that takes in requests from multiple channels, manages resolutions, and measures results. Tyler 311/Incident Management is the Munis integrated back-end interface of the MyCivicsolution, including the agent console. Tyler 311/Incident Management allows for collection of comprehensive citizen requests from the online portal, MyCivic mobile application, email, 311 calls, and walk-ins. Tyler 311/Incident Management allows for

integrated resolution workflows, insights, and reporting for internal stakeholders. Tyler 311/Incident Management allows for integration of MyCivic with Tyler Munis.

"Tyler Notify" refers to the hosted communications platform which enables the County to interact with citizens using various delivery channels and tools; including phone, email, and text messaging, as well as bilingual communication options.

- V. Add a new Subparagraph (a), (b), (c), (d), and (e) to SECTION C. IMPLEMENTATION SERVICES, Paragraph 1, as follows:

SECTION C. IMPLEMENTATION SERVICES:

1. IMPLEMENTATION PROJECT SCOPE.

- a) The Scope for the additional products "Tyler Notify" and "MyCivic Bundle" only, of which are subject to the terms and conditions of this Amendment, shall be comprised of the implementation, deliverables, project scope, and technical specifications as outlined below in Section C(1)(b) and in Exhibit "N," attached hereto and made a part hereof for all purposes. If any services, tasks, or responsibilities not specifically described in this Amendment are inherent or necessary sub-activities of the tasks, they shall also be included within this Scope.
- b) **Implementation.**
 - i) The Contractor shall, within ten (10) business days from the Effective Date of this Amendment, contact the County in order to initiate discussions of scheduling project activities, including scheduling a virtual kick-off meeting with the County's designated staff ("Project Staff"). Upon confirmation of the date of the virtual kickoff meeting, Contractor shall provide County with a written agenda, which shall include what Contractor requests the County complete prior to the kickoff meeting. As part of the kick-off meeting, the parties shall:
 - 1. Introduce assigned Contractor and County project team members and project leads ("Project Staff").
 - 2. Establish a mutually agreed upon Project Schedule that includes Production/Go-Live Launch Timeline, Deliverable Due Dates, Project Milestones, and Communication Protocols. Parties shall identify infrastructure needs for Tyler Notify, MyCivic311 Bundle, and integration needs for Tyler Munis and any other Tyler products to integrate with Tyler Notify and MyCivic 311 Bundle. Contractor shall provide a written memorandum to the County's Project Staff within thirty (30) days from the date of the kick-off meeting outlining the final agreed-upon Project Schedule. The Project Schedule may only be modified by mutual written agreement of the parties.
 - 3. Discuss the scope of work, planning assumptions, and project progression to meet County identified Production/Go-Live Launch Timeline.
 - 4. Identify data transfer methods between Contractor and County's Project Staff related to the performance of this Amendment.
 - 5. Establish dates, times, and methods for Contractor to perform installation of the Licensed Software.

- ii) Contractor shall provide remote services to County for the installation of Tyler Notify, which includes installation, configuration, and training of Tyler Notify on County's hardware.
 - iii) Contractor shall provide remote services to County for the installation of MyCivic311 Bundle, which includes installation, configuration, and training of MyCivic311 Bundle on hosted/SaaS supported hardware provided by Contractor.
- c) **Deliverables.** The project shall follow the stages identified below and Contractor shall conduct a meeting at the close of each stage to provide County with updates.
 - i) **Initiate and Plan:** Contractor shall provide a written memorandum to County within thirty (30) days following the kick-off meeting as identified in Section 1. Implementation(a)(ii) above, detailing Project Schedule, Scope of Work, and Planning assumptions. Contractor shall provide County with access to Project Portal. Contractor shall provide County with a Planning Report which contains Contractor's resource commitments, details of Contractor's key components of the project, responsibilities, and timeline.
 - ii) **Assess and Define:** Contractor shall assist County in determining future state decisions and configuration options to support future state decisions and provide a solution orientation report detailing configuration options and assumptions behind the proposed software configuration.
 - iii) **Installation:** Contractor shall install Licensed Software, which shall include the configuration of the Licensed Software. Contractor shall develop a solution validation test plan, review with County and update the plan as necessary.
 - iv) **Production Readiness:** Contractor shall provide County with a solution validation report, confirming that the Licensed Software performs as indicated in the solution validation plan. Contractor shall provide County with a go-live action plan and inform County of necessary go-live activities. Contractor shall conduct a go-live Planning Session with County Project Staff in preparation for launch of the Licensed Software. Contractor shall deliver end-user training to County Project Staff to demonstrate use of the software prior to go-live, as more particularly described in Exhibit "N".
 - v) **Production:** Contractor shall deliver the Licensed Software in a functional, live production state. Activities identified in the go-live action plan shall be completed by Contractor and County. All converted data shall be available in the production environment. Contractor shall provide County with all support documentation.
 - vi) **Close:** Contractor and County shall confirm no critical issues remain to be resolved. If any critical issues remain, Contractor shall resolve them in a timely manner. Contractor shall confirm that proper knowledge transfer to County Project Staff has been completed. All Contractor deliverables identified in the Planning Report, and through other scheduling meetings shall be completed.
- d) **Product Scope:** Tyler Notify and MyCivic311 Bundle shall provide the following features and functions:
 - i) 311 agent console features which shall enable County employees and departments to receive, direct, and monitor citizen requests, feedback, and complaints from time of receipt through resolution.

- ii) Functionality to support and manage citizen and County interactions occurring via phone, web, and mobile channels in a consistent manner.
 - iii) Provide citizens with the ability to communicate requests, feedback, and complaints to the County and to receive updates from receipt to resolutions of their issues.
 - iv) Enable County to proactively notify targeted citizens of public service announcements, changes to or disruptions in County services.
 - v) Enable County to develop and maintain contacts and interact with citizen communities with special interests such as service organizations, neighborhood associates, community clubs, and users of a specific service or facility.
 - vi) Track and allow reporting of statistical information related to citizen requests.
 - vii) Enable County to develop performance metrics and goals related to citizen requests.
 - viii) The ability for County to identify trends and possible service delivery gaps.
 - ix) The ability for County to target finite resources to improve citizen service delivery.
- e) **Technical Specifications:** The functionality requirements of the Licensed Software shall include, at minimum, the following, as described in Exhibit "H" and Exhibit "O", attached hereto and made a part hereof for all purposes.:
- i) Customer Contact Management CU63-CU82, CU5, CU34.
 - ii) Portals section IT148-150
 - iii) Self-Service Apps for Public Access section IT14.
 - iv) Communications for Emailing and SMS -texting, Web, letters, and notices to defined groups, event notification, citizen requests and workflow IT71, IT100, IT134, and IT137.
 - v) Online work requests WO34-WO35.

VI. Add a new **Subparagraph (a) to SECTION C. IMPLEMENTATION SERVICES, Paragraph 2**, as follows:

SECTION C. IMPLEMENTATION SERVICES:

2. IMPLEMENTATION SERVICES.

- a) Contractor shall provide the Implementation Services itemized in Exhibit "M" and described in Exhibit "N."

VII. Delete **SECTION D.I.2.** in its entirety and replace it with the following:

be required to purchase new releases of the Licensed Property and/or Hosted Software, including fixes, enhancements and patches;

VIII. Delete the section heading for **Section D.II.** in its entirety and replace it with the following:

II. SOFTWARE AS A SERVICE ("SaaS") AGREEMENT.

IX. Delete **SECTION D.II.1. RIGHTS GRANTED., SECTION D.II.2. OWNERSHIP., SECTION D.II.3. SOFTWARE WARRANTY., AND SECTION D.II.4.(a)** in their entirety and replace with the following:

1. **RIGHTS GRANTED.** Contractor shall grant to County the non-exclusive, non-assignable limited right to use the Hosted Software for so long as County is paying the annual SaaS fees associated with such Hosted Software. Service availability for the Hosted Software will be provided under the terms of the Service Level Agreement ("SLA"), Exhibit "B", attached hereto and made a part hereof for all purposes. County acknowledges that Contractor does not ship copies of the Hosted Software.
2. **OWNERSHIP.**
 - a) Contractor shall retain all ownership and intellectual property rights to the Hosted Software and Contractor's Services related thereto, and anything developed by Contractor under this SaaS Agreement.
 - b) County does not acquire under this SaaS Agreement any license to use the Hosted Software in excess of the scope and/or duration set forth herein.
 - c) Contractor shall provide County with a license to any Documentation related to the Hosted Software. The Documentation may be used and copied by County officials, employees or other agents for internal reference purposes only.
 - d) County shall retain all ownership and intellectual property rights to the data County provides for operation of, or maintenance in, the Hosted Software ("Data").
3. **SOFTWARE WARRANTY.** Contractor warrants that the Hosted Software will perform without Defects for so long as County pays its then-current annual SaaS fees for such Hosted Software. If the Hosted Software does not perform as warranted, Contractor shall use all reasonable efforts, consistent with industry standards, to cure the Defect in accordance with the Exhibit "B" and the Support Call Process, Exhibit "C" Schedule 1, attached hereto and made a part hereof for all purposes. Should Contractor be unable to cure the Defect, Contractor shall provide a functional equivalent. If Contractor cannot provide a functional equivalent, then Contractor will refund County previously paid but unused SaaS fees applicable to the Hosted Software.
4. **SAAS SERVICES.**
 - a) Contractor shall have fully-redundant telecommunications access, electrical power, and the required hardware to provide access to the Hosted Software in the event of a disaster or component failure. In the event any Data has been lost or damaged due to an act or omission of Contractor or its subcontractors or due to a Defect in the Hosted Software, Contractor shall use best commercial efforts to restore all the data on servers in accordance with the architectural design's capabilities and with the goal of minimizing any data loss as greatly as possible. In no case shall the recovery point objective ("RPO") exceed a maximum of twenty-four (24) hours from the declaration of a disaster by Contractor. For purposes of this subsection, RPO represents the maximum tolerable period during which Data may be lost, measured in relation to a disaster.

- X. Delete **SECTION E. COMPENSATION, Paragraph 1 only, not including the subparagraphs**, in its entirety and replace it with the following:

SECTION E. COMPENSATION:

1. **AMOUNT OF COMPENSATION.** The total amount payable under this Agreement for all Services and Products identified herein shall be in accordance with rates identified in Exhibits "A" and "M," attached hereto and made a part hereof for all purposes, and shall be payable according to the terms set forth below and, if applicable, as identified in Exhibit "L". The fees payable hereunder shall not exceed THREE MILLION FIVE HUNDRED NINETY-THREE THOUSAND THREE HUNDRED AND TWENTY-THREE DOLLARS (\$3,593,323.00), which amount does not include applicable New Mexico Gross Receipts Taxes ("NMGR").

- XI. Add new **Subparagraphs (p), (q), (r), and (s) to SECTION E. COMPENSATION, Paragraph 1**, as follows:

SECTION E. COMPENSATION:

1. AMOUNT OF COMPENSATION.

- p) County shall pay one-time compensation for software licenses fees for **Tyler 311/Incident Management** in an amount not to exceed TWENTY-TWO THOUSAND TWO HUNDRED AND SEVENTY-FIVE DOLLARS (\$22,275). License fees for **Tyler 311/Incident Management** shall be invoiced on the earlier of (i) the date when Contractor installs the Tyler 311/Incident Management software or (ii) forty-five (45) days after the Amendment Effective Date.
- q) County shall pay one-time compensation for Implementation Services, including project management services, for **Tyler Notify** and **MyCivicBundle**, in a combined amount not to exceed THIRTY-SEVEN THOUSAND EIGHT HUNDRED DOLLARS (\$37,800). These Implementation Services, including project management services, shall be invoiced as provided and/or incurred.
- r) Compensation for Tyler System Management Services for **Tyler 311/Incident Management** are waived for the period of time commencing on the Amendment Effective Date and ending concurrently with the then-current term for Tyler System Management Services under the Agreement.
- s) Upon the date when Contractor provides the County with access to the **Tyler 311/Incident Management** software ("Software Access Date") County shall pay annual maintenance and support fees of FIVE THOUSAND FOUR HUNDRED AND FORTY-FIVE DOLLARS (\$5,445), prorated for the time period commencing on the Software Access Date and ending concurrently with the then-current term for maintenance and support under the Agreement, for a total not to exceed amount of TEN THOUSAND EIGHT HUNDRED NINETY DOLLARS (\$10,890) through June 14, 2023.
- t) Upon the first day of the first month following the date Contractor makes the SaaS environment available to the County, County shall pay annual SaaS fees of FORTY-

FIVE THOUSAND DOLLARS (\$45,000) for both products **Tyler Notify and MyCivic Bundle**, prorated for the time period commencing on such date , for a total not-to-exceed amount of NINETY THOUSAND DOLLARS (\$90,000) through June 14, 2023.

XII. Delete **SECTION F GENERAL TERMS AND CONDITIONS, Paragraph 30. CONTRACT DOCUMENTS** in its entirety and replace it with the following:

30. CONTRACT DOCUMENTS. This Agreement includes the following attachments and schedules:

Exhibit A	Product and Rate Schedule
Exhibit B	Service Level Agreement
Exhibit C	Maintenance and Support Agreement
	Schedule 1: Support Call Process
Exhibit D	DocOrigin and BMI End User License Agreement and Technical Documentation
Exhibit E	Los Alamos Technology Standards
Exhibit F	SOW Tasks, Phases, and Timeline Chart
Exhibit G	Statement of Work
Exhibit H	Functional Requirements Matrix
Exhibit I	In Scope Program Modifications
Exhibit J	Confidential Information Disclosure Statement
Exhibit K	Contractor's Business Travel Policy
Exhibit L	Invoicing and Payment Schedule
Exhibit M	Product and Rate Sheet for Tyler Notify and MyCivicBundle (including Tyler 311/Incident Management)
Exhibit N	Statement of Work for Implementation of Tyler Notify and MyCivicBundle
Exhibit O	Technical Specifications Tyler Notify and MyCivic Bundle (including Tyler 311/Incident Management)

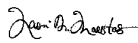
XIII. The reference to "Tyler Software" in Exhibit "B" is hereby deleted and replaced with "Hosted Software".

Except as expressly indicated in this Amendment, the terms and conditions of the Agreement shall remain in full force and effect.

IN WITNESS THEREOF, the parties hereto have executed this Amendment No. 1 as of the date(s) set forth opposite the signatures of their authorized representatives to be effective for all purposes on the date first written above.

ATTEST

INCORPORATED COUNTY OF LOS ALAMOS



NAOMI D. MAESTAS
COUNTY CLERK



BY:  9/29/2021

STEVEN LYNNE **DATE**
COUNTY MANAGER

Approved as to form:



J. ALVIN LEAPHART
COUNTY ATTORNEY

TYLER TECHNOLOGIES, INC., A DELAWARE CORPORATION

BY:  9/30/2021

SHERRY CLARK **DATE**
SR. CORPORATE ATTORNEY

Exhibit "M"
Rate Sheet for Tyler Notify and MyCivic Bundle (including Tyler 311/Incident Management)
AGR16-701-A1

a. License

Description	Quantity	One-time License Fee
Tyler 311/Incident Management	1	\$22,275.00
Sub-Total		\$22,275.00

b. Tyler Software Maintenance and Support Services

Description	Annual Maintenance Fee
Tyler 311/Incident Management	\$5,445.00
Tyler System Management Services Contract	\$1,361.00
Sub-Total	\$6,806.00

c. Implementation

SaaS	Implementation Hours	One-time Implementation Cost
Tyler Notify (Includes 150,000 Messages per Year)	16	\$2,800.00
MyCivic Bundle	96	\$16,800.00
Software and Related Services	Implementation Hours	One-time Implementation Cost
Tyler 311/Incident Management	80	\$14,000.00
Sub-Total		\$33,600.00

d. SaaS

Description	Quantity	Annual SaaS Fee
Tyler Notify (Includes 150,000 Messages per Year)	1	\$30,000.00
MyCivic Bundle	1	\$20,000.00
Less Discount		\$(5,000.00)
Sub-Total		\$45,000.00

e. Other Services

Description	Quantity	Unit Price	Extended Price
Project Management Hours	24	\$ 175.00	\$ 4,200.00
Sub-Total			\$ 4,200.00

Year 1 Total Not to Exceed Amount

\$111,881.00

Amendment No. AGR16-701-A1
Tyler Technologies, Inc
10

Statement of Work for Tyler Notify and MyCivic Portal Integration with the County

AGR16-701-A1



Los Alamos County, NM

SOW from Tyler Technologies, Inc.

4/16/2021

Presented to:
Pippa Freyer
1000 Central Avenue Suite 350
Los Alamos, NM 87544

Contact:
Jeff Keller
Email: Jeff.Keller@TylerTech.com
One Tyler Drive, Yarmouth, ME 04096

Table of Contents

PART 1: EXECUTIVE SUMMARY	1
1. Project Overview	1
1.1 Introduction	1
1.2 Project Goals	1
1.3 Methodology.....	1
PART 2: PROJECT FOUNDATION	3
2. Project Governance	3
3. Project Scope Control	4
3.1 Managing Scope and Project Change	4
3.2 Change Control	4
3.3 Change Request Management.....	4
4. Acceptance Process	6
5. Roles and Responsibilities	6
5.1 Tyler Roles & Responsibilities	6
5.1.1 Tyler Executive Sponsor	7
5.1.2 Tyler Implementation Manager	7
5.1.3 Tyler Project Manager.....	7
5.1.4 Tyler Implementation Consultant	8
5.1.5 Tyler Sales	8
5.1.6 Tyler Technical Services	8
5.1.7 Tyler Systems Management Services.....	9
5.2 Los Alamos Roles & Responsibilities	9
5.2.1 Los Alamos Executive Sponsor	9
5.2.2 Los Alamos Steering Committee	9
5.2.3 Los Alamos Project Manager	10
5.2.4 Los Alamos Functional Leads	11
5.2.5 Los Alamos Power Users	12
5.2.6 Los Alamos End Users	12
5.2.7 Los Alamos Technical Lead.....	12
5.2.8 Los Alamos Change Management Lead	13
PART 3: PROJECT PLAN	14
6. Project Stages.....	14
6.1 Initiate and Plan	15
6.1.1 Initial Coordination	15
6.1.2 Project/Phase Planning	16

6.1.3	Infrastructure Planning	17
6.1.4	Stakeholder Meeting.....	18
6.1.5	Intentionally left blank.	19
6.1.6	Control Point 1: Initiate & Plan Stage Acceptance.....	19
6.2	Assess & Define.....	20
6.2.1	Solution Orientation.....	20
6.2.2	Current & Future State Analysis.....	20
6.2.3	Intentionally left blank.	22
6.2.4	Intentionally left blank.	22
6.2.5	Intentionally left blank.	22
6.2.6	Control Point 2: Assess & Define Stage Acceptance	22
6.3	Prepare Solution	22
6.3.1	Initial System Deployment	22
6.3.2	Configuration	23
6.3.3	Process Refinement	25
6.3.4	Intentionally left blank.	26
6.3.5	Intentionally left blank.	26
6.3.6	Intentionally left blank.	26
6.3.7	Control Point 3: Prepare Solution Stage Acceptance.....	26
6.4	Production Readiness	26
6.4.1	Solution Validation.....	26
6.4.2	Go-Live Readiness	27
6.4.3	End User Training.....	28
6.4.4	Control Point 4: Production Readiness Stage Acceptance.....	30
6.5	Production.....	30
6.5.1	Go-Live	30
6.5.2	Transition to Client Services.....	32
6.5.3	Post Go-Live Activities.....	32
6.5.4	Control Point 5: Production Stage Acceptance	33
6.6	Close.....	34
6.6.1	Phase Closeout.....	34
6.6.2	Project Closeout	35
6.6.3	Control Point 6: Close Stage Acceptance	36
7.	General Assumptions	36
7.1	Project	36
7.2	Organizational Change Management	37
7.3	Resources and Scheduling.....	37
7.4	Intentionally left blank.	37
7.5	Facilities.....	37
8.	Glossary	38
	PART 4: APPENDICES	41
9.	No Conversion - Intentionally left blank.....	41

10.

Additional Appendices.....

42

11.

Project Timeline

42

11.1

MyCivic Timeline

42

Part 1: Executive Summary

1. Project Overview

1.1 Introduction

Tyler Technologies (“Tyler”) is the largest and most established provider of integrated software and technology services focused solely on the public sector. Tyler’s end-to-end solutions empower public sector entities including local, state, provincial and federal government, to operate more efficiently and connect more transparently with their constituents and with each other. By connecting data and processes across disparate systems, Tyler’s solutions transform how clients gain actionable insights that solve problems in their communities.

1.2 Project Goals

This Statement of Work (“SOW”) documents the methodology, implementation stages, activities, and roles and responsibilities, and project scope listed in the Investment Summary of the Agreement between Tyler and Client (collectively the “Project”).

The overall goals of the project are to:

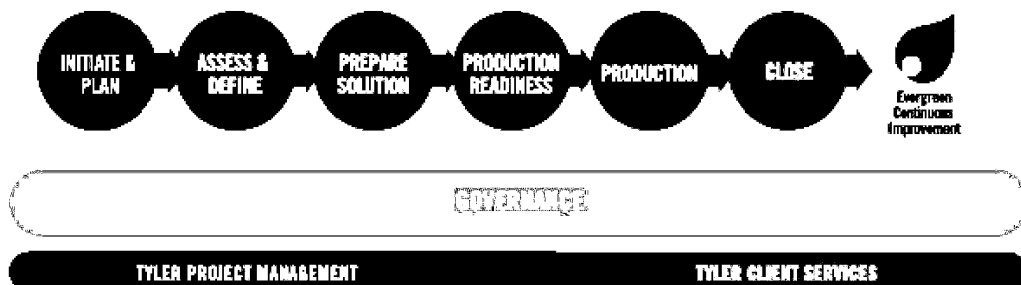
- Successfully implement the contracted scope on time and on budget
- Increase operational efficiencies and empower users to be more productive
- Streamlining business processes through automation, integration, and workflows
- Provide a user-friendly user interface to promote system use and productivity

1.3 Methodology

This is accomplished by Los Alamos and Tyler working as a partnership and Tyler utilizing its depth of implementation experience. While each Project is unique, all will follow Tyler’s six-stage methodology. Each of the six stages is comprised of multiple work packages, and each work package includes a narrative description, objectives, tasks, inputs, outputs/deliverables, assumptions, and a responsibility matrix.

Tailored specifically for Tyler’s public sector clients, the project methodology contains Stage Acceptance Control Points throughout each Phase to ensure adherence to scope, budget, timeline controls, effective communications, and quality standards. Clearly defined, the project methodology repeats consistently across Phases, and is scaled to meet the Client’s complexity and organizational needs.

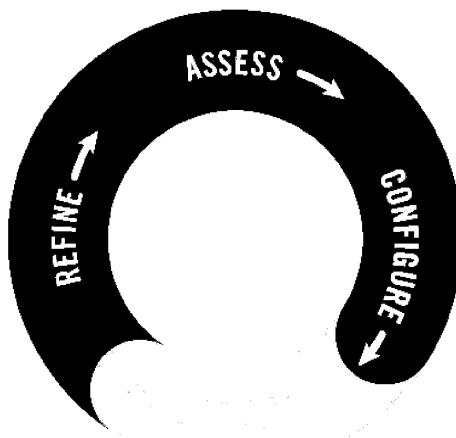
Tyler's Six Stage Project Methodology



The methodology adapts to both single-phase and multiple-phase projects.

To achieve Project success, it is imperative that both Los Alamos and Tyler commit to including the necessary leadership and governance. During each stage of the Project, it is expected that Los Alamos and Tyler Project teams work collaboratively to complete tasks. An underlying principle of Tyler's Implementation process is to employ an iterative model where Los Alamos's business processes are assessed, configured, validated, and refined cyclically in line with the project budget. This approach is used in multiple stages and work packages as illustrated in the graphic below.

Iterative Project Model



The delivery approach is systematic, which reduces variability and mitigates risks to ensure Project success. As illustrated, some stages, along with work packages and tasks, are intended to be overlapping by nature to efficiently and effectively complete the Project.

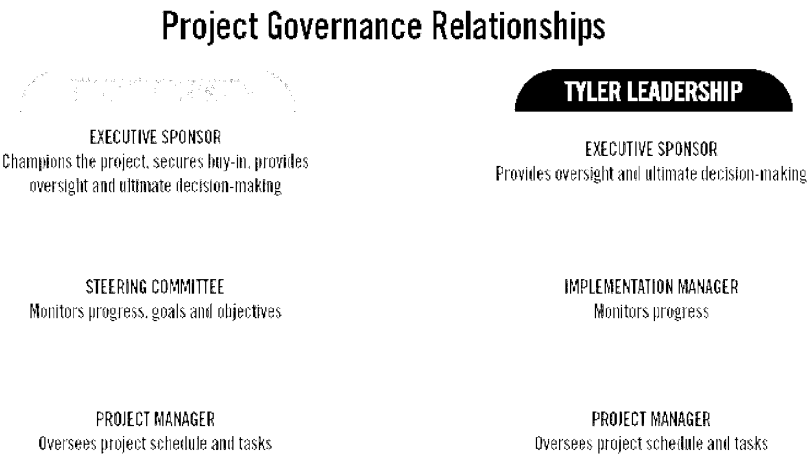
Part 2: Project Foundation

2. Project Governance

Project governance is the management framework within which Project decisions are made. The role of Project governance is to provide a decision-making approach that is logical, robust, and repeatable. This allows organizations to have a structured approach for conducting its daily business in addition to project related activities.

This section outlines the resources required to adequately meet the business needs, objectives, and priorities for the Project, communicate the goals to other Project participants, and provide support and guidance to accomplish these goals. Project governance defines the structure for escalation of issues and risks, Change Control review and authority, and Organizational Change Management activities. Throughout the Statement of Work Tyler has provided RACI Matrices for activities to be completed throughout the implementation which will further outline responsibilities of different roles in each stage. Further refinement of the governance structure, related processes, and specific roles and responsibilities occurs during the Initiate & Plan Stage.

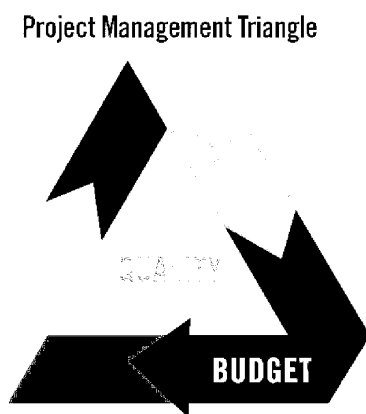
The chart below illustrates an overall team perspective where Tyler and Los Alamos collaborate to resolve Project challenges according to defined escalation paths. In the event that project managers do not possess authority to determine a solution, resolve an issue, or mitigate a risk, Tyler implementation management and Los Alamos Steering Committee become the escalation points to triage responses prior to escalation to Los Alamos and Tyler executive sponsors. As part of the escalation process, each Project governance tier presents recommendations and supporting information to facilitate knowledge transfer and issue resolution. Los Alamos and Tyler executive sponsors serve as the final escalation point.



3. Project Scope Control

3.1 Managing Scope and Project Change

Project Management governance principles contend that there are three connected constraints on a Project: budget, timeline, and scope. These constraints, known as the 'triple constraints' or Project management triangle, define budget in terms of financial cost, labor costs, and other resource costs. Scope is defined as the work performed to deliver a product, service or result with the specified features and functions, while time is simply defined as the schedule. The Triple Constraint theory states that if you change one side of the triangle, the other two sides must be correspondingly adjusted. For example, if the scope of the Project is increased, cost and time to complete will also need to increase. The Project and executive teams will need to remain cognizant of these constraints when making impactful decisions to the Project. A simple illustration of this triangle is included here, showing the connection of each item and their relational impact to the overall Scope.



A pillar of any successful project is the ability to properly manage scope while allowing the appropriate level of flexibility to incorporate approved changes. Scope and changes within the project will be managed using the change control process outlined in the following section.

3.2 Change Control

It may become necessary to change the scope of this Project due to unforeseeable circumstances (e.g., new constraints or opportunities are discovered). This Project is being undertaken with the understanding that Project scope, schedule, and/or cost may need to change in order to produce optimal results for stakeholders. Changes to contractual requirements will follow the change control process specified in the final contract, and as described below.

3.3 Change Request Management

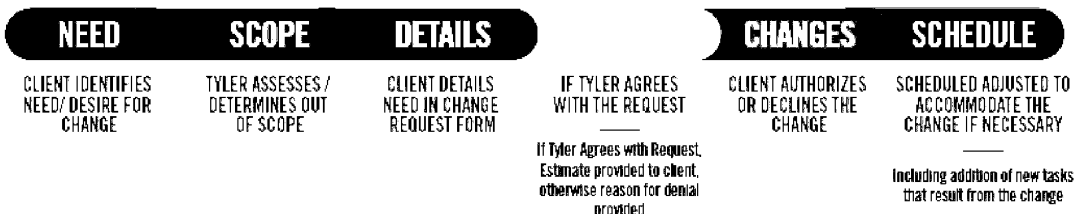
Should the need for a change to Project scope, schedule, and/or cost be identified during the Project, the change will be brought to the attention of the Steering Committee and an assessment of the change will occur. While such changes may result in additional costs and possible delays relative to the schedule, some

changes may result in less cost to Los Alamos; for example, Los Alamos may decide it no longer needs a deliverable originally defined in the Project. The Change Request will include the following information:

- The nature of the change.
- A good faith estimate of the additional cost or associated savings to Los Alamos, if any.
- The timetable for implementing the change.
- The effect on and/or risk to the schedule, resource needs or resource responsibilities.

Los Alamos will use its good faith efforts to either approve or disapprove any Change Request within ten (10) Business Days (or other period as mutually agreeable between Tyler and Los Alamos). Any changes to the Project scope, budget, or timeline must be documented and approved in writing using a Change Request form. These changes constitute a formal amendment to the Statement of Work and will supersede any conflicting term in the Statement of Work.

Change Request Process



4. Acceptance Process

The implementation of a Project involves many decisions to be made throughout its lifecycle. Decisions will vary from higher level strategy decisions to smaller, detailed Project level decisions. It is critical to the success of the Project that each Los Alamos office or department designates specific individuals for making decisions on behalf of their offices or departments.

Both Tyler and the Los Alamos will identify representative project managers. These individuals will represent the interests of all stakeholders and serve as the primary contacts between the two organizations.

The coordination of gaining client feedback and approval on Project deliverables will be critical to the success of the Project. The Los Alamos project manager will strive to gain deliverable and decision approvals from all authorized Los Alamos representatives. Given that the designated decision-maker for each department may not always be available, there must be a designated proxy for each decision point in the Project. Assignment of each proxy will be the responsibility of the leadership from each Los Alamos department. The proxies will be named individuals that have the authorization to make decisions on behalf of their department.

The following process will be used for accepting Deliverables and Control Points:

- The Los Alamos shall have five (5) business days from the date of delivery, or as otherwise mutually agreed upon by the parties in writing, to accept each Deliverable or Control Point. If the Los Alamos does not provide acceptance or acknowledgement within five (5) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deems the Deliverable or Control Point as accepted.
- If the Los Alamos does not agree the particular Deliverable or Control Point meets requirements, the Los Alamos shall notify Tyler project manager(s), in writing, with reasoning within five (5) business days, or the otherwise agreed-upon timeframe, not to be unreasonably withheld, of receipt of the Deliverable.
- Tyler shall address any deficiencies and redeliver the Deliverable or Control Point. The Los Alamos shall then have two (2) business days from receipt of the redelivered Deliverable or Control Point to accept or again submit written notification of reasons for rejecting the milestone. If the Los Alamos does not provide acceptance within two (2) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deems the Deliverable or Control Point as accepted.

5. Roles and Responsibilities

The following defines the roles and responsibilities of each Project resource for Los Alamos and Tyler. Roles and responsibilities may not follow the organizational chart or position descriptions at Los Alamos, but are roles defined within the Project. It is common for individual resources on both the Tyler and client project teams to fill multiple roles. Similarly, it is common for some roles to be filled by multiple people.

5.1 Tyler Roles & Responsibilities

Tyler assigns a project manager prior to the start of each Phase of the Project (some Projects may only be one Phase in duration). Additional Tyler resources are assigned as the schedule develops and as needs arise.

5.1.1 Tyler Executive Sponsor

Tyler executive management has indirect involvement with the Project and is part of the Tyler escalation process. This team member offers additional support to the Project team and collaborates with other Tyler department managers as needed in order to escalate and facilitate implementation Project tasks and decisions.

- Provides clear direction for Tyler staff on executing on the Project Deliverables to align with satisfying Los Alamos 's overall organizational strategy.
- Authorizes required Project resources.
- Resolves all decisions and/or issues not resolved at the implementation management level as part of the escalation process.
- Acts as the counterpart to Los Alamos 's executive sponsor.

5.1.2 Tyler Implementation Manager

- Tyler implementation management has indirect involvement with the Project and is part of the Tyler escalation process. The Tyler project managers consult implementation management on issues and outstanding decisions critical to the Project. Implementation management works toward a solution with the Tyler Project Manager or with Los Alamos management as appropriate. Tyler executive management is the escalation point for any issues not resolved at this level.
- Assigns Tyler Project personnel.
- Provides support for the Project team.
- Provides management support for the Project to ensure it is staffed appropriately and staff have necessary resources.
- Monitors Project progress including progress towards agreed upon goals and objectives.

5.1.3 Tyler Project Manager

- The Tyler project manager(s) provides oversight of the Project, coordination of Tyler resources between departments, management of the Project budget and schedule, effective risk and issue management, and is the primary point of contact for all Project related items. As requested by the client, the Tyler Project Manager provides regular updates to the client Steering Committee and other Tyler governance members. Tyler Project Manager's role includes responsibilities in the following areas:

5.1.3.1 Contract Management

- Validates contract compliance throughout the Project.
- Ensures Deliverables meet contract requirements.
- Acts as primary point of contact for all contract and invoicing questions.
- Prepares and presents contract milestone sign-offs for acceptance by Los Alamos project manager(s).
- Coordinates Change Requests, if needed, to ensure proper Scope and budgetary compliance.

5.1.3.2 Planning

- Delivers project planning documents.
- Defines Project tasks and resource requirements.
- Develops initial Project schedule and Project Management Plan.

- Collaborates with Los Alamos project manager(s) to plan and schedule Project timelines to achieve on-time implementation.

5.1.3.3 Implementation Management

- Tightly manages Scope and budget of Project to ensure Scope changes and budget planned versus actual are transparent and handled effectively and efficiently.
- Establishes and manages a schedule and Tyler resources that properly support the Project Schedule and are also in balance with Scope/budget.
- Establishes risk/issue tracking/reporting process between Los Alamos and Tyler and takes all necessary steps to proactively mitigate these items or communicate with transparency to Los Alamos any items that may impact the outcomes of the Project.
- Collaborates with Los Alamos 's project manager(s) to establish key business drivers and success indicators that will help to govern Project activities and key decisions to ensure a quality outcome of the project.
- Collaborates with Los Alamos 's project manager(s) to set a routine communication plan that will aide all Project team members, of both Los Alamos and Tyler, in understanding the goals, objectives, current status, and health of the Project.

5.1.3.4 Resource Management

- Acts as liaison between Project team and Tyler manager(s).
- Identifies and coordinates all Tyler resources across all applications, Phases, and activities including development, forms, installation, reports, implementation, and billing.
- Provides direction and support to Project team.
- Manages the appropriate assignment and timely completion of tasks as defined in the Project Schedule, task list, and Go-Live Checklist.
- Assesses team performance and adjusts as necessary.
- Consulted on in Scope 3rd party providers to align activities with ongoing Project tasks.

5.1.4 Tyler Implementation Consultant

- Completes tasks as assigned by the Tyler project manager(s).
- Documents activities for services performed by Tyler.
- Guides Los Alamos through software validation process following configuration.
- Assists during Go-Live process and provides support until Los Alamos transitions to Client Services.
- Facilitates training sessions and discussions with Los Alamos and Tyler staff to ensure adequate discussion of the appropriate agenda topics during the allotted time.

5.1.5 Tyler Sales

- Supports Sales to Implementation knowledge transfer during Initiate & Plan.
- Provides historical information, as needed, throughout implementation.
- Participates in pricing activities if additional licensing and/or services are needed.

5.1.6 Tyler Technical Services

- Maintains Tyler infrastructure requirements and design document(s).
- Involved in system infrastructure planning/review(s).

- Provides first installation of licensed software with initial database on servers.
- Supports and assists the project team with technical/environmental issues/needs.
- Deploys Tyler products.

5.1.7 Tyler Systems Management Services

- Manages incoming Los Alamos issues via phone, email, online customer incident portal, and from Client Services.
- Provides system support including remote support for Los Alamos systems, operating systems, peripheral hardware, and SQL assistance for the systems and platform directly attributable to the Tyler applications.
- Tracks issues for timely and effective resolution.
- Determines root cause and provides solutions or direction/escalation to Tyler Development.
- Consults on pre-sales regarding system requirements.
- Troubleshoots server and workstation issues.
- Migrates Tyler applications and databases to new hardware.
- Maintains systems and provide database and server administration.
- Provides proactive monitoring of Tyler application and/or database server(s).
- Performs server transfers, database analysis, file system cleanup, and backup verification.
- Assists with database refreshes, LDAP synchronization, and loading releases.

5.2 Los Alamos Roles & Responsibilities

Los Alamos resources will be assigned prior to the start of each Phase of the Project. One person may be assigned to multiple Project roles.

5.2.1 Los Alamos Executive Sponsor

The Los Alamos executive sponsor provides support to the Project by providing strategic direction and communicating key issues about the Project and its overall importance to the organization. When called upon, the executive sponsor also acts as the final authority on all escalated Project issues. The executive sponsor engages in the Project, as needed, in order to provide necessary support, oversight, guidance, and escalation, but does not participate in day-to-day Project activities. The executive sponsor empowers the Los Alamos steering committee, project manager(s), and functional leads to make critical business decisions for Los Alamos.

- Champions the project at the executive level to secure buy-in.
- Authorizes required project resources.
- Actively participates in organizational change communications.

5.2.2 Los Alamos Steering Committee

The Los Alamos steering committee understands and supports the cultural change necessary for the Project and fosters an appreciation for the Project's value throughout the organization. The steering committee oversees the Los Alamos project manager and Project as a whole through participation in regular internal meetings. The Los Alamos steering committee remains updated on all Project progress, Project decisions, and achievement of Project milestones. The Los Alamos steering committee also serves as primary level of issue resolution for the Project.

- Works to resolve all decisions and/or issues not resolved at the project manager level as part of the escalation process.
- Attends all scheduled steering committee meetings.
- Provides support for the project team.
- Assists with communicating key project messages throughout the organization.
- Prioritizes the project within the organization.
- Ensures the project staffed appropriately and that staff have necessary resources.
- Monitors project progress including progress towards agreed upon goals and objectives.
- Has the authority to approve or deny changes impacting the following areas:
 - Cost
 - Scope
 - Schedule
 - Project Goals
 - Los Alamos Policies
 - Needs of other client projects

5.2.3 Los Alamos Project Manager

Los Alamos shall assign project manager(s) prior to the start of this project with overall responsibility and authority to make decisions related to Project Scope, scheduling, and task assignment. Los Alamos Project Manager should communicate decisions and commitments to the Tyler project manager(s) in a timely and efficient manner. When Los Alamos project manager(s) do not have the knowledge or authority to make decisions, he or she engages the necessary resources to participate in discussions and make decisions in a timely fashion to avoid Project delays. The client project manager(s) are responsible for reporting to client steering committee and determining appropriate escalation points.

5.2.3.1 Contract Management

- Validates contract compliance throughout the project.
- Ensures that invoicing and Deliverables meet contract requirements.
- Acts as primary point of contact for all contract and invoicing questions. Collaborates on and approves Change Requests, if needed, to ensure proper scope and budgetary compliance.

5.2.3.2 Planning

- Reviews and accepts project planning documents.
- Defines project tasks and resource requirements for Los Alamos project team.
- Collaborates in the development and approval of the project schedule.
- Collaborates with Tyler project manager(s) to plan and schedule project timelines to achieve on-time implementation.

5.2.3.3 Implementation Management

- Tightly manages project budget and scope.
- Collaborates with Tyler project manager(s) to establish a process and approval matrix to ensure that scope changes and budget (planned versus actual) are transparent and handled effectively and efficiently.
- Collaborates with Tyler project manager to establish and manage a schedule and resource plan that properly supports the project schedule as a whole and is also in balance with scope and budget.

- Collaborates with Tyler project manager(s) to establish risk and issue tracking and reporting process between Los Alamos and Tyler and takes all necessary steps to proactively mitigate these items or communicate with transparency to Tyler any items that may impact the outcomes of the project.
- Collaborates with Tyler project manager(s) to establish key business drivers and success indicators that will help to govern project activities and key decisions to ensure a quality outcome of the project.
- Routinely communicates with both Los Alamos staff and Tyler, aiding in the understanding of goals, objectives, current status, and health of the project by all team members.
- Manages the requirements gathering process and ensure timely and quality business requirements are being provided to Tyler.

5.2.3.4 Resource Management

- Acts as liaison between project team and stakeholders.
- Identifies and coordinates all Los Alamos resources across all modules, phases, and activities including data conversions, forms design, hardware and software installation, reports building, and satisfying invoices.
- Provides direction and support to project team.
- Builds partnerships among the various stakeholders, negotiating authority to move the project forward.
- Manages the appropriate assignment and timely completion of tasks as defined.
- Assesses team performance and takes corrective action, if needed.
- Provides guidance to Los Alamos technical teams to ensure appropriate response and collaboration with Tyler Technical Support Teams in order to ensure timely response and appropriate resolution.
- Owns the relationship with in-Scope 3rd party providers and aligns activities with ongoing project tasks.
- Ensures that users have appropriate access to Tyler project toolsets as required.
- Conducts training on proper use of toolsets.
- Validates completion of required assignments using toolsets.

5.2.4 Los Alamos Functional Leads

- Makes business process change decisions under time sensitive conditions.
- Communicates existing business processes and procedures to Tyler consultants.
- Assists in identifying business process changes that may require escalation.
- Contributes business process expertise for Current & Future State Analysis.
- Identifies and includes additional subject matter experts to participate in Current & Future State Analysis.
- Validates that necessary skills have been retained by end users.
- Provides End Users with dedicated time to complete required homework tasks.
- Acts as an ambassador/champion of change for the new process and provide business process change support.
- Identifies and communicates any additional training needs or scheduling conflicts to Los Alamos project manager.
- Actively participates in all aspects of the implementation, including, but not limited to, the following key activities:
 - Task completion
 - Stakeholder Meeting
 - Project Management Plan development

- Schedule development
- Maintenance and monitoring of risk register
- Escalation of issues
- Communication with Tyler project team
- Coordination of Los Alamos resources
- Attendance at scheduled sessions
- Change management activities
- Modification specification, demonstrations, testing and approval assistance
- Data analysis assistance
- Decentralized end user training
- Process testing
- Solution Validation

5.2.5 Los Alamos Power Users

- Participate in project activities as required by the project team and project manager(s).
- Provide subject matter expertise on Los Alamos business processes and requirements.
- Act as subject matter experts and attend Current & Future State Analysis sessions as needed.
- Attend all scheduled training sessions.
- Participate in all required post-training processes as needed throughout project.
- Test all application configuration to ensure it satisfies business process requirements.
- Become application experts.
- Participate in Solution Validation.
- Adopt and support changed procedures.
- Complete all deliverables by the due dates defined in the project schedule.
- Demonstrate competency with Tyler products processing prior to Go-live.
- Provide knowledge transfer to Los Alamos staff during and after implementation.

5.2.6 Los Alamos End Users

- Attend all scheduled training sessions.
- Become proficient in application functions related to job duties.
- Adopt and utilize changed procedures.
- Complete all deliverables by the due dates defined in the project schedule.
- Utilize software to perform job functions at and beyond Go-live.

5.2.7 Los Alamos Technical Lead

- Coordinates updates and releases with Tyler as needed.
- Coordinates the copying of source databases to training/testing databases as needed for training days.
- Coordinates and adds new users, printers and other peripherals as needed.
- Validates that all users understand log-on process and have necessary permission for all training sessions.
- Coordinates interface development for Los Alamos third party interfaces.
- Develops or assists in creating reports as needed.
- Ensures on-site system meets specifications provided by Tyler.
- Assists with software installation as needed.

- Client-hosted:
 - Involved in infrastructure planning/review
 - Purchases and sets up client-hosted servers

5.2.7.1 Los Alamos Upgrade Coordination

- Becomes familiar with the software upgrade process and required steps.
- Becomes familiar with Tyler's releases and updates.
- Utilizes Tyler resources to stay abreast of the latest Tyler releases and updates, as well as the latest helpful tools to manage Los Alamos's software upgrade process.
- Assists with the software upgrade process during implementation.
- Manages software upgrade activities post-implementation.
- Manages software upgrade plan activities.
- Coordinates software upgrade plan activities with Los Alamos and Tyler resources.
- Communicates changes affecting users and department stakeholders.
- Obtains department stakeholder acceptance to upgrade production environment.

5.2.8 Los Alamos Change Management Lead

- Validates that users receive timely and thorough communication regarding process changes.
- Provides coaching to supervisors to prepare them to support users through the project changes.
- Identifies the impact areas resulting from project activities and develops a plan to address them proactively.
- Identifies areas of resistance and develops a plan to reinforce the change.
- Monitors post-production performance and new process adherence.

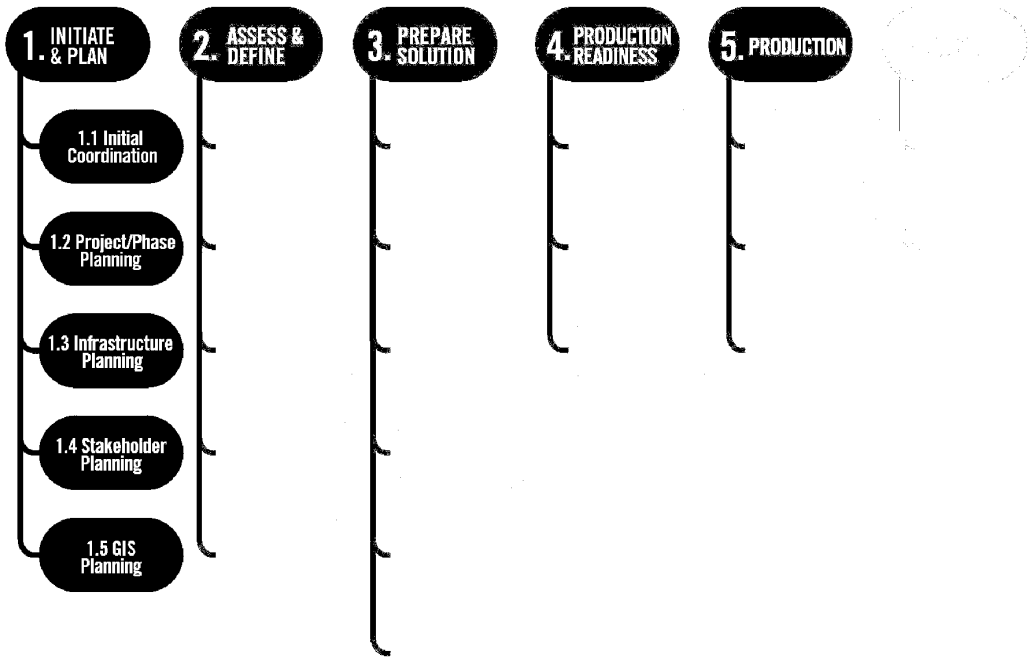
Part 3: Project Plan

6. Project Stages

Work Breakdown Structure

The Work Breakdown Structure (WBS) is a hierarchical representation of a Project or Phase broken down into smaller, more manageable components. The top-level components are called “Stages” and the second level components are called “Work Packages”. The work packages, shown below each stage, contain the high-level work to be done. The detailed Project Schedule, developed during Project/Phase Planning and finalized during subsequent stages, lists the tasks to be completed within each work package. Each stage ends with a “Control Point”, confirming the work performed during that stage of the Project has been accepted by Los Alamos.

Work Breakdown Structure (WBS)



**Items noted with an asterisk in the graphic above relate to specific products and services. If those products and services are not included in the scope of the contract, these specific work packages will be noted as “Intentionally Left Blank” in Section 6 of the Statement of Work.*

6.1 Initiate and Plan

The Initiate and Plan stage involves Project initiation, infrastructure, and planning. This stage creates a foundation for the Project by identifying and establishing sequence and timing for each Phase as well as verifying scope for the Project. This stage will be conducted at the onset of the Project, with a few unique items being repeated for the additional Phases as needed.

6.1.1 Initial Coordination

Prior to Project commencement, Tyler management assigns project manager(s). Additional Project resources will be assigned later in the Project as a Project schedule is developed. Tyler provides Los Alamos with initial Project documents used to gather names of key personnel, their functional role as it pertains to the Project, as well as any blackout dates to consider for future planning. Los Alamos gathers the information requested by the provided deadline ensuring preliminary planning and scheduling can be conducted moving the Project forward in a timely fashion. Internally, the Tyler Project Manager(s) coordinate with sales to ensure transfer of vital information from the sales process prior to scheduling a Project Planning Meeting with Los Alamos's team. During this step, Tyler will work with Los Alamos to establish the date(s) for the Project and Phase Planning session.

Objectives:

- Formally launch the project.
- Establish project governance.
- Define and communicate governance for Tyler.
- Identify client project team.

STAGE 1	Initial Coordination																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Tyler project team is assigned	A	R	C	I	I	I	I		I		I						
Client project team is assigned									A	I	R	I	I	I			
Provide initial project documents to Los Alamos		A	R	C			C		I		I						
Gather preliminary information requested			I						A		R	C		C		C	C
Sales to implementation knowledge transfer		A	R	I	I	I	I				I						

Create Project Portal to store project artifacts and facilitate communication		A	R								I						
---	--	---	---	--	--	--	--	--	--	--	---	--	--	--	--	--	--

Inputs	Contract documents
	Statement of Work

Outputs/Deliverables	Completed initial project documents

Work package assumptions:

- Project activities begin after the agreement has been fully executed.

6.1.2 Project/Phase Planning

Project and Phase planning provides an opportunity to review the contract, software, data conversions and services purchased, identify applications to implement in each Phase (if applicable), and discuss implementation timeframes.

During this work package Tyler will work with Los Alamos to coordinate and plan a formal Project planning meeting(s). This meeting signifies the start of the Project and should be attended by all Los Alamos Project team members and the Tyler Project Manager. The meeting provides an opportunity for Tyler to introduce its implementation methodology, terminology, and Project management best practices to Los Alamos's Project Team. This will also present an opportunity for project managers and Project sponsors to begin to discuss Project communication, metrics, status reporting and tools to be used to measure Project progress and manage change.

Tyler will work with the Los Alamos Project Team to prepare and deliver the Project Management Plan as an output of the planning meeting. This plan will continue to evolve and grow as the Project progresses and will describe how the project will be executed, monitored, and controlled.

During project planning, Tyler will introduce the tools that will be used throughout the implementation. Tyler will familiarize the client with these tools during project planning and make them available for review and maintenance as applicable throughout the project. Some examples are Solution validation plan, issue log, and go-live checklist.

STAGE 1	Project/Phase Planning	
	Tyler	Client

RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Schedule and conduct planning session(s)		A	R						I		C	C	I				
Develop Project Management Plan		A	R						I		C	C	I				
Develop initial project schedule		A	R	I	I	I	I		I	I	C	C	I	I	C		I

Inputs	Contract documents
	Statement of Work

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Project Management Plan	Delivery of document
	Initial Project Schedule	Los Alamos provides acceptance of schedule based on resource availability, project budget, and goals.

6.1.3 Infrastructure Planning

Procuring required hardware and setting it up properly is a critical part of a successful implementation. This task is especially important for Tyler-hosted/SaaS deployment models. Tyler will be responsible for building the environments for a hosted/SaaS deployment, unless otherwise identified in the Agreement. Tyler will install Licensed Software on application server(s) or train Los Alamos to install License Software. The Los Alamos is responsible for the installation and setup of all peripheral devices.

Objectives:

- Ensure Los Alamos's infrastructure meets Tyler's application requirements.
- Ensure Los Alamos's infrastructure is scheduled to be in place and available for use on time.

STAGE 1	Infrastructure Planning	
	Tyler	Client

RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts	Department Heads	End Users	Technical Leads
Provide Infrastructure Requirements and Design Document		A	R		C		C				I						I
Initial Infrastructure Meeting		A	R		C		C				C						C
*Schedule SaaS Environment Availability		A	R				C				I						
*Schedule Hardware to be Available for Installation			I				I		A		R						C
Schedule Installation of All Licensed Software		A	R				C				I						I
Infrastructure Audit		A	R				C				I						C

Inputs	1. Initial Infrastructure Requirements and Design Document
--------	--

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	1. Completed Infrastructure Requirements and Design Document	Delivery of Document
	2. Infrastructure Audit	System Passes Audit Criteria

Work package assumptions:

- Los Alamos will maintain environment (or virtual environment) for On-Premise deployments.

6.1.4 Stakeholder Meeting

Communication of the Project planning outcomes to the Los Alamos Project team, executives and other key stakeholders is vital to Project success. The Stakeholder meeting is a strategic activity to inform, engage, gain commitment, and instill confidence in the Los Alamos team. During the meeting, the goals and objectives of the Project will be reviewed along with detail on Project scope, implementation methodology, roles and responsibilities, Project timeline and schedule, and keys to Project success.

Objectives:

- Formally present and communicate the project activities and timeline.
- Communicate project expectations.

STAGE 1	Stakeholder Meeting
---------	---------------------

	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Create Stakeholder Meeting Presentation	I	A	R	I	I				I	I	C		I				
Review Stakeholder Meeting Presentation		I	C						A		R		C				
Perform Stakeholder Meeting Presentation	I	A	R	I	I				I	I	C	I	I	I	I	I	I

Inputs	Agreement
	SOW
	Project Management Plan

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Stakeholder Meeting Presentation	

Work package assumptions:

- None

6.1.5 Intentionally left blank.

6.1.6 Control Point 1: Initiate & Plan Stage Acceptance

Acceptance criteria for this stage includes completion of all criteria listed below.

Note: Advancement to the Assess & Define stage is not dependent upon Tyler's receipt of this stage acceptance.

Initiate & Plan Stage Deliverables:

- Project Management Plan
- Initial Project Schedule

Initiate & Plan stage acceptance criteria:

- All stage deliverables accepted based on acceptance criteria previously defined
- Project governance defined
- Project portal made available to Los Alamos

- Stakeholder meeting complete

6.2 Assess & Define

The Assess & Define stage will provide an opportunity to gather information related to current Los Alamos business processes. This information will be used to identify and define business processes utilized with Tyler software. Los Alamos collaborates with Tyler providing complete and accurate information to Tyler staff and assisting in analysis, understanding current workflows and business processes.

6.2.1 Solution Orientation

The Solution Orientation provides the Project stakeholders a high-level understanding of the solution functionality prior to beginning the current and future state analysis. The primary goal is to establish a foundation for upcoming conversations regarding the design and configuration of the solution.

Tyler utilizes a variety of tools for the Solution Orientation, focusing on Los Alamos team knowledge transfer such as: eLearning, documentation, or walkthroughs. The Los Alamos team will gain a better understanding of the major processes and focus on data flow, the connection between configuration options and outcome, integration, and terminology that may be unique to Tyler's solution.

Objectives:

- Provide a basic understanding of system functionality.
- Prepare Los Alamos for current and future state analysis.

STAGE 2	Solution Orientation																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
			A	R							I	I		I	I		I
											A	R		C			C
			A	R							I	I		I	I		I

Inputs	Solution orientation materials
	Training Plan

6.2.2 Current & Future State Analysis

The Current & Future State Analysis provides the Project stakeholders and Tyler an understanding of process changes that will be achieved with the new system.

Los Alamos and Tyler will evaluate current state processes, options within the new software, pros and cons of each based on current or desired state and make decisions about the future state configuration and processing. This may occur before or within the same timeframe as the configuration work package. The options within the new software will be limited to the scope of this implementation and will make use of standard Tyler functionality.

The Los Alamos will adopt the existing Tyler solution wherever possible to avoid project schedule and quality risk from over customization of Tyler products. It is the client's responsibility to verify that in-scope requirements are being met throughout the implementation if functional requirements are defined as part of the contract. The following guidelines will be followed when evaluating if a modification to the product is required:

- A reasonable business process change is available.
- Functionality exists which satisfies the requirement.
- Configuration of the application satisfies the requirement.
- An in-scope modification satisfies the requirement.

Requirements that are not met will follow the agreed upon change control process and can have impacts on the project schedule, scope, budget and resource availability.

STAGE 2	Current & Future State Analysis																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Current State process review			A	R	I	I	I				C	C	C	C			C
Discuss future-state options			A	R	C	C	C				C	C	C	C			C
Make future-state decisions (non-COTS)			C	C	C	C	C				A	R	I	C			C
Document anticipated configuration options required to support future state			A	R	C	C	C				I	I	I	I			I

Inputs	Client current state documentation
	Solution Orientation completion

Outputs / Deliverables	Acceptance Criteria [only] for Deliverables
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	Documentation that describes future-state decisions and configuration options to support future-state decisions.	Delivery of document
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Work package assumptions:

- Los Alamos attendees possess sufficient knowledge and authority to make future state decisions.
- Los Alamos is responsible for any documentation of current state business processes.
- Client is able to effectively communicate current state processes.

6.2.3 Intentionally left blank.

6.2.4 Intentionally left blank.

6.2.5 Intentionally left blank.

6.2.6 Control Point 2: Assess & Define Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below.

Note: Advancement to the Prepare Solution Stage is dependent upon Tyler's receipt of the Stage Acceptance.

Assess & Define Stage Deliverables:

- Documentation of future state decisions and configuration options to support future state decisions.
- Modification specification document.
- Assess & Define Stage Acceptance Criteria:
- All stage deliverables accepted based on criteria previously defined.
- Solution Orientation is delivered.

6.3 Prepare Solution

During the Prepare Solution stage, information gathered during the Initiate & Plan and Assess & Define stages will be used to install and configure the Tyler software solution. Software configuration will be validated by the client against future state decisions defined in previous stages and processes refined as needed to ensure business requirements are met.

6.3.1 Initial System Deployment

The timely availability of the Tyler Solution is important to a successful Project implementation. The success and timeliness of subsequent work packages are contingent upon the initial system deployment of Tyler Licensed Software on an approved network and infrastructure. Delays in executing this work package can affect the project schedule.

Objectives:

- All licensed software is installed and operational.
- Los Alamos is able to access the software.

STAGE 3	Initial System Deployment (Hosted/SaaS)*																
	Tyler							Client									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Prepare hosted environment			A				R				I						C
Install Licensed Software with Initial Database on Server(s) for Included Environments			A				R				I						C
Install Licensed Software on Client Devices (if applicable)			I				C				A						R
Tyler System Administration Training (if applicable)			A				R				I						C

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Licensed Software is Installed on the Server(s)	Software is accessible
	Licensed Software is Installed on Clients (if applicable)	Software is accessible
	Installation Checklist/System Document	System Passes
	Infrastructure Design Document (C&J – If Applicable)	

Work package assumptions:

- The most current generally available version of the Tyler Licensed Software will be installed.
- Los Alamos will provide network access for Tyler modules, printers, and Internet access to all applicable Los Alamos and Tyler Project staff.

6.3.2 Configuration

The purpose of Configuration is to prepare the software product for validation.

Tyler staff collaborates with Los Alamos to complete software configuration based on the outputs of the future state analysis performed during the Assess and Define Stage. Los Alamos collaborates with Tyler staff iteratively to validate software configuration.

Objectives:

- Software is ready for validation.
- Educate Los Alamos Power User how to configure and maintain software.
- Prepare standard interfaces for process validation (if applicable).

STAGE 3	Configuration																
	Tyler							Client									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Conduct configuration training			A	R							I	C		C			
Complete Tyler configuration tasks (where applicable)			A	R							I	I		I			
Complete Client configuration tasks (where applicable)			I	C							A	R		C			
Standard interfaces configuration and training (if applicable)			A	R			C				I	C		C			C
Updates to Solution Validation testing plan			C	C							A	R		C			C

Inputs	Documentation that describes future state decisions and configuration options to support future state decisions.
--------	--

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Configured System	N/A

Work package assumptions:

- Tyler provides guidance for configuration options available within the Tyler software. Los Alamos is responsible for making decisions when multiple options are available.

6.3.3 Process Refinement

Tyler will educate the Los Alamos users on how to execute processes in the system to prepare them for the validation of the software. Los Alamos collaborates with Tyler staff iteratively to validate software configuration options to support future state.

Objectives:

- Ensure that Los Alamos understands future state processes and how to execute the processes in the software.
- Refine each process to meet the business requirements.
- Validate standard interfaces, where applicable.
- Validate forms and reports, where applicable.

STAGE 3	Process Refinement																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Conduct process training			A	R							I	C	I	C			
Confirm process decisions			I	C						A	R	C	I	C			
Test configuration			I	C							A	R		C			
Refine configuration (Client Responsible)			I	C							A	R		C			
Refine configuration (Tyler Responsible)			A	R							I	I		I			
Validate interface process and results			I	C			C				A	R		C			C
Update client-specific process documentation (if applicable)			I	C							A	R		C			
Updates to Solution Validation testing plan			C	C							A	R		C			C

Inputs	Initial Configuration
--------	-----------------------

	Documentation that describes future state decisions and configuration options to support future state decisions.
	Solution validation test plan

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Updated solution validation test plan	
	Completed client-specific process documentation (completed by Los Alamos)	

Work package assumptions:

- None

6.3.4 Intentionally left blank.

6.3.5 Intentionally left blank.

6.3.6 Intentionally left blank.

6.3.7 Control Point 3: Prepare Solution Stage Acceptance

Acceptance criteria for this Stage includes all criteria listed below in each Work Package.

Note: Advancement to the Production Readiness Stage is dependent upon Tyler's receipt of the Stage Acceptance.

Prepare Solution Stage Deliverables:

- Licensed software is installed.
- Installation checklist/system document.

Prepare Solution Stage Acceptance Criteria:

- All stage deliverables accepted based on criteria previously defined.
- Software is configured.
- Solution validation test plan has been reviewed and updated if needed.

6.4 Production Readiness

Activities in the Production Readiness stage will prepare the client team for go-live through solution validation, the development of a detailed go-live plan and end user training. A readiness assessment will be conducted with the client to review the status of the project and the organizations readiness for go-live.

6.4.1 Solution Validation

Solution Validation is the end-to-end software testing activity to ensure that Los Alamos verifies all aspects of the Project (hardware, configuration, business processes, etc.) are functioning properly, and validates that all features and functions per the contract have been deployed for system use.

Objectives:

- Validate that the solution performs as indicated in the solution validation plan.
- Ensure Los Alamos organization is ready to move forward with go-live and training (if applicable).

STAGE 4	Solution Validation																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Update Solution Validation plan			A	R	C						C	C		C			
Update test scripts (as applicable)			C	C	C						A	R		C			
Perform testing			C	C	C						A	R		C			
Document issues from testing			C	C	C						A	R		C			
Perform required follow-up on issues			A	R	C						C	C		C			

Inputs	Solution Validation plan
	Completed work product from prior stages (configuration, business process, etc.)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Solution Validation Report	Los Alamos updates report with testing results

Work package assumptions:

- Designated testing environment has been established.
- Testing includes current phase activities or deliverables only.

6.4.2 Go-Live Readiness

Tyler and Los Alamos will ensure that all requirements defined in Project planning have been completed and the Go-Live event can occur, as planned. A go-live readiness assessment will be completed identifying risks or actions items to be addressed to ensure the client has considered its ability to successfully Go-Live. Issues and concerns will be discussed and mitigation options documented. Tyler and Los Alamos will jointly agree to move forward with transition to production. Expectations for final preparation and critical dates for the weeks leading into and during the Go-Live week will be planned in detail and communicated to Project teams.

Objectives:

- Action plan for go-live established.
- Assess go-live readiness.
- Stakeholders informed of go-live activities.

STAGE 4	Go-Live Readiness																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Perform Readiness Assessment	I	A	R	C	C	I	C	I	I	I	I		I				I
Conduct Go-Live planning session		A	R	C							C	C	C	C	C		C
Order peripheral hardware (if applicable)			I							A	R						C
Confirm procedures for Go-Live issue reporting & resolution		A	R	I	I	I	I				C	C	I	I	I	I	I
Develop Go-Live checklist		A	R	C	C						C	C	I	C			C
Final system infrastructure review (where applicable)			A				R				C						C

Inputs	Future state decisions
	Go-live checklist

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Updated go-live checklist	Updated Action plan and Checklist for go-live delivered to Los Alamos

Work package assumptions:

- None

6.4.3 End User Training

End User Training is a critical part of any successful software implementation. Using a training plan previously reviewed and approved, the Project team will organize and initiate the training activities.

Train the Trainer: Tyler provides one occurrence of each scheduled training or implementation topic. Los Alamos users who attended the Tyler sessions may train additional users. Additional Tyler led sessions may be contracted at the applicable rates for training.

Tyler will provide standard application documentation for the general use of the software. It is not Tyler's responsibility to develop client specific business process documentation. Client-led training labs using client specific business process documentation if created by the client can be added to the regular training curriculum, enhancing the training experiences of the end users.

Objectives:

- End users are trained on how to use the software prior to go-live.
- Los Alamos is prepared for on-going training and support of the application.

STAGE 4	End User Training																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
		A	R	C							C		I		C		
		A	R	C							C	C	I	C	C	C	
		A	R	C							C	C	I	C			
			C	C							A	R	I	C	C	C	

Inputs	Training Plan
	List of End Users and their Roles / Job Duties
	Configured Tyler System

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	End User Training	Los Alamos signoff that training was delivered

Work package assumptions:

- The Los Alamos project team will work with Tyler to jointly develop a training curriculum that identifies the size, makeup, and subject-area of each of the training classes.
- Tyler will work with Los Alamos as much as possible to provide end-user training in a manner that minimizes the impact to the daily operations of Los Alamos departments.

- Los Alamos will be responsible for training new users after go-live (exception—previously planned or regular training offerings by Tyler).

6.4.4 Control Point 4: Production Readiness Stage Acceptance

Acceptance criteria for this stage includes all criteria listed below. Advancement to the Production stage is dependent upon Tyler’s receipt of the stage acceptance.

Production Readiness stage deliverables:

- Solution Validation Report.
- Update go-live action plan and checklist.
- End user training.

Production Readiness stage acceptance criteria:

- All stage deliverables accepted based on criteria previously defined.
- Go-Live planning session conducted.

6.5 Production

Following end user training the production system will be fully enabled and made ready for daily operational use as of the scheduled date. Tyler and Los Alamos will follow the comprehensive action plan laid out during Go-Live Readiness to support go-live activities and minimize risk to the Project during go-live. Following go-live, Tyler will work with Los Alamos to verify that implementation work is concluded, post go-live activities are scheduled, and the transition to Client Services is complete for long-term operations and maintenance of the Tyler software.

6.5.1 Go-Live

Following the action plan for Go-Live, defined in the Production Readiness stage, Los Alamos and Tyler will complete work assigned to prepare for Go-Live.

Tyler staff collaborates with Los Alamos during Go-Live activities. Los Alamos transitions to Tyler software for day-to-day business processing.

Some training topics are better addressed following Go-Live when additional data is available in the system or based on timing of applicable business processes and will be scheduled following Go-Live per the Project Schedule.

Objectives:

- Execute day to day processing in Tyler software.
- Client data available in Production environment.

STAGE 5	Go-Live	
	Tyler	Client

RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Provide final source data extract, if applicable			C		C						A						R
Final source data pushed into production environment, if applicable			A	C	R						I	C		C			C
Proof final converted data, if applicable			C	C	C						A	R		C			
Complete Go-Live activities as defined in the Go-Live action plan			C	C	C					A	R	C	I	C			
Provide Go-Live assistance			A	R	C	C		I			C	C	I	C		I	C

Inputs	Comprehensive Action Plan for Go-Live
	Final source data (if applicable)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Data is available in production environment	Client confirms data is available in production environment

Work package assumptions:

- Los Alamos will complete activities documented in the action plan for Go-Live as scheduled.
- External stakeholders will be available to assist in supporting the interfaces associated with the Go-Live live process.
- The Client business processes required for Go-Live are fully documented and tested.
- The Los Alamos Project team and subject matter experts are the primary point of contact for the end users when reporting issues during Go-Live.
- The Los Alamos Project Team and Power User's provide business process context to the end users during Go-Live.
- The Tyler Go-Live support team is available to consult with the Los Alamos teams as necessary.
- The Tyler Go-Live support team provides standard functionality responses, which may not be tailored to the local business processes.

6.5.2 Transition to Client Services

This work package signals the conclusion of implementation activities for the Phase or Project with the exception of agreed-upon post Go-Live activities. The Tyler project manager(s) schedules a formal transition of Los Alamos onto the Tyler Client Services team, who provides Los Alamos with assistance following Go-Live, officially transitioning Los Alamos to operations and maintenance.

Objectives:

- Ensure no critical issues remain for the project teams to resolve.
- Confirm proper knowledge transfer to Los Alamos teams for key processes and subject areas.

STAGE 5	Transition to Client Services																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Transfer client to Client Services and review issue reporting and resolution processes	I	I	A	I	I			R	I	I	C	C		C			
Review long term maintenance and continuous improvement			A					R			C	C		C			

Inputs	Open item/issues List
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Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Client Services Support Document	

Work package assumptions:

- No material project issues remain without assignment and plan.

6.5.3 Post Go-Live Activities

Some implementation activities are provided post-production due to the timing of business processes, the requirement of actual production data to complete the activities, or the requirement of the system being used in a live production state.

Objectives:

- Schedule activities that are planned for after Go-Live.
- Ensure issues have been resolved or are planned for resolution before phase or project close.

STAGE 5	Post Go-Live Activities																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Schedule contracted activities that are planned for delivery after go-live		A	R	C	C	C	C	I			C	C	I	C			C
Determine resolution plan in preparation for phase or project close out		A	R	C	C	C		I			C	C	I	C			

Inputs	List of post Go-Live activities
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Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Updated issues log	

Work package assumptions:

- System is being used in a live production state.

6.5.4 Control Point 5: Production Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below:

- Advancement to the Close stage is not dependent upon Tyler's receipt of this Stage Acceptance.
- Converted data is available in production environment.

Production Stage Acceptance Criteria:

- All stage deliverables accepted based on criteria previously defined.
- Go-Live activities defined in the Go-Live action plan completed.
- Client services support document is provided.

6.6 Close

The Close stage signifies full implementation of all products purchased and encompassed in the Phase or Project. Los Alamos transitions to the next cycle of their relationship with Tyler (next Phase of implementation or long-term relationship with Tyler Client Services).

6.6.1 Phase Closeout

This work package represents Phase completion and signals the conclusion of implementation activities for the Phase. The Tyler Client Services team will assume ongoing support of Los Alamos for systems implemented in the Phase.

Objectives:

- Agreement from Tyler and Los Alamos teams that activities within this phase are complete.

STAGE 6	Phase Close Out																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Reconcile project budget and status of contract Deliverables	I	A	R						I	I	C						
Hold post phase review meeting		A	R	C	C	C	C				C	C	C	C			C
Release phase-dependent Tyler project resources	A	R	I								I						

Participants	Tyler	Client
	Project Leadership	Project Manager
	Project Manager	Project Sponsor(s)
	Implementation Consultants	Functional Leads, Power Users, Technical Leads
	Technical Consultants (Conversion, Deployment, Development)	
	Client Services	

Inputs	Contract
	Statement of Work
	Project artifacts

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Final action plan (for outstanding items)	
	Post Phase Review	

Work package assumptions:

- Tyler deliverables for the phase have been completed.

6.6.2 Project Closeout

Completion of this work package signifies final acceptance and formal closing of the Project.

At this time Los Alamos may choose to begin working with Client Services to look at continuous improvement Projects, building on the completed solution.

Objectives:

- Confirm no critical issues remain for the project teams to resolve.
- Determine proper knowledge transfer to Los Alamos teams for key processes and subject areas has occurred.
- Verify all deliverables included in the Agreement are delivered.

STAGE 6	Project Close Out																
	Tyler								Client								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Conduct post project review		A	R	C	C	C	C				C	C	C	C			C
Deliver post project report to Los Alamos and Tyler leadership	I	A	R						I	I	C						
Release Tyler project resources	A	R	I								I						

Inputs	Contract
	Statement of Work

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
------------------------	--	---

Work package assumptions:

- All project implementation activities have been completed and approved.
- No critical project issues remain that have not been documented and assigned.
- Final project budget has been reconciled and invoiced.
- All Tyler deliverables have been completed.

6.6.3 Control Point 6: Close Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below.

Close Stage Deliverables:

- Post Project Report.

Close Stage Acceptance Criteria:

- Completed report indicating all Project deliverables and milestones have been completed.

7. General Assumptions

Tyler and Los Alamos will use this SOW as a guide for managing the implementation of the Tyler Project as provided and described in the Agreement. There are a number of assumptions which, when acknowledged and adhered to, will support a successful implementation. Assumptions related to specific work packages are documented throughout the SOW. Included here are general assumptions which should be considered throughout the overall implementation process.

7.1 Project

- Project activities will begin after the Agreement has been fully executed.
- The Los Alamos Project Team will complete their necessary assignments in a mutually agreed upon timeframe in order to meet the scheduled go-live date, as outlined in the Project Schedule.
- Sessions will be scheduled and conducted at a mutually agreeable time.
- Additional services, software modules and modifications not described in the SOW or Agreement will be considered a change to this Project and will require a Change Request Form as previously referenced in the definition of the Change Control Process.
- Tyler will provide a written agenda and notice of any prerequisites to the Los Alamos project manager(s) ten (10) business days or as otherwise mutually agreed upon time frame prior to any scheduled on-site or remote sessions, as applicable.
- Tyler will provide guidance for configuration and processing options available within the Tyler software. If multiple options are presented by Tyler, Los Alamos is responsible for making decisions based on the options available.
- Implementation of new software may require changes to existing processes, both business and technical, requiring Los Alamos to make process changes.

- Los Alamos is responsible for defining, documenting and implementing their policies that result from any business process changes.

7.2 Organizational Change Management

Unless otherwise contracted by Tyler, Los Alamos is responsible for managing Organizational Change. Impacted Client resources will need consistent coaching and reassurance from their leadership team to embrace and accept the changes being imposed by the move to new software. An important part of change is ensuring that impacted client resources understand the value of the change, and why they are being asked to change.

7.3 Resources and Scheduling

- Los Alamos resources will participate in scheduled activities as assigned in the Project Schedule.
- The Los Alamos team will complete prerequisites prior to applicable scheduled activities. Failure to do so may affect the schedule.
- Tyler and Los Alamos will provide resources to support the efforts to complete the Project as scheduled and within the constraints of the Project budget.
- Abbreviated timelines and overlapped Phases require sufficient resources to complete all required work as scheduled.
- Changes to the Project Schedule, availability of resources or changes in Scope will be requested through a Change Request. Impacts to the triple constraints (scope, budget and schedule) will be assessed and documented as part of the change control process.
- Los Alamos will ensure assigned resources will follow the change control process and possess the required business knowledge to complete their assigned tasks successfully. Should there be a change in resources, the replacement resource should have a comparable level of availability, change control process buy-in, and knowledge.
- Los Alamos makes timely Project related decisions in order to achieve scheduled due dates on tasks and prepare for subsequent training sessions. Failure to do so may affect the schedule, as each analysis and implementation session is dependent on the decisions made in prior sessions.
- Los Alamos will respond to information requests in a comprehensive and timely manner, in accordance with the Project Schedule.
- Los Alamos will provide adequate meeting space or facilities, including appropriate system connectivity, to the project teams including Tyler team members.
- For on-site visits, Tyler will identify a travel schedule that balances the needs of the project and the employee.

7.4 Intentionally left blank.

7.5 Facilities

- Los Alamos will provide dedicated space for Tyler staff to work with Los Alamos resources for both on-site and remote sessions. If Phases overlap, Los Alamos will provide multiple training facilities to allow for independent sessions scheduling without conflict.
- Los Alamos will provide staff with a location to practice what they have learned without distraction.

8. Glossary

Word or Term	Definition
Acceptance	Confirming that the output or deliverable is suitable and conforms to the agreed upon criteria.
Accountable	The one who ultimately ensures a task or deliverable is completed; the one who ensures the prerequisites of the task are met and who delegates the work to those responsible. [Also see RACI]
Application	A computer program designed to perform a group of coordinated functions, tasks or activities for the benefit of the user.
Application Programming Interface (API)	A defined set of tools/methods to pass data to and received data from Tyler software products
Agreement	This executed legal contract that defines the products and services to be implemented or performed.
Business Process	The practices, policy, procedure, guidelines, or functionality that the client uses to complete a specific job function.
Business Requirements Document	A specification document used to describe Client requirements for contracted software modifications.
Change Request	A form used as part of the Change Control process whereby changes in the scope of work, timeline, resources, and/or budget are documented and agreed upon by participating parties.
Change Management	Guides how we prepare, equip and support individuals to successfully adopt change in order to drive organizational success & outcomes
Code Mapping [where applicable]	An activity that occurs during the data conversion process whereby users equate data (field level) values from the old system to the values available in the new system. These may be one to one or many to one. Example: Old System [Field = eye color] [values = BL, Blu, Blue] maps to New Tyler System [Field = Eye Color] [value = Blue].
Consulted	Those whose opinions are sought, typically subject matter experts, and with whom there is two-way communication. [Also see RACI]
Control Point	This activity occurs at the end of each stage and serves as a formal and intentional opportunity to review stage deliverables and required acceptance criteria for the stage have been met.
Data Mapping [where applicable]	The activity determining and documenting where data from the legacy system will be placed in the new system; this typically involves prior data analysis to understand how the data is currently used in the legacy system and how it will be used in the new system.
Deliverable	A verifiable document or service produced as part of the Project, as defined in the work packages.
Go-Live	The point in time when the Client is using the Tyler software to conduct daily operations in Production.
Informed	Those who are kept up-to-date on progress, often only on completion of the task or deliverable, and with whom there is just one-way communication. [Also see RACI]

Infrastructure	The composite hardware, network resources and services required for the existence, operation and management of the Tyler software.
Interface	A connection to and potential exchange of data with an external system or application. Interfaces may be one way, with data leaving the Tyler system to another system or data entering Tyler from another system, or they may be bi-directional with data both leaving and entering Tyler and another system.
Integration	A standard exchange or sharing of common data within the Tyler system or between Tyler applications
Legacy System	The software from which a client is converting.
Modification	Custom enhancement of Tyler's existing software to provide features or functions to meet individual client requirements documented within the scope of the Agreement.
On-site	Indicates the work location is at one or more of the client's physical office or work environments.
Organizational Change	The process of changing an organization's strategies, processes, procedures, technologies, and culture, as well as the effect of such changes on the organization.
Output	A product, result or service generated by a process.
Peripheral devices	An auxiliary device that connects to and works with the computer in some way. Some examples: scanner, digital camera, printer.
Phase	A portion of the Project in which specific set of related applications are typically implemented. Phases each have an independent start, Go-Live and closure dates but use the same Implementation Plans as other Phases of the Project. Phases may overlap or be sequential and may have different Tyler resources assigned.
Project	The delivery of the software and services per the agreement and the Statement of Work. A Project may be broken down into multiple Phases.
RACI	A matrix describing the level of participation by various roles in completing tasks or Deliverables for a Project or process. Individuals or groups are assigned one and only one of the following roles for a given task: Responsible (R), Accountable (A), Consulted (C), or Informed (I).
Remote	Indicates the work location is at one or more of Tyler's physical offices or work environments.
Responsible	Those who ensure a task is completed, either by themselves or delegating to another resource. [Also see RACI]
Scope	Products and services that are included in the Agreement.

Solution	The implementation of the contracted software product(s) resulting in the connected system allowing users to meet Project goals and gain anticipated efficiencies.
Stage	The top-level components of the WBS. Each Stage is repeated for individual Phases of the Project.
Standard	Software functionality that is included in the base software (off-the-shelf) package; is not customized or modified.
Statement of Work (SOW)	Document which will provide supporting detail to the Agreement defining Project-specific activities, services and Deliverables.
System	The collective group of software and hardware that is used by the organization to conduct business.
Test Scripts	The steps or sequence of steps that will be used to validate or confirm a piece of functionality, configuration, enhancement, or Use Case Scenario.
Training Plan	Document(s) that indicate how and when users of the system will be trained relevant to their role in the implementation or use of the system.
Validation (or to validate)	The process of testing and approving that a specific Deliverable, process, program or product is working as expected.
Work Breakdown Structure (WBS)	A hierarchical representation of a Project or Phase broken down into smaller, more manageable components.
Work Package	A group of related tasks within a project.

Part 4: Appendices

9. No Conversion - Intentionally left blank.

11. Project Timeline

11.1 MyCivic/Tyler 311 Estimated Timeline

Phase	Suite			1	2	3	4	5	6	7	8	9	10
1	MyCivic												
2	Tyler 311												
3	Tyler Notify												
Month Estimate			Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22

Exhibit "O"
Technical Specifications Tyler Notify and MyCivic Bundle (including Tyler
311/Incident Management)
AGR16-701-A1

Technical Specification	Technical Specification Description	Note
IT14	The system should provide access from outside of the firewall by public external users in accordance with LAC security standards.	
IT71	The system should provide active notifications based on specific events and conditions.	
IT100	The system should provide the capability to generate letters and notices to user - defined groups.	Cannot generate physical printed letters, however digital is supported.
IT134	The system should provide for user configurable electronic management, multi - level approval routing, and reporting of work generated by individuals such as requisitions (including capital asset requisitions & project requests), purchase orders, journal entries, etc	
IT137	The system should allow the flow of work to be defined based on any data element or combination of data elements from initiation of a work queue item through various in -process, review, and approval activities (for all system modules). The work queue will follow a logical progression	
IT148	Citizens Interactions	
IT149	Customer Portal	
IT150	Customer Interactions	
WO34	The system should have the ability for online work requests	
WO35	The system should provide the ability to customize the user work -order screen based on WO type	
CU34	The system should provide date sensitive, user - defined customer comment screen	
CU63	Inbound Telephone Calls	Telephone calls to administrative user(s) are supported, however 311 does not offer voice prompting (IVR) at this time.
CU64	Inbound Contact via email	emails to administrative user(s) are supported, however 311 does not support inbound email automation at this time.
CU65	Inbound Access via WEB	

		Links to social media for interaction/review by administrative user(s) are supported, however 311 does not support automation via social media requests at this time.
CU66	Inbound contact via social media	
CU67	Inbound contact via mobile application	
CU68	Outbound Letters auto -generated by system	
CU69	Outbound Letters manually generated by user	
CU70	Outbound email auto -generated by system	
CU71	Outbound email manually generated by user	
CU72	User Defined Contact types	
CU73	Contact Status	
CU74	Contact Create Date	
CU75	Contact Create Time	
CU76	Contact Create User	
CU77	Contact Description	
CU78	Contact Closed Date	
CU79	Contact Closed Time	
CU80	Contact Closed User	
CU81	User Defined Fields	
CU82	Confirmation number	