tyler technologies

ORIGINAL

CITY OF GAINESVILLE, FL

ENTERPRISE PERMITTING & LAND MANAGEMENT SOFTWARE

RFP NO. DODX-180049-GD

WEDNESDAY, JANUARY 31, 2018

GARTH MAGNESS
2160 SATELLITE BLVD., SUITE 300, DULUTH, GA 30097
888.355.1039 [x] 763104
GARTH.MAGNESS@TYLERTECH.COM

COPY

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RESTRICTIONS ON DISCLOSURE

This proposal from Tyler Technologies, Inc. ("Tyler") contains proprietary and confidential information, including trade secrets, belonging to Tyler or Tyler's partners. Tyler is submitting this proposal on the express condition that the following portions will not be duplicated, disclosed, or otherwise made available, except for internal evaluation purposes:

- Response to the Functional Requirements, or "Checklist"
- Line-item pricing (total proposed contract amount may be disclosed)
- Screen shots on pages 10,11,15,16 & 17
- Customized Statement of Work/Implementation Plan

Each of these sections has separately been labeled "Proprietary and Confidential – Subject to Restrictions on Disclosure."

To the extent disclosure of those portions is requested or ordered, Tyler requires written notice of the request or order. If disclosure is subject to Tyler's permission, Tyler will grant that permission in writing, in Tyler's sole discretion. If disclosure is subject to a court or other legal order, Tyler will take whatever action Tyler deems necessary to protect its proprietary and confidential information, and will assume all responsibility and liability associated with that action.

Tyler agrees that any portions not listed above and marked accordingly are to be made available for public disclosure, as required under applicable public records laws and procurement processes.

TRADEMARKS DISCLAIMER

Because of the nature of this proposal, third-party hardware and software products may be mentioned by name. These names may be trademarked by the companies that manufacture the products. It is not Tyler's intent to claim these names or trademarks as our own.

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technologies

Wednesday, January 31, 2018

City of Gainesville
Gayle Dykeman, Senior Buyer
200 East University Avenue Room 339
Gainesville, FL 32601

Dear Evaluation Committee:

On behalf of Tyler Technologies, Inc. I respectfully submit the enclosed proposal for your evaluation and consideration in response RFP No. DODX-180049-GD.

Our firm has carefully reviewed the goals, objectives and requirements delineated within the RFP and we are excited about the opportunity to work with the City of Gainesville on this project. Moreover, we are confident that Tyler brings the right mix of technology, experience, and resources to ensure an environment for success.

Tyler's EnerGov solution is the industry's leading "Citizen-Centric" solution for public-sector agencies looking to streamline and modernize their permitting, land use, enforcement and regulatory management processes. In fact, over the past 5 years, Tyler's EnerGov Permitting & Land Management platform has been selected by more government agencies than any other competing solution in the market including: Los Angeles County, CA, Riverside County, CA, Miami Beach, FL, Miami-Dade County, FL, Kansas City, MO, Savannah, GA, Columbia, SC, Charleston, SC and Raleigh, NC to name a few.

By incorporating intuitive online capabilities, configurable workflow, dynamic reporting, seamless integration and human-centered design principles, Tyler's EnerGov solution is uniquely equipped to assist the *Department of Doing* in advancing its primary goals of improving citizen interaction through culture, proactivity, and anticipating the needs of the customer.

Tyler's 30+ years of government focus and employee dedication enables clients to leverage a vast network of experience and domain knowledge with every project. We are committed to this strategy and believe in utilizing our deep breadth of industry experts to facilitate innovation within the government technology marketplace.

Tyler Technologies, Inc. is the largest government sector software provider in the United States with over 15,000 customers, 1 million SaaS Subscribers, 4,200 employees, and 500+ million dollars a year in revenue. Our commitment to and investment in the government technology market is our sole focus and is unparalleled by our competitors.

Please contact Garth Magness, Sr. Account Executive at 888.355.1093 ext. 763104 or via email at Garth.Magness@tylertech.com if you have any questions regarding the response contained herein.

Sincerely,

Dane Womble
President – Local Government Division, Tyler Technologies, Inc.

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EXECUTIVE SUMMARY

In response to RFP No. DODX-180049-GD, Tyler is pleased to offer its EnerGov® Enterprise Permitting and Land Management Suite as the optimal solution. The response herein reflects our understanding of the City's goals, objectives and requirements as well as a testament to our ability to deliver the products, services and support needed for a successful project.

CHOICE

Although you will review many options during this evaluation process, our goal is to make your choice an easy one. With Tyler, there is no need to move from vendor to vendor, solution to solution, or technology to technology. Our software is an integral part of a community of employees, customers, and partners who all share a passion for serving the public. As part of that community, the City will have access to all the tools needed to efficiently manage its day to day operations. With the goal of being the last software company you ever choose, Tyler will work for and with you to consistently provide you with the broadest and most advanced public-sector solutions available.

PROPOSED CORE APPLICATION SOFTWARE

Tyler's EnerGov® solution is a customer-focused automation platform that assists leading government agencies in managing a more efficient and effective operation while empowering cities to better engage their citizens with enhanced access to information, processes and services.

Utilizing human-centered design principles as the foundation of our development lifecycle has yielded software solutions that are intuitive, familiar and client-focused. Moreover, our clients (you) and the constituents you serve (your customers) have a direct impact on the evolution of the software we deliver. This ensures that our software platform remains relevant and adaptive as new trends in business and technology arise.

ENERGOV PERMITTING & LAND MANAGEMENT SUITE (PLM)

The regulatory processes of intake, submittal routings, fee calculation, approvals and inspections can be complex and cumbersome at times. EnerGov's Permitting & Land Management software system makes these processes easier by automating governmental operations in land use planning, regulatory permitting, enforcement case management, inspections, citizen requests and more.

Permitting & Land Management
Permitting
Planning
Inspections
Projects
Impact Management

With EnerGov's enterprise application, permitting, planning, development review and enforcement can now be done at the click of a mouse or touch of a screen in the field.

PROPOSED APPLICATION EXTENSIONS

iG WORKFORCE SUITE

iG Inspect is a powerful mobile application that allows government field workers to quickly and easily manage inspections for buildings, land use, environmental, health, safety and compliance. iG Inspect provides comprehensive management of the daily inspection process from research, review and inspection checklists to digital signatures and printing capabilities.

iG Enforce is the industry's only comprehensive mobile application that allows government agencies to manage enforcement case workflow in the field and on the go. This workhorse complements EnerGov's powerful back office software, streamlines the enforcement process and enables staff to proactively manage cases directly from a mobile device.

ENERGOV GIS (BUILT ON ARCGIS SERVER)

As an Esri Worldwide Partner of the Year and recipient of Esri's Mobile Technology of the Year award, EnerGov provides industry-pioneering enterprise GIS integration capable of fully leveraging an agency's GIS and introduces a new dimension of spatial capabilities to the agency and the process. EnerGov GIS provides unparalleled, out-of-the-box Esri ArcGIS integration.

ENERGOV CITIZEN SELF-SERVICE (CSS)

EnerGov Citizen Self Service is a fully integrated component of the EnerGov system that extends its flexibility and functionality across the web. EnerGov CSS provides your citizens with 24/7 access to application-related services online. CSS is highly configurable, which enables each district to define the specific information and processes that will be made to your citizens on-line.

- Online License & Permit Applications
- Online Application Status Checks
- Online Inspection Requests & Cancellations
- Online Citizen Request Management
- Online Payments
- Online Access to Meetings, Hearings and Approvals
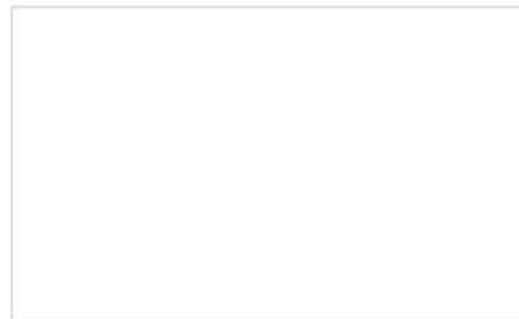
MYGOVPAY PAYMENT PROCESSING

EnerGov's government specific payment processing product-line – seamless and secure "out-of-the-box" integration has been developed to ensure world-class payment processing that will always be supported and maintained. The system utilizes the technology backbone ('powered by") of EnerGov's preferred credit card processing partner.

IMPACT & CONDITION MANAGEMENT

Managing fees and conditions resulting from Rezoning and Special Use Permit approvals can be time-consuming and littered with oversights. EnerGov's Impact Management module eases the load by automatically adding impact fees and conditions to applicable permits or plans.

- Impact Management adds relevant fees and conditions to the associated records, allowing employees to spend their time where it counts.

- Associate cases with spatial areas and define what type of conditions will be applied to parcels intersecting this area.

- Track the overall progress of the impact case with statuses, dates, attached records, and conditions, and how much money has been collected to date.

- Add multiple monetary and non-monetary conditions to an impact case. Customize when the conditions should apply to associated records and how to assess the conditions.

- Use fee allocation tools to automatically total how much money has been collected to date, how funds have been allocated, and the remaining funds balance.

ENERGOV IVR (INTERACTIVE VOICE RESPONSE)

EnerGov's IVR Telephony completely automates the inspection scheduling process and provides a quick and user-friendly method by which contractors and citizens can interact with your agency. All inspection requests are managed through the automated system and routed to the appropriate department. Upon completion, inspection results are automatically delivered (via voice, email or text) to the contractor without requiring any staff intervention - allowing key personnel to devote valuable time and resources to other tasks.

- Toll Free Automated Requests & Cancellations
- Toll Free Automated Permit, Plan and Inspection Status Inquiries
- 24-hour information access
- Unlimited Incoming Phone Lines
- Toll free 1.800 #

ENERGOV ODATA & REST APIS (INTEGRATION TECHNOLOGIES)

EnerGov OData, allows your government organization more connectivity, flexibility and transparent communication with constituents. Create specialized applications for the Web, mobile devices, GIS environment or other external or community-based uses which display a personalized combination of open source data most pertinent to those you serve.

Additionally, Tyler's packaged REST-based APIs provide the requisite tools for developing intelligent interfaces between EnerGov and other line of business solutions currently in use by each agency.

IMPLEMENTATION APPROACH

We know that implementing a new system is not easy so we have tailored our solution to assist the City of Gainesville with this transition. To that end, our proposal provides a full range of services designed to help you get the most out of our products which includes:

- **Project Management, Assessment & Configuration Services** - Using a proven implementation methodology along with years of experience working with customers just like you, our project managers will help insure your transition to the Tyler product is a success.
- **Data Conversion & Integration Services** - With hundreds of conversions over 20 years, and staff dedicated specifically to that responsibility, Tyler Technologies has the experience and skill to effectively manage the complexities of converting data to a new technology.
- **On-Site Training & Production Support** - Our proposal includes training to be administered on-site. Our trainers and managers work together to ensure that any issues that require follow-up after a training session are tracked and resolved to your satisfaction.

TRAINING

At Tyler, our clients expect to receive the right training for their needs because learning the tools, benefits, and powerful functions is part of the process. It's a fact that fully trained clients who understand how to use Tyler products are able to do their jobs better, period. To that end, Tyler offers multiple training options to fit your needs including:

- Onsite Training
- Group Training
- User Groups
- Online Training Center
- Annual Users Conference

CONTINUAL SUPPORT

The goal of the Tyler Support department is to provide expeditious technical assistance to Tyler software users in overcoming issues, understanding functionality, and recommending approaches to various scenarios. We strive to answer your questions quickly and accurately.

In addition, Tyler offers technical support and ongoing educational opportunities that tie into your technical support experience. These options allow our clients to focus on their day-to-day jobs, and work more efficiently.

No IT team? We can handle that! New employees? We can get them up to speed! Tyler is here to help.

Tyler offers multiple ways to contact your support personnel, as well as access to thousands of users across the country who have the experience to help you utilize the software to your greatest benefit.

- Dedicated Support Team
- LIVE telephone support
- Unlimited toll-free telephone support
- Online support options (FAQ, Knowledge Base, email, chat, etc.)
- Review past incidents, log new incidents, check for solutions, and update your information with the online support portal
- Remote diagnostics and fixes
- Tyler Community - Ask Questions, Get Answers, Connect with Peers, and Find New Information through Tyler's online and interactive knowledgebase forum
- Complete documentation, linked directly from the software

COMMITMENT

At Tyler, we are uniquely qualified to meet the needs of the City through our experience, our software, and our absolute commitment to customer satisfaction. That commitment, along with the consistent evolution of technology and software features, has resulted in a retention rate of more than 99% and long-term relationships with our users. With more than 15,000 customers, this partnership is an integral part of who we are and what we do. Our customers have a direct impact on the evolution of the software and the processes involved in implementing and supporting it.

PROTECTING YOUR INVESTMENT FOR YEARS TO COME

Tyler's "Evergreen" Development Philosophy insures that the City will always have industry-leading functionality that utilizes current technology. As part of our annual support fee, all enhancements to our software are provided at no additional charge. This allows our users to continue to take advantage of new advances without having to relicense the software.

PARTNERSHIP

We want to thank you for the opportunity to respond to your Request for Proposal and for your time and consideration during the review process. At Tyler, we feel the evaluation and selection of new software should be as much about people as it is product with the ultimate decision resulting in a partnership between the customer and their chosen software provider. It is our firm belief that Tyler Technologies is uniquely qualified to be that partner and more than meet the needs outlined by the City in this solicitation.

TECHNICAL PROPOSAL

Minimum Requirements

The vendor must provide all the following features associated with a permitting/land management system:

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1. Citizen Facing
   a. The system will have a robust, intuitive citizen portal

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2. Interface to City Payment system
   a. Connection to end-to-end automated payment system

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3. Issue permits/entitlement and licenses, each with its individual workflow

4. Enables customers to schedule inspections
   a. Enables customers to schedule building inspections via mobile enabled devices and links with voice recognition for phone requests for inspections
   b. Enables customers to select whether the inspection is in the AM or PM
   c. Sends customers an email to confirm a scheduled inspection

5. Mobile-enabled
    a. End-to-end mobile device enabled for internal and external users.
    b. Application, scheduling, tracking and payment for customers.
    c. Management, reporting and tracking for staff.

6. Reporting, Benchmarking & Dashboard
    a. Includes reporting capabilities, benchmarking tools and a dashboard.
    b. Easily create customized reports

7. ArcGIS Services are source of spatial data
   a. ArcGIS services published by the Property Appraiser, e911 and the City will be the source of spatial data
   b. Ex.) zoning, homestead exemption status, jurisdiction, flood zone context area, historic preservation context area, wellfield context area, land use designation, Enterprise zones, CRA districts, Parking zones, Parcels, e911 addresses

8. Parcel Based
   a. All data has unique parcel number as unique id.
   b. Ability to link to previous parcel number.

In addition, the City envisions that the vendor may provide all or a portion of the following features associated with a permitting/land management system:

1. Migrate legacy data into convention
   a. All data from Innoprise, BDS & eWacker in a searchable format is migrated to new database

2. Route inspections using GPS
   a. Locate and view entitlements, violations and inspections using GIS/ GPS

3. Enables customers to search for past entitlements
   a. On-line search for previous entitlements on a property (i.e. building permits, land use & zoning, lot splits, etc.)

4. Integrated
   a. Seamless integration with other systems (i.e. ProjectDox, OpenText, Synovia, ArcGIS, SeeClickFix, telephone voice recognition software)

5. Mobile App
    a. Public facing app to do all building and planning business.

TYLER'S ENERGOV SOLUTION

Tyler Technologies is dedicated to developing, implementing, and supporting software solutions that are tailored specifically for the public sector. Our specialized expertise and experience in this area gives us the ability to provide solutions that address the varied yet unique needs of this type of organization, positioning Tyler as a leading provider of software for the public sector. Tyler's EnerGov solution assists our Clients in managing a more efficient and effective operation while empowering government to better engage their customers through enhanced access to information, processes, and services.

ENERGOV PRODUCT ECOSYSTEM

EnerGov is the public-sector's leading permitting and land management system and helps our clients achieve a more efficient, streamlined and citizen friendly enterprise operation.

The EnerGov product suites are specifically designed to automate and centrally connect the critical processes of land use planning and project review, permitting, code enforcement, inspections, licensing and regulatory management, asset and work order management, infrastructure management, citizen requests and more.

BUILT FOR GOVERNMENT

EnerGov is specifically designed to automate and centrally connect the critical business processes government agencies require related to regulatory management and the administration of infrastructure assets.

COMPLETE MANAGEMENT SOLUTION

Complete solution and full lifecycle management for automating tasks associated with critical functions such as land use planning and project review, permitting, code enforcement, inspections, licensing and regulatory management, asset and work order management, citizen requests and more.

ENERGOV HIGHLIGHTS

ADVANCED AUTOMATED WORKFLOW

EnerGov is an enterprise management application that encompasses all aspects of the application, review, issuance and enforcement lifecycle. Central to the management process is the concept of enterprise workflow and process regulation, both of which are achieved through native workflow design tools.

INDUSTRY LEADING GIS INTEGRATION

EnerGov has partnered with Esri technology and actively maintains support for the latest versions of the ArcGIS platform. EnerGov provides industry-pioneering and award winning Esri-based GIS integration that introduces a new dimension of visualization, analysis and business management capabilities to Agencies like yours. EnerGov GIS adds a powerful facet to the EnerGov suite of products by enabling a GIS-centric approach to an Client's business process management.

PERSONALIZED INTERFACE

The EnerGov Workspace is the user interface that runs in the program shell. Within the workspace, an unlimited number of customized, role-based screens can be created. The workspace includes data processing screens, widgets, search results, external web pages, and more.

WIDGETS

EnerGov workspaces are customized by including role-specific widgets that track and display role-relevant data. Widgets can include application shortcuts or favorites menus, commonly searched terms, system notifications, pinned or scheduled reports, or sets of data within the application.

KEY PERFORMANCE INDICATORS (KPI)

One of the strengths of role-based work stations is the ability to add KPIs relevant to the user's work processes. Whether that's a list of work orders to process, information about the status, or number of current tasks, KPIs are an instrumental part of developing a more efficient work process.
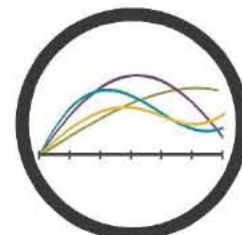
REPORTING

EnerGov provides multiple reporting options as well as graphical grid construction tools which enable system users to construct customized, on-demand views and filters of performance and process data which can be used to readily identify trends, associations, performances, and relationships.

TASKS AND NOTIFICATIONS

EnerGov enables users to stay connected and informed whether in the office or in the field through a centralized task and notification engine. Automated reminders and notifications of pending tasks / actions are routed to appropriate personnel according to the Client's prevailing workflow.

CENTRAL CONTACT MANAGEMENT

EnerGov utilizes an enterprise contact management console to catalogue and centrally track citizens and the individuals conducting business with the City. This allows the City a number of advantages including enterprise access to contact records, correspondence, fees, applications, documentation, and more.

CENTRAL CASH MANAGEMENT

All payments and transactions, regardless of origin, are processed through a centralized cashiering console. EnerGov provides an unprecedented level of configurability with regard to fee calculation and fee assignment. Even the most daunting fee schedules are easily configured and promoted through an intuitive graphical user interface.

ENERGOV SELF SERVICE

The public's view of local government is important to community development. Citizen demands can push or sink local projects, as well as impact budgets and staff morale.

We understand that maintaining effective communication with your citizens and incorporating them into the community development process is vital to your organization.

Tyler's EnerGov™ Citizen Self Service Web portal gives constituents and contractors dynamic access to information and enables them to perform a wide range of tasks at the click of a button. Citizens and contractors can search for a parcel, apply for a permit, request an inspection, pay invoices and more – 24/7/365.

- 24/7/365 access for citizens and contractors
- Powerful search capabilities utilizing Esri GIS and EnerGov data
- Real-time updates of submittals, request and payments
- Point-and-click administration interface
- ADA (WCAG 2.0 AA) compliant
- Developed on HTML5 technology

ENERGOV ODATA & REST APIS

EnerGov's open data service, EnerGov OData, allows your government organization more connectivity, flexibility and transparent communication with constituents than ever before. Using OData, your IT staff can create specialized applications for the Web, mobile devices, the GIS environment and other external or community-based uses which display a personalized combination of open source data most pertinent to those you serve.

Additionally, Tyler's packaged REST-based APIs provide the requisite tools for developing intelligent interfaces between the EnerGov application and any number of 3rd party / existing line of business solutions currently in use by each agency.

FLEXIBLE DEPLOYMENT – ON PREMISE OR CLOUD

As a web and cloud-capable platform, EnerGov offers flexible deployment with the option of hosting and maintaining their IT infrastructure on premise, within an Client's private cloud, or within the Tyler Cloud (Tyler hosting and application availability services).

UNLIMITED SCALABILITY AND SUPERIOR CONFIGURABILITY

EnerGov is a platform technology that can be sized and scaled according to the needs and demands of each Client. Native system administration consoles provide superior configuration capabilities and the tools to automate even the most demanding process workflow.

EnerGov features dynamic built-in tools native to each software suite/module that embraces extensibility and provide our clients with the ability to define, capture and manage site-specific processes, workflows, custom forms, business rules, etc. These tools are powerful, intuitive, and accessible to authorized users and foster growth as new Client mandates and procedures are adopted and implemented.

THE FUTURE OF ENERGOV

Government agencies look to Tyler Technologies for industry leading solutions in the form of scalable, integrated software that make it easier for government agencies to manage their day-to-day, complex functions. We are committed to designing, developing and deploying spatially enabled software solutions that provides efficiencies for and connects all departments, mobile users and citizens alike. The foundation of this commitment is an aggressive investment in product development to extend existing functions, add innovative new features and integrate among Tyler products.

Our EnerGov product development teams understand that your business is more than approving plans, issuing permits, enforcing ordinances and maintaining public infrastructure. EnerGov products are designed to help you meet your ultimate goals of guiding orderly growth, promoting safety and livability, fostering economic vitality and encouraging community collaboration. The future direction

for Tyler's EnerGov software leverages the latest web technologies, spatial capabilities and industry standards while remaining focused on your goals to help you attain the success you require.

Input to our product roadmap comes from several sources. Current customers provide suggestions through a collaborative enhancement request forum within our Tyler Community. Another source of influence comes from prospective or new customers who identify new scenarios with specific pain points that can be solved by leveraging or enhancing functionality within EnerGov. Lastly, Tyler employees continually monitor industry and technology trends and proactively respond to the changing needs of the market resulting in the innovation, functionality and flexibility you come to expect from EnerGov software.

PERMITTING & LAND MANAGEMENT

Automate land use planning, project review, permitting, inspections and the management of impact cases and objects with the EnerGov Permitting and Land Management Suite. With this multi-dimensional software, urban planning is easily done with the click of a mouse or touch of a screen. Your processes will be more efficient and communication will be on the way up while data errors will plunge. That means revenue has the potential to spike, and your return on investment may be captured sooner than you think.

FEATURES AND HIGHLIGHTS

MANAGE YOUR WORKFLOW

You will experience unparalleled flexibility in automating your organization's permitting, regulatory land use and enforcement processes when you deploy the Permitting and Land Management Suite. Superior configurability options allow for even the most complex business processes and workflows to be managed throughout the entire process lifecycle in a quick and efficient manner. Stop just tracking data, and start realizing the benefits and efficiencies that managing with EnerGov affords.

MANAGE OBJECTS

When you struggle with permitting equipment such as boilers, elevators and objects in a right-of-way that may have no address associated with them, think EnerGov. Our Object Management module helps uniquely identify these items and trace them through the permitting process.

MANAGE IMPACT CASES

Finances and permitting oversight can be a challenge to manage while you are regulating construction projects, and disparate systems can quickly turn project management into a difficult task. Impact Management solutions from EnerGov help you manage conditions of approval that impact project delivery so compliance is ensured and revenue collections are more timely.

REDUCE ERROR, LIABILITY AND INCREASE REVENUE

Automating with EnerGov's Land Management Suite is a smart investment that can minimize human error and limit your agency's liability as it relates to permitting and regulatory land use. Flexible enough to take charge of escalation procedures and required operational steps, it is also solid enough

to perform accurate jurisdictional GIS and decision-making analysis across the agency. With EnerGov Land Management, you never have to worry if conditions and land use requirements are maintained or enforced, or if corresponding information is tracked.

STREAMLINE YOUR OPERATION

We realize resources can be scarce, and that makes it tough to manage the process of regulating and enforcing in a timely manner. EnerGov's Land Management Suite assists in this process by streamlining and automating many of the time-consuming processes from intake to task and field inspection routing or creating a fully automated regulatory environment.

PERMITTING & LAND MANAGEMENT SUITE

EnerGov's flexible system allows you to customize business processes for varying departments while maintaining the integrity of working within one, centralized system. Records in EnerGov can be directly linked to your GIS data, allowing users the ability to see important land-data and make more informed decisions. Tracking plan submittals and their associated reviews, organizing revisions, scheduling meetings and hearings, verifying contractor licenses, issuing permits, collecting fees, and managing the inspection process are tools that will help you streamline your process. EnerGov's ability to manage conditions, holds, GIS information, and historic data help to create a clear picture of the work being managed.

PROJECT & LAND USE MANAGEMENT

From smaller local projects to large-scale land development, Permitting & Land Management's Project Management module keeps related permits constantly accessible during the project management phase. Parameters for the number and type of allowable plans or permits can be easily controlled, and conditions for each are easily established in accordance with local ordinances.

- Group related permits, plans, and code enforcement activity into one Project. Manage and view the status of the overall project, along with being able to see key details of associated records and easily access full record history.

- Track time spent on the project that can be used for reporting and/or to calculate fees.

- Create parent and child project hierarchies to manage critical relationships between multiple projects.

- Enhanced search capabilities allowing users to search by both current and historic project names.

- View all associated records in a timeline and map format using our project genealogy tool. Provides users with a visual display of the project's history and progress.

PLAN MANAGEMENT

All types of plans at any project level can now be assessed with electronic plan review functionality. While actions within the workflow may be limited based on the type of record you are displaying, your productivity certainly won't be. And if you need to measure public outreach, review and hearing

processes, it's no problem since the Plan Management module tracks all actionable items from meetings and hearings.

- Create highly-customized workflow to manage the most complex to the simpler day-to-day tasks completed by the planning department. Color-coded and automatic versioning of the workflow helps planning managers view the progress of a project and track what the next steps are.

- Create meetings and hearings that will display on a centralized calendar. Track staff members and the public who have been invited and record history and notes. The calendar is also visible online for citizens to see what upcoming meeting and hearings they have scheduled with the jurisdiction.

- Use GIS tools to create mailing lists that can be linked to the plan record to send public notices.

- Generate documents and reports, such as public notices and letters, using the information entered on your centralized EnerGov record.

- Manage the submission of documents and subsequent reviews. Clearly marked and versioned workflow items tracks dates, comments, and outcomes.

- A variety of routing options allow you to determine how item review assignment should occur. Popular options include GIS Zone-to-Reviewer assignment, departmental load balancing, or using pre-determined review teams.

- Electronic Plan Reviews allows citizens to upload files through a portal. The files are added directly to the associated record.

- Plan Reviewers can manage their reviews through user-friendly workstations. Reviewers can add corrections from a library of codes. When using eReviews, reviewers can link their markups directly to corrections.

- Share submittal results with involved parties through citizen portals or through correction letters that can be generated directly from EnerGov.

PERMIT MANAGEMENT

In a perfect world, approvals would come exactly when you need them. EnerGov's permit software helps your agency deal with the reality of project details and cycles by color coding differing versions of plan review submittals and inspections so that project history can be tracked and fee revenue can be collected or recaptured.

- Create permits directly from a user-friendly GIS-viewer. EnerGov can display relevant GIS data on specific records to automatically fill in fields, add requirements to workflow, or create alerts.

- Utilize the permit record to create a complete, historical picture of what work was applied for, on what property, and who it is associated to. Automatic history-tracking is applied to all

records to create a full story. Ability to track notes, meetings, emails and phone calls to add to this historic data.

- Customize workflows to manage the submittal, review, approval, issuance, inspection, and finaling processes for your various departments. Due dates and assigned to fields allow multiple departments to interact with a single record seamlessly.

- Advanced fee calculation and cashiering options allow tracking payments made on records, billing contacts, and to easily retrieve invoice and receipt information. Widgets and advanced search screens allow managers to track overall fees collected to date to provide a comparison of revenue to date this year compared to last year.

- Automatically verify contractor and subcontractor licenses at the time of application and at permit issuance.

- Utilize conditions of approval and holds to prevent actions from happening on the permit unless certain milestones have been reached or critical issues have been addressed. Helps the users by providing the data up-front and minimizes the risk of errors.

- Associate cash or performance bonds to permit records. Manage partial and full releases accordingly.

- Save time on data entry by copying permits when someone is applying for multiple of the same type of permit.

- Extend the life of a permit automatically based on active inspection requests.

- Renew permits using customized renewal cycles to generate and pay invoices and to extend the permits' expiration date.

- Upload and view (if user security allows) attachments associated to the permit.

- Use documents, reports, widgets, and searching tools to capture critical information regarding history and trends. Plot search results on the map to view the data from a new point-of-view.

INSPECTIONS

Are you looking to take a greener approach to inspection management? Tyler can help. By receiving and scheduling inspection requests electronically, your office will see a significant decrease in phone calls and foot traffic, all interested parties will stay updated and communication will increase while you shuffle less paper. Field workers can also manage the inspection cycle through EnerGov's mobile applications and keep everyone updated in real time or as soon as connectivity is available.

- Empower citizens to request inspections through a citizen portal or through an automated phone system (IVR). Flexible configuration options allow you to further define how many inspections can be request for a day, cut-off times to request inspections for the following day, and much more!

- Easily track which inspections are associated to different projects—visible statuses, version, and inspector notes help track the inspections' history.

- Utilize a variety of scheduling and assignment options including the ability to auto-schedule inspections, assign inspections using load-balancing, use GIS to assign inspectors to zones, and many other options.

- Workspaces designed specifically for inspectors to view the work that's assigned to them, add notes, and update statuses. Inspectors also have quick links to see associated project and parcel history.

- Our iG Inspect product allows inspectors to view inspections in the field, including previous inspection history. Inspectors can take notes, update status, take pictures, and email reports directly from the field.

OBJECT MANAGEMENT

While a lot of permits and plans are associated to an address and/or parcel, sometimes you may need to permit against an object such as an elevator. Objects can be linked directly to a permit, plan, or to other objects.

- Track the status of the object independently. Review the status of each associated object on the originating permit or plan record in a user-friendly grid.

- Create a hierarchy of objects between parent objects and children objects to efficiently manage the connection between multiple objects.

- Track and manage critical dates such as created date, installation date, and operation start and end dates.

- Capture information specific to each type and classification of object using standard and customizable fields.

IMPACT MANAGEMENT

Managing fees and conditions because of impact cases such as Rezoning and Special Use Permit approvals can be time-consuming and littered with oversights. The Impact Management module eases the load by automatically adding impact fees and conditions to applicable permits or plans. An overall impact case will track the associated records by recording total money collected to date, the number of records impacted, and much more!

- Empower those interacting with customers to have the most updated and dependable information possible already reflected on the records they are working with. Impact Management will add relevant fees and conditions to the associated records, allowing employees to spend their time where it counts.

- Draw impact polygons on the map using EnerGov user-friendly GIS viewer. An impact case can be associated to this polygon to define what type of conditions will be applied to parcels intersecting this area.

- Track the overall progress of the impact case with statuses, dates, attached records, and conditions, and how much money has been collected to date.

- Add multiple monetary and non-monetary conditions to an impact case. Customize when the conditions should apply to associated records and how to assess the conditions.

- Use fee allocation tools to automatically total how much money has been collected to date, how funds have been allocated, and the remaining funds balance.

- Flexibility and advanced impact fee setup options including adjustments based on inflation.

ENERGOV MOBILE APP SUITE

Ready for iGovernment? Take your mobile workforce to the next level with EnerGov's Mobile App Suite— an industry-leading government platform for the next generation of mobility. Created to offer a comprehensive mobile workforce platform for field users, these award-winning apps give you mobility, flexibility and stability for the information that's most important to you.

iG INSPECT APP

iG Inspect is a powerful mobile application that allows government field workers to quickly and easily manage inspections for buildings, land use, environmental, health, safety and compliance. iG Inspect provides comprehensive management of the daily inspection process from research, review and inspection checklists to digital signatures and printing capabilities.

iG ENFORCE APP

iG Enforce is the industry's only comprehensive mobile application that allows government agencies to manage enforcement case workflow in the field and on the go. This workhorse complements EnerGov's powerful back office software, streamlines the enforcement process and enables staff to proactively manage cases directly from mobile device. Free your staff! Any agency worker associated with enforcement management can complete tasks in real time without being anchored to a desktop.

ENERGOV IMPLEMENTATION

Tyler's implementation process demonstrates our long-term commitment to our public sector clients. Our implementation process is a project roadmap that takes you from software installation up to the daily, normal use of the new software system. Tyler's goal is to provide the best software, services and support to you, our clients. Your organization benefits from the fact that we perform our own implementations and know our software better than anyone. As a Tyler client, you receive guidance throughout implementation from experienced Tyler professionals who have implemented Tyler products in more than 8,000 public sector implementation projects.

PROVEN APPROACH

Tyler utilizes a proven stage-driven implementation approach. An approach of this nature is preferable because it allows for ongoing validation of system decisions throughout the project as improved knowledge is learned and shared during each stage. The stages build on one another, allowing the project to progress with the goal of delivering a refined and mature solution which meets your policies and procedures, while taking into account best practices recognized in the industry. Moreover, this approach ensures that process-specific details are mastered prior to moving to each subsequent stage. A formalized sign off process, defined by major objectives, deliverables and outcomes, is the key to a successful implementation.

METHODOLOGY

Tyler's methodology is straightforward and based on three vital foundations: industry experience, expert resources, and a globally-recognized project management approach. We combine our in-house expertise in successful implementations and integrate it with the principles of the Project Management Institute® (PMI), a globally recognized organization dedicated to the project management profession.

Utilizing the five process groups outlined in the PMI's *PMBOK® (Project Management Body of Knowledge) Guide* — Initiating, Planning, Executing, Monitoring and Controlling, and Closing — we deliver a tested and proven approach to every project. We have integrated industry tools and technologies from PMI with Tyler's implementation experience, to yield a proven approach that is tailored specifically to the public sector. Our project managers are trained to maintain the professional standards of PMI.

Tyler's trained personnel perform and guide all aspects of an implementation. Our staff consists of seasoned professionals with years of experience, and unique and proprietary skills, specialized in managing and delivering projects focusing on your business processes.

Our implementation process also emphasizes the importance of cultural change management. This is how we guide you through the changes that accompany implementation of a new software system and help to ensure a smooth transition. Our implementation staff is experienced in analyzing policies, procedures, and organizational needs. The proof of our approach is in the outcome — a successful implementation.

Throughout a project, we establish control points (critical review points) to ensure your organization fully understands and accepts the project progress. It is at these check points that your stakeholders monitoring the overall project must formally accept the project to date. Once there is formal acceptance, the project will proceed to the next stage.

Tyler takes pride in our implementation process and deliverables. We focus on you and setting you up for success. Our product experts strive to gain understanding of your needs and current business practices, while recommending best practices to best leverage your new technology. Our implementation process positions you to successfully utilize Tyler products at go-live and to consume the new technology developments delivered through our software releases and upgrades.

IMPLEMENTATION METHODOLOGY OVERVIEW

The Tyler approach, built upon PMI process groups and our industry expertise, is depicted on the following high-level illustration.

WORK BREAKDOWN STRUCTURE

PMI utilizes a Work Breakdown Structure, or WBS, to depict overall project work. Tyler uses this key PMI tool to show our implementation approach in greater detail.

STAGE 1

1.1 0 — Initiate & Plan

- **1.1.1** Tyler Internal Coordination & Planning
- **1.1.2** System Infrastructure Planning
- **1.1.3** Project/Phase Planning
- **1.1.4** Project Schedule
- **1.1.5** Stakeholder Presentation
- **1.1.6** CONTROL POINT 1: Initiate & Plan Stage Acceptance

STAGE 2

1.2.0 — Assess & Define

- **1.2.1** Fundamentals Review
- **1.2.2** Current/Future State Analysis
- **1.2.3** Data Conversion Planning & Mapping
- **1.2.4** Standard 3rd Party Data Exchange Planning
- **1.2.5** Customization Analysis & Specification*
- **1.2.6** Forms & Reports Planning
- **1.2.7** System Deployment
- **1.2.8** CONTROL POINT 2: Assess & Define Stage Acceptance

STAGE 3

1 3.0 — Build & Validate

- **1.3.1** Configuration & Power User Training
- **1.3.2** Data Conversion & Validation
- **1.3.3** Standard 3rd Party Data Exchange Validation
- **1.3.4** Customization Delivery & Validation*
- **1.3.5** Forms & Reports Validation
- **1.3.6** CONTROL POINT 3: Build & Validate Stage Acceptance

STAGE 4

1.4.0 — Final Testing & Training

- **1.4.1** Cutover Planning
- **1.4.2** User Acceptance Testing
- **1.4.3** End User Training
- **1.4.4** CONTROL POINT 4: Final Training & Testing Stage Acceptance

STAGE 5

1.5 0 — Production Cutover

- **1.5.1** Final Data Conversion
- **1.5.2** Production Processing & Assistance
- **1.5.3** Transition to Tyler Support
- **1.5.4** Schedule Post Live Services, if applicable
- **1.5.5** CONTROL POINT 5: Production Cutover Stage Acceptance

STAGE 6

1.6.0 — Phase/Project Closure

- **1.6.1** Close Phase/Project
- **1.6.2** CONTROL POINT 6: Phase/Project Closure Stage Acceptance

* - If included in project scope

STAGE 1: INITIATE & PLAN

This stage of the implementation process commences once a contract has been signed. The project starts with the implementation team comprised of your executive sponsor, project leader and the Tyler project manager, who work together to define project expectations and establish a baseline project plan and schedule. During the Initiation stage, the Tyler team leads discussions with you to

begin system infrastructure planning, outline goals and timelines, and finalize processes for the implementation of all products in the scope of the project.

As part of the Planning step of this stage, project stakeholders within your organization are identified. These stakeholders monitor the overall project and are essential to a successful implementation. They ensure that the project is aligned with your larger goals. This group, in conjunction with Tyler's project manager, is responsible for monitoring the project and providing formal acceptance of each stage. Once stakeholders are determined, functional leaders are chosen for the project to provide expertise on your business processes. Implementation Management Plans are provided to all, which outline the management of scope, schedule, quality/testing, resources, communication, upgrades and risk. These plans may be updated in cooperation with the project team.

The Planning and Initiation stage concludes with a high-level project schedule Stakeholder Presentation to all of your key project stakeholders.

STAGE 2: ASSESS & DEFINE

The Assess and Define stage starts with a fundamental review to provide your project team with a preliminary knowledge transfer of how the system functions. The goal of this stage is to examine and analyze your unique business needs and to translate the findings into a system design plan as an output. Tyler's consultants and your subject matter experts perform a Current/Future State Analysis of your current and required future business processes. The system design plan addresses key business drivers, which ensures that all requirements for a successful implementation are presented and accepted. Additional outputs of this stage consist of a plan addressing and identifying data conversions, standard data exchanges to third party systems, and forms and reports.

The Assess and Define stage concludes with a formal acceptance of the defined deliverables and project outcomes.

STAGE 3: BUILD & VALIDATE

After the system is built, your internal team will work with the Tyler team to establish and validate the system configuration and complete due diligence for systems readiness during the Build & Validate stage. Your project staff validate the system design, converted data, standard third party data exchanges, forms and reports. A strategic component of this stage ensures the key individuals are trained and enabled for self-sufficient system operations.

Once trained, validation and testing procedures commence in an iterative fashion for data conversions, third party data exchanges, employee and citizen-facing forms, and key stakeholder reports.

This stage is considered completed when the primary/key users have reviewed the system configuration to ensure that they are in alignment with the business processes, goals and objectives of the project.

STAGE 4: FINAL TESTING & TRAINING

The Final Testing & Training stage is designed to facilitate maximum knowledge transfer. Together with the Tyler project manager and implementation consultants, we will develop a cutover plan which will detail the critical items that need to be completed in order to go live, such as: final trainings, interface testing and validation, conversion cutover schedule and timing, User Acceptance Testing (UAT) and the training schedule to roll-out the system

Prior to end-user training, your users will follow detailed test scripts through a UAT process to ensure proper validation of the system is performed. UAT ensures that all data and configuration needs have been met and that the software is ready for day-to-day business processing.

This stage concludes with final training for your end users and formal approval of the system's readiness to support your business processes prior to moving forward to go-live.

STAGE 5: PRODUCTION CUTOVER

The vital stage of Production Cutover is comprised of production and post production support. Final data conversion is completed as necessary. All the prior training and planning now culminates as your organization is self-sufficient within the new Tyler environment. Now you are operating in the production environment with the support of the Tyler project team. If required or planned upon during the initial stages, post-live education and training is implemented.

The phase closes with a transition to the product support team.

STAGE 6: PHASE/PROJECT CLOSURE

The final stage of implementation, Phase/Project Closure, is to bring a formal closure to the project phases, or to the whole Tyler implementation if no additional phases are required. Through a formal project close-out meeting and acceptance from stakeholders, both teams formalize the completion of a successful Tyler implementation. The deliverables completed through the project close-out meeting may include such topics as lessons learned, a review of accomplishments and final acceptance of the project work completed.

PROJECT RISKS AND MITIGATION

As with any major project, there are risks both large and small inherent to implementing a new software system. That is why you need experts to guide you through the process from start to finish. Tyler has been delivering software solutions to the public sector since 1966. Our vast experience and adherence to the industry-leading Project Management Institute (PMI) approach to project management give Tyler the knowledge to measure risk and to implement procedures which mitigate and minimize risk to our clients.

During the planning stage of the project potential risks and mitigation techniques are discussed to limit impact in a successful project. The largest project risks inherent with a software implementation of this size are in the adoption of change and the follow through on meeting your stated goals. In every project, there are people and departments that are resistant to the change needed to fully utilize a new system. It is important that these individuals and groups be identified early in the

project, and a communication and coaching plan be put in place to minimize their impact on the project and the intended results. Stakeholders can assist by communicating management's commitment to the project, establishing clear internal expectations for the staff, supporting change management efforts, enforcing changed business practices and holding resources accountable for completion of tasks necessary for project deadlines. Implementing a new software solution is a commitment that requires full buy-in from all levels and properly allocated resources for both time and effort. Ensuring that tasks are monitored and prioritized accordingly helps ensure a successful, on-time project completion.

The best way to minimize any risk and maximize the benefits of a Tyler implementation is to communicate and document decisions as thoroughly as possible during the planning stage of the project. A Risk Management Plan, Communication Management Plan, Change Management Plan, and Risk Register will all be part of the overall Project Plan. These documents will provide a list of the potential project risks, identify ways to mitigate the risk that each brings and describe what to do in the case of a risk impacting the project and how to compensate for that change. Communication and planning can help to prepare for risks and minimize the impact they have on the overall implementation.

ORGANIZATIONAL CHANGE MANAGEMENT

Public sector organizations of all sizes find it challenging to adopt new approaches and processes even when given the opportunity to do so through the implementation of a new software system. To realize the benefits our software can provide to our clients, it is necessary to adopt business practices and approaches that leverage the features and tools provided by Tyler. It is only through enterprise-wide adoption of new technology, processes and business practices, that the biggest improvements to key areas such as efficiency, data access and cost savings are realized as an organization. Organizational change management practices and principals are designed to help our clients through the change process, achieving a higher level of adoption and reaping the benefits of changes required by the implementation of a new software system.

Tyler's Project Managers are trained in change management and assist during the implementation process with the human side of change. Effective communication is one of the core components of change management: identifying who to communicate with, the proper communication methods and determining the timing, tone and content of the messaging. A communication plan encompassing these critical decisions will be updated during the planning stage of the project by both project teams. Tyler believes that for your project to be successful, change management must be sponsored from top down in your organization, because it requires a high level of adoption of desired changes. In addition, leveraging our extensive past experience, our project team will do everything possible to advise you in this process throughout implementation.

As a company, we embrace the following principles and utilize each in an effort to mitigate potential change management issues:

- Start to Finish: Change management must begin early on, and extend through and beyond the transition to the new system. Creating ownership early on is absolutely essential to a successful implementation.

- Integrated and Holistic Approach: Change management strategies must be integrated into overall project management and not treated as a separate and distinct effort. Additionally, since most agencies are experiencing multiple changes at any given time during the project, change strategies and efforts should be managed in a holistic way.

- Collaborate and Leverage Strengths, Experience: Working collaboratively with you ensures that the implementation process leverages internal capabilities, organizational knowledge and relationships, as well as Tyler's experience and expertise in navigating change. Moreover, collaboration and engagement are essential to building support, establishing ownership and gaining buy-in from all affected users.

- Engage and Rely Upon Key Stakeholders: Identifying and empowering representatives from primary stakeholder groups is fundamental to an effective change program, allowing the project team to obtain critical feedback on your needs and change acceptance at key milestones.

- Build on Established Change Methodology: Tyler builds on your established change methodology, if and where it exists, advising you on practices we have seen as effective in other projects similar to yours. Our intent is to supplement and strengthen it where possible.

- Create Frameworks and Build Capability: The most successful projects are those that build lasting capability within the organization, allowing internal resources to support and engender lasting change.

TYLER TESTING PLAN

A Quality Management / Testing Plan establishes processes and activities to ensure that project objectives outlined within the Implementation Management Plan are successfully implemented. The Quality Management / Testing Plan addresses both the project and the product, meaning that tests are conducted at appropriate times throughout the project and that they test different facets of the product as the future-state system evolves. The tests examine all of the implemented functions and processes to ensure that the goals and requirements for the project are fully satisfied.

PURPOSE

The Quality Management / Testing Plan defines and monitors critical milestones. Failure to meet critical milestones may negatively impact project timing, which could affect go-live.

It also provides a controlled environment for high-level product testing, taking into account full module integration, import and export interface integrity, functional flow and reliability.

METHODOLOGY

Although potential problems can be exposed using standard quality assurance testing methods, the project teams also conduct testing throughout the life of the project to expose issues that would

normally only be revealed in a production environment. A comprehensive testing plan is set in place and may include the following: system infrastructure audit, conversions, third-party data exchange, customization, form/reporting, configuration validation testing, and user acceptance testing. The Quality Management / Testing Plan will be mutually agreed upon prior to executing any of the tests.

OVERVIEW
SYSTEM INFRASTRUCTURE AUDIT

The foundation of the system is fully vetted to ensure that the system hardware meets specifications and vital system infrastructure information is available.

CONVERSION VALIDATION AND TESTING

Conversion proofing is performed after each pass of converted data is loaded. Control reports, filtering techniques, comparison reports and visual inspection are all part of this process. The purpose is to identify all issues with data, whether due to mapping inconsistencies, source data issues, data submission content or conversion programming errors. The goal is to have acceptance of conversion programming completed prior to the pre-live period so that final conversions have little or no risk of data or conversion programming issues. Final acceptance is necessary prior to live processing as the last step before data is loaded in the live database for live processing to begin.

DATA EXCHANGE TESTING

Exchange testing involves the observation of inter-module and third-party data flow and effect. Throughout the implementation, special attention is paid to the exchange integrity of the system which is validated via standard training, parallel testing and customization testing. Whether between Tyler applications or third-party exchanges, all aspects of functional integrity are tested thoroughly. Customization testing is performed to verify that contracted custom modifications delivered from Tyler work as specified in the approved product specifications.

SYSTEM DESIGN VALIDATION

Testing ensures that the system has been built to conform to the design determined during the Assess and Design stage, and that it complies with the business process decisions you have made. The purpose of the test is to provide an opportunity for validation of business process decisions in the actual application. A key part of the test is to conduct a transaction test, during which typical business transactions, specific to a given area of configuration, are duplicated and validated.

FORMS AND REPORT TESTING

Testing of your constituent-facing output — checks, invoices, bills, permits, report cards, etc. — is an essential component of the testing plan. Each constituent-facing form and report is validated using the data output created during the system design validation. This continues as a repeated and iterative process whereby testing occurs as your users validate processes, print these outputs as part of training sessions and perform User Acceptance Testing (UAT).

USER ACCEPTANCE TESTING (UAT)

The objective of UAT is to confirm that the system is ready for daily deployment and operational use. During UAT, your functional leads and power users are required to participate by testing the system's functionality, features and performance. Tyler guides you through this process by assisting in the establishment of a test plan and implementing routine communication protocols to ensure reported issues are prioritized and addressed based on established standards. Thorough end-to-end testing completed by your functional leads and power users sets the tone for the success of the production cutover process, both in system readiness for live transactions and in user proficiency in the software tools prior to go-live.

THE BENEFITS OF TESTING

Through this process, end-users gain extensive product experience, develop a high level of confidence in Tyler's products and understand their specific functions within the system. Expected benefits from the completion of these tests also include:

The infrastructure of hardware and network design is thoroughly tested

Customizations and exchanges are fully integrated into the product

A managed issues list is fully quantified

SOFTWARE ENVIRONMENTS

Customizations, exchanges, conversions and other data and programmatic elements are tested in a non-production environment. This environment also serves as the UAT environment.

This environment provides the structure and supporting programs for user testing performed throughout the duration of the project. The desired result of the user testing process is functional goal acceptance achieved through managed issue identification, resolution and testing.

MEASUREMENT AND TRACKING

Once corrections have been delivered, your Project Manager and the Tyler Project Managers determine if repeat testing can continue from a stopped point or if it must be restarted.

Tyler requires a final sign-off prior to going live on any module. This sign-off document will outline the status of any remaining open issues related to the module, confirming the issue status and the associated priority code. Your project team and the Tyler project team will review all items and make a decision as to the ability to begin live processing. The sign-off will signify the end of the system test stage for the module. The decision to delay live processing should not be based on issues whose status is a priority 2 or 3, defined as follows:

- Priority 1 Critical Issue: Cannot proceed without correction
- Priority 2 High Issue: Can proceed but needs correction before go-live
- Priority 3 Medium Issue: Can proceed with live processing but fix needs to be delivered to comply with project goals
- Priority 4 Low Priority Issue: Can proceed with go-live, new desired functionality

TESTING CONCLUSION

Clear communication, recordkeeping and analysis by your project team, Tyler Project Manager(s) and Tyler implementation teams are critical in order to move through the testing phase both successfully and in a timely manner. A member of these teams will need to identify the issues and then determine what type of issue resolution is necessary. Most issues can be categorized as they relate to the following:

- Module design or setup
- Best practice re-engineering
- Change in scope
- Software modification requests

Issue tracking, resolution accountability, timely testing and completed issue resolution are absolutely necessary in a successfully completed project. The testing phase is a shared responsibility and must be recognized as such.

TYLER TRAINING PLAN

A key part of any implementation is training users at all levels. Fully trained users understand how to use your new software system to record and report information that helps them to do their jobs better. This is critical to user acceptance of the system and crucial to a successful implementation.

Tyler offers several training formats to accommodate our diverse clients' needs. On-site training by Tyler staff provides hands-on learning in your own labs. Tyler also provides flexible alternatives including remote collaborative training technology, and may offer video and software tutorial media. Regardless of the scope or logistics, your resources receive consultative knowledge transfer sessions that are a combination of lecture and hands-on education, using your data. Tyler requests that managers attend training with their employees. This ensures that the managers can confirm the proper transfer of knowledge has occurred. This also allows employees to ask the manager policy-related questions about how the system will work within their department.

Tyler has developed a dynamic set of training and education resources and services that are tailored to your needs, the Tyler products you are implementing and the scope of your project budget.

TRAINING METHODOLOGY

A mutually developed education plan lays out the process of transferring knowledge between you and Tyler. We refer to our plan as an "education plan" as opposed to a "training plan" for several reasons. First, the process of transferring knowledge is vital to the analysis phase of our project. During analysis we review the current environment, provide Tyler demonstrations, review questionnaires and flow charts, and ultimately arrive at a future state model. The future state model becomes the foundation for user training. Second, training denotes a classroom setting with teacher and pupil. While training will occur, it is only a piece of the overall education needed to be a proficient Tyler user.

The purpose of the education plan is to:

- Communicate the process to stakeholders and functional leaders

- Answer specific questions (where will classrooms be established, what database environment will be utilized, etc.)

- Establish action items and link project personnel as owners

- Define measurement criteria to ensure the plan has been successfully followed

FUNDAMENTALS REVIEW

In this step, your functional leads and power users become familiar with the new Tyler system and its capabilities, language and processes before the start of the current/future state analysis. This allows users on your team to better engage with the Tyler implementation consultants during regular training hours, empowers your staff with experience and a more complete understanding of the system, and provides a strong foundation for ongoing conversations regarding the future state processing. Fundamentals review eases the transition into implementation and training, garnering better results and a greater understanding of new processes.

- Learn general Tyler Technologies terminology

- Experience the basic functionality of your new software solution

- Explore the configuration options including data flow, connectivity, etc.

- Encourage discussions within your organization of desired configuration for design and future processing

- Discover some of the software capabilities available for consideration

- Improve communication between you and Tyler through software knowledge

CONFIGURATION AND POWER USER TRAINING

This stage enables your power users to validate the new software based upon the output from the future state analysis. A high-level exploration of the system results in greater comprehension and retention of system features and functionality. Configuration training may include data conversions validation, configuration validation testing, third-party data exchange validation, forms/reports validation and customization validation.

TRAIN THE TRAINER

Tyler provides training to functional leads and power users throughout the implementation, as the set-up knowledge is key to a self-sufficient user. Tyler provides training to your internal trainers, who in turn train the end user community. End user training is scheduled during the project and is usually done just prior to, or just after, going live. Training materials will be provided and may be customized prior to this training.

- Powers users become immediate stakeholders

- Training between the power users and peers creates a comfortable environment

- Reduced learning times and more flexible training scheduling

TECHNICAL AND SYSTEM ADMINISTRATION TRAINING

Technical training begins at the time of software installation. Tyler's installation team teaches the technical staff how the software is configured within the operating system, as well as basic system maintenance routines such as backups, loading releases, and refreshing training and test databases.

System administration training is conducted after software installation to show users how to update users, permissions, menu security, workflow administration, etc. from within Tyler's software. Your System Administrator necessarily attends these sessions; functional leaders should also attend to have a thorough understanding of the permissions and options available.

END USER TRAINING

After the functional leaders and power users are trained, the system parameters and tables are set up and/or converted, and processes are defined and tested, End users attend applicable scheduled training. Many agencies conduct this training prior to go-live so that these users may assist in system testing and verification, and become familiar with their new processes.

SCHEDULING AND ATTENDANCE

Tyler prefers a classroom and curriculum approach for on-site training to ensure knowledge transfer, comprehension, and retention. A successful user training session is in a classroom environment with a computer for each user (minimum of one computer for every two users, but ideally one per user), a whiteboard, a printer in the room or nearby, and one computer connected to a projector. The size of the class depends on the classroom size and the available computers for training. Ideally, a class size should be limited to twelve (12) users in order to keep the session controlled and ensure that all users are receiving an appropriate level of personalized attention. The specific course topics are discussed and scheduled after analysis, depending on your agency's specific training needs.

Attendance to the training is a critical during implementation. By participating in training courses, your employees gain critical hands-on experience with the system, and learn the Tyler approach. Tyler's training staff will take attendance during classes, and relay that information back to your Project Manager for review. This ensures that users get the complete benefit of training and reduces support incidents after go-live.

RESPONSIBILITIES

Both teams collaborate on all aspects of training which will be discussed and documented during the planning stage of the project. The expectation is for Tyler to provide one occurrence of each scheduled training. You will be responsible for the logistics of the training by completing such tasks as scheduling resources and ensuring facilities are available. These sessions are to be attended by your key staff members so that they can then disseminate the information they learn to others in your organization if or when necessary. Tyler knows the value of being prepared for the use of our software in production, so we contribute to an ongoing education effort by recommending functional

processes to be presented to specific departments, and share training materials used during our sessions. Our goal is to partner with you and lend our expertise and best approaches based on our experiences, in order to allow your resources to be successful at go-live. Changes to these expectations are discussed during project planning, and are based upon your specific business environment and resources.

ADDITIONAL TRAINING RESOURCES

TYLER UNIVERSITY — TYLER U*

Tyler offers training through our Learning Management System — Tyler U — to our client base. Tyler U training provides an excellent opportunity for customers to learn introductory, new, or advanced processes at their own pace.

STATE USER GROUPS

Sound development of the Tyler product is largely driven by existing clients. To that end, we encourage active, client-organized product user groups. User groups typically consist of like-minded customers in geographic proximity of one another and running the same or similar Tyler applications.

ONLINE RESOURCES

Our knowledgebase and website include hundreds of searchable documents, videos and reports for users to view, download and modify. These include how-to documents, user conference session documents, best practices and more.

TYLER CONNECT

Tyler hosts an annual education forum, Tyler Connect, which serves our customers' need for new or refresher information on our software products. Each class is tailored to meet the needs of attendees in order to increase productivity and, ultimately, improve responsiveness to your citizens and clients. Tyler is a nationwide community dedicated to learning, growing, sharing, and connecting every year.

*Not available for all Tyler solutions and products.

PROJECT SCHEDULE

Upon execution of the contract, Tyler and the City will collaborate during the project planning and initiation stage to determine a start date for services to be rendered. Upon initiation of these services, EnerGov shall work with the City to collaboratively define a baseline or preliminary project schedule/plan. Given the fact that project schedules are working documents that change over the course of the project, EnerGov shall work closely with the City to update, monitor, agree, and communicate any required changes to the project schedule.

Tyler has provided a sample project plan here based on the information given within this RFP.

Sample Project Plan (12 Month)

		Task	Duration
1	1-1	Planning & Initiation	4 Weeks
2	2-1	Assess & Define	9 Weeks
	2-2	Data Conversion	3 Weeks
	2-3	Assess Reporting	3 Weeks
3A	3A-1	Config. Busness Stream 1	17 Weeks
	3A-2	Config. Busness Stream 2	17 Weeks
3B	3B-1	Internal Test - Stream 1	2 Wks
	3B-2	Internal Test - Stream 2	2 Wks
3C	3C-1	Custom Report Specs.	2 Wks
	3C-2	Data Mapping	6 Weeks
	3C-3	Integration Definitions	6 Weeks
3D	3D-1	Custom Report Dev.	3 Weeks
	3D-2	Data Conversion Dev.	4 Weeks
	3D-3	Integration Dev.	6 Weeks
4A	4A-1	System Test Training	3 Weeks
4B	4B-1	System Testing - Stream 1	10 Weeks
	4B-2	System Testing - Stream 2	10 Weeks
5	5-1	End User Training	3 Weeks
6	6-1	Final Data Import	2 Wks
	6-2	On-Site Support	2 Wk
		Change Management	

ENERGOV SUPPORT & MAINTENANCE

The goal of the Tyler Support department is to provide expeditious technical assistance to Incode users in overcoming software issues, understanding certain functionality, and recommending approaches to various scenarios. A retention rate of more than 98% suggests we do that very well and, is evidence of our commitment to customer satisfaction.

SUPPORT CHANNELS

Tyler offers <u>Live</u> **telephone support** on our toll-free support hotline (8am – 5pm across four US time zones). For urgent or complex questions, users receive, unlimited telephone software support.

On-line submission (portal) for less urgent and functionality-based questions, users may create unlimited support incidents through the customer relationship management portal available at the Tyler Technologies website.

Our E-mail support allows our clients to ask unlimited detailed questions, attach documents and screenshots, and explain the issues so that our staff can create a resolution efficiently.

Tyler Community – your direct link to thousands of Tyler software users across the country, as well as Tyler personnel in support, implementation, sales, etc.

SUPPORT RESOURCES

A number of additional resources are available to provide a comprehensive and complete support experience:

- Tyler Website – www.tylertech.com – for accessing client tools and other information including support contact information, FAQ, blog posts, maintenance procedures, and much more.

- Tyler Community – available through login, Tyler Community provides a venue for clients to support one another and share best practices and resources, as well as stay up-to-date on product versions and functionality suggestions.

- Knowledgebase – A fully searchable depository of thousands of documents related to procedures, best practices, release information, and job aides.

SUPPORT AVAILABILITY

Tyler Technologies support is available during the local business hours of 8 AM to 5 PM (Monday – Friday) across four US time zones (Pacific, Mountain, Central and Eastern). Clients may receive coverage across these time zones. Tyler's holiday schedule is outlined below. There will be no support coverage on these days.

- New Year's Day

- Memorial Day

- Independence Day

- Labor Day

- Thanksgiving Day
- Day after Thanksgiving
- Christmas Day

ISSUE HANDLING

INCIDENT TRACKING

Every support incident is logged into Tyler's Customer Relationship Management System and given a unique incident number. This system tracks the history of each incident. The incident tracking number is used to track and reference open issues when clients contact support. Clients may track incidents, using the incident number, through the portal at Tyler's website or by calling software support directly.

INCIDENT PRIORITY

Each incident is assigned a priority number, which corresponds to the client's needs and deadlines. The client is responsible for reasonably setting the priority of the incident per the chart below. The goal of this structure is to help the client clearly understand and communicate the importance of the issue and to describe expected responses and resolutions.

Priority 1	**Priority 2**	**Priority 3**	**Priority 4**
CRITICAL Support incident that causes (a) complete application failure or application unavailability; (b) application failure or unavailability in one or more of the client's remote location; or (c) systemic loss of multiple essential system functions.	**HIGH** Support incident that causes (a) repeated, consistent failure of essential functionality affecting more than one user or (b) loss or corruption of data.	**MEDIUM** Priority Level 1 incident with an existing circumvention procedure, or a Priority Level 2 incident that affects only one user or for which there is an existing circumvention procedure.	**NON-CRITICAL** Support incident that causes failure of non-essential functionality or a cosmetic or other issue that does not qualify as any other Priority Level.
Tyler shall provide an initial response to Priority Level 1 incidents within one (1) business hour of receipt of the support incident. Tyler shall use commercially reasonable efforts to resolve such support incidents or provide a circumvention procedure within one (1) business day. Tyler's responsibility for lost or corrupted data is limited to assisting the client in restoring its last available database.	Tyler shall provide an initial response to Priority Level 2 incidents within four (4) business hours of receipt of the support incident. Tyler shall use commercially reasonable efforts to resolve such support incidents or provide a circumvention procedure within ten (10) business days. Tyler's responsibility for loss or corrupted data is limited to assisting the client in restoring its last available database.	Tyler shall provide an initial response to Priority Level 3 incidents within one (1) business day of receipt of the support incident. Tyler shall use commercially reasonable efforts to resolve such support incidents without the need for a circumvention procedure with the next published maintenance update or service pack. Tyler's responsibility for lost or corrupted data is limited to assisting the client in restoring its last available database.	Tyler shall provide an initial response to Priority Level 4 incidents within two (2) business days. Tyler shall use commercially reasonable efforts to resolve such support incidents, as well as cosmetic issues, with a future version release.

(Left margin labels: DESCRIPTION, RESOLUTION TARGETS)

PROBLEM ESCALATION

The goal of the Tyler Support department is to provide technical assistance to Tyler Product users in overcoming issues, understanding certain functionality, and recommending approaches to various situations.

An incident is originated when a customer contacts Tyler's support staff. Support can be contacted via the toll free support line, e-mail, or the support website. The incident can be received in several different ways via our flexible support systems.

If the support incident is received via the toll-free support line, a support representative will create and log the support issue into our help desk system. The support representative will take ownership of the incident and see it to resolution. The support representative will use many different resources to resolve the issue including on-line help, Knowledge Base, advisors, team leaders, managers, and software developers.

If the support incident is received via e-mail or online support portal, an incident is created and a support representative will contact the customer based on a combination of the priority of the issue and the order that the issue was received. The support representative will take ownership of the incident and see it to resolution. The support representative will use many different resources to resolve the issue including on-line help, Knowledge Base, advisors, team leaders, managers, and software developers.

The Team Leaders and Manager of Support Services monitor the status of all support incidents received during the day. In situations where the Team Leaders or Manager identify an incident that needs escalation, the Team Leader or Manager may manually escalate the incident or assign it to a specific support representative. If the software support representative cannot resolve the incident, they have several different levels of help in order to resolve the incident in a timely manner. The levels are as follows: Support Specialist > Advisor > Team Leader > Manager of Support Services > Director of Client Services.

SOFTWARE UPDATES & MAINTENANCE

Tyler has proven history of providing upgrades and enhancement releases on a continual basis, which are available to all clients. Our Evergreen Philosophy ensures that those upgrades and enhancements are provided at no cost to those current with their annual software maintenance contract.

Enhancement releases take place every year and are scheduled with the client to provide the best possible timeframe for both the client and Tyler. Upgrades, however, occur periodically and are initiated by the client at any time via the Internet through a process called Live Update, making the process as convenient as possible for our clients. Patches and fixes are provided to the client through Live Update as well.

With over 800 professionals working with Tyler's software and almost half of those in Development and Implementation, we have successfully migrated many of our customers through three generations of software. Tyler views this software development and migration as a stewardship of your annual maintenance dollars. Those dollars are invested on behalf of our customers into new products and features, continually taking advantage of current technology.

Our evergreen development philosophy has been a strong differentiator that separates us from our competitors and provides a significant cost savings to our family of clients. Through evergreen, our clients receive the latest technology developments, releases and updates without paying additional license fees – for the life of their Tyler product. While this has provided our clients with a return on investment that is

unrivaled in our industry, the frequency and complexity of software releases can sometimes create a "consumption gap" for our clients.

The gap exists when new features are released and, over time, users don't learn and apply these features to their work environments. In these instances, this consumption gap increases, causing the user to fall further and further behind on optimally using the product. Clients facing this situation are no longer benefiting from the full functionality of the product, or from the latest technology enhancements.

EverGuide™ is a Tyler-wide continuous improvement initiative to address these issues. EverGuide is an extension of our evergreen philosophy, and will offer services and consulting to help clients maximize, protect and get the most from their software investment.

- Through our EverGuide initiative, we will:
- Help clients better leverage product enhancements
- Provide a workflow "maturity model" for clients to follow
- Offer strategic planning services and training resources
- Offer a client executive program to help clients build and implement a continuous improvement plan
- Provide domain expertise, with defined integration points and common support methodology

As every Tyler product is different, EverGuide will be customized by product group and client type to ensure we are delivering the right level of services and support to meet the unique needs of our clients.

With EverGuide, our goal is to help our clients continue to grow and evolve their use of the functionality and enhancements of their Tyler product over a long period of time. It's also our hope that this initiative is a catalyst for our clients' organizations to embrace change, commit to training and developing their staff, and fully use the wide ranges of Tyler's service and support offerings available to them.

PRICE PROPOSAL

PRICE PROPOSAL NOTES

The following Price Proposal is based upon the stated requirements provided by the City of Gainesville in this RFP and subsequent addenda. It includes Tyler SaaS fees, professional implementation services, project management, data conversion, integration and travel and expense costs.

Conversion and integration prices are good faith estimates based upon information provided by the City in the RFP and subsequent addenda.

Travel expenses are estimated; however, actual expenses will be billable.

The SaaS fees listed in this Cost Summary do not include any tax or other governmental impositions including, without limitation, sales, use, or excise tax. All applicable sales tax, use tax, or excise tax shall be paid by client and shall be paid over to the proper authorities by client or reimbursed by client to Tyler Technology on demand in the event that Tyler Technology is responsible or demand is made on Tyler Technology for the payment thereof. If tax-exempt, client must provide Tyler Technology with client's tax-exempt number or form.

TYLER SAAS

With the Tyler Software as a Service (SaaS) solution, we will host and manage the EnerGov applications from our facilities. All of your Tyler applications are hosted, maintained, supported and administered on a private cloud by Tyler personnel at our Yarmouth, Maine, or Dallas, Texas, facilities. We manage all regular administrative tasks — including installation, upgrades, support and file maintenance — and ensure all your databases, database servers, operating system, application files and image files are up to date and secure. Users simply access comprehensive Tyler applications and data through a secure Web interface that transmits encrypted data between each client workstation and our dedicated servers. Local governments of all sizes can easily employ this streamlined system, taking advantage of a proven product and doing more with less. No heavy up-front fees, no dedicated IT staff, no maintenance required. It's safe, reliable, affordable and easy to use.

BENEFITS

- **Easy Budgeting**: The subscription is a set fee, flattening the peaks and valleys associated with the acquisition of software and services. Subscribing dramatically lowers initial costs. It provides a consistent quarterly fee that can be easily budgeted for the duration of the agreement.

- **No Secondary Operational Fees**: No additional fees, such as maintenance and support are required

- **Expandable**: Additional Tyler applications are easily added, as needed

FEATURES

The Tyler SaaS model is reliable, available and secure. There are no code changes to the client or server without proper notification. It offers complete redundancy with no single point of failure. In addition, it utilizes data encryption and Virtual Private Networks (VPN) to transmit all data

- **System Administration**: Tyler performs daily administrative tasks. We address the installation, upgrade, support and file maintenance of the Tyler application and database servers, operating system, database and application files.

- **Security Administration**: Tyler provides secure data transmission paths from each client workstation to the Tyler servers. User Ids, passwords and application access rights for the VPN and the Tyler application are administered by Tyler with the client's final approval.

- **Hardware Performance Maintenance**: Tyler supplies and maintains all necessary hardware required to provide workstation access to the Tyler applications at standard industry performance levels. All repairs, upgrades, and replacements to server hardware are the responsibility of Tyler.

- **Disaster Recovery & Fault Tolerance**: Tyler backs up all system & data files and stores them in a secure off-site location. We have fully redundant telecommunications access, electrical power, and required hardware to provide access to the Tyler applications in the event of a disaster or component failure.

![tyler technologies logo]

Sales Quotation For

City of Gainesville
200 E University Ave
Gainesville, FL 32601-3400
Phone +1 (352) 334-5000

Quoted By:	Garth Magness
Date:	1/26/2018
Quote Expiration:	2/17/2018
Quote Name:	City of Gainesville-LGD-EG-PLM
Quote Number:	2017-35333
Quote Description:	EnerGov SaaS

EnerGov SaaS - Silver

Description	Monthly Fee	Users/Units	Annual Fee
Core Software:			
EnerGov Permitting & Land Management Suite (PLM)			
Extensions:			
EnerGov Citizen Self Service - Permitting & Land Mgmt (PLM)			
EnerGov Content Management API			
EnerGov IG Workforce Apps			
EnerGov My GovPay			
EnerGov Permitting & Land Management SDK			
EnerGov Report Toolkit			
EnerGov Request & Enforcement Management SDK			
EnerGov Standard Technical Support			
EnerGov VirtualPay			
Tyler GIS			

EnerGov SaaS - Silver

Description	Monthly Fee	Users/Units	Annual Fee

EnerGov Professional Services

Description	Hours	Unit Price	Extended Price	Year One Maintenance
EnerGov Configuration Services				
EnerGov Data Conversion Services				
EnerGov Dynamic Reports Modifications (10 pack)				
EnerGov Fundamentals Training				
EnerGov Integration Development				
EnerGov Letters and Forms Development (5 pack)				
EnerGov Onsite Training & Production Support Services				
EnerGov Project Management Services				
Onsite End User Training Services				
Onsite Production Support Services				
System Configuration Training				
TOTAL:			**$572,675.00**	**$4,000.00**

Summary

	One Time Fees	Recurring Fees
Total SaaS	$0.00	$167,730.00
Total Tyler Software	$0.00	$0.00
Total Tyler Services	$572,675.00	$4,000.00
Total 3rd Party Hardware, Software and Services	$0.00	$0.00
Summary Total	**$572,675.00**	**$171,730.00**

Summary

	One Time Fees	Recurring Fees
Year One Contract Total	$744,405.00	
Estimated Travel Expenses	$30,600.00	

Optional EnerGov SaaS - Silver

Description	Monthly Fee	Users/Units	Annual Fee
Extensions:			
EnerGov IVR			
TOTAL:			**$17,100.00**

Unless otherwise indicated in the contract or Amendment thereto, pricing for optional items will be held for Six (6) months from the Quote date or the Effective Date of the Contract, whichever is later.

Customer Approval: _____   Date: _____

Print Name: _____   P.O. #: _____

All primary values quoted in US Dollars

Comments

EnerGov monthly fees are rounded, excluding cents.

Shared Services Delivery Model. Configuration services based upon up to 90 workflows (60 unique / 30 derivatives).

Services pricing can be augmented depending upon the city's level of involvement.

ProjectDox has a packaged interface to Tyler's EnerGov system. This requires Tyler's webAPI which has been included in this proposal. The city will need to secure pricing from ProjectDox for their part of the interface as well.

Financial interface assumes web services are available from the city's ERP system.

Inspection routing available in EnerGov assumes the city has licensed ArcGIS network analyst extension.

QUALIFICATIONS

Tyler Technologies, headquartered in Plano, Texas, is a leading provider of end-to-end information management solutions and services for local governments. Tyler partners with clients to empower the public sector — cities, counties, schools and other government entities — to become more efficient, more accessible and more responsive to the needs of citizens. Tyler's client base includes more than 15,000 local government offices in all 50 states, Canada, the Caribbean, the United Kingdom and other international locations. These mission-critical applications provide the public sector with the ability to streamline and automate operations resulting in improved productivity and reduced costs.

ABOUT TYLER TECHNOLOGIES

- Headquartered in Plano, Texas
- Publicly traded on the NYSE under the symbol "TYL"
- 40+ years of industry experience & focus with local government
- Founded in 1966
- 15,000+ clients across every U.S. state, Canada, Puerto Rico and the United Kingdom
- 3,800+ employees
- Annual revenues of $756 million (2016)
- Named one of "America's 200 Best Companies" for four consecutive years by Forbes Magazine
- 27 office locations across the U.S.
- Florida Authentication ID: 400137070014-102008-F05000001163

OUR PRODUCTS

With decades of exclusive public-sector experience, Tyler is the market leader that provides integrated software and services; our singular focus, subject matter experts and in-depth products result in a sustainable client partnership that delivers the industry's most comprehensive solution. We provide the industry's broadest line of software products, and offer clients a single source for all their information technology needs, in several major areas: Financial & Human Resources, K-12 School Solutions, Public Safety, Courts & Justice, Property Appraisal & Tax, Permitting & Land Management, Public Maintenance Management, Citizen Services, Land & Vital Records, and Document Management.

We are known for long-standing client relationships, functional and feature-rich products, and the latest technology. In addition to software products, Tyler provides related professional services including installation, data conversion, consulting, training, customization, support, disaster recovery, and application and data hosting.

Tyler always puts its clients first. We succeed because we take our client's success seriously, and we have a proven record of delivering superior software solutions and services. The overwhelming majority of clients are up and running on time, and within budget. Whether it's developing, enhancing, and implementing our software, or providing excellent service and client support—we succeed because our clients succeed. We want clients for life. In fact, many of Tyler's first clients, across every solution, are still clients today – some with relationships that span decades.

FINANCIAL STABILITY

Tyler consistently maintains a solid balance sheet and strong cash flow and low debt, experiencing consistent revenue growth with 20 consecutive quarters of profitability, and a total revenue for 2016 of $756 million. While experiencing significant growth opportunities from an increase in staff and expanding territories, we anticipate additional product offerings and new technology will accelerate this growth substantially in the future. We believe a debt-free balance sheet, substantial cash reserves, and a committed customer base put Tyler in a great position in our industry to weather any unexpected turbulence in the economy.

2016
2015
2014
2013
2012

$756M
$591M
$493M
$416M
$365M

For additional revenue information please visit www.tylertech.com

Additionally, Tyler has included the 2015 and 2016 Annual reviews in the box with this response document.
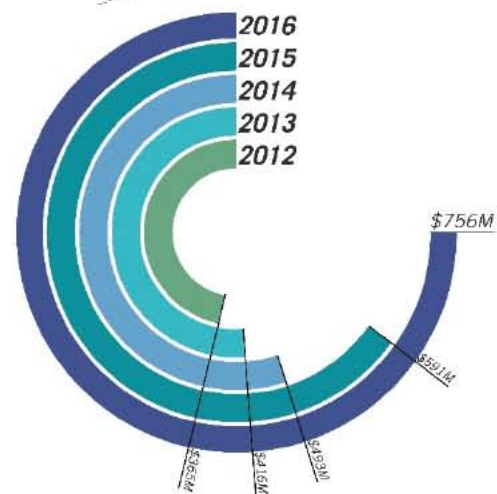
INDUSTRY LEADERSHIP

Tyler strives to provide the best client services in the industry. Our products undergo testing by trained quality assurance and certified usability analysts, therefore our clients benefit from products

that work logically based upon user experience and input. We also focus our implementation and support professionals on specific groups of applications so they can offer more specialized services.

Our commitment at Tyler is to ensure the highest level of client satisfaction through the efforts of Tyler's most valued resource: its people. We challenge our employees to pursue new initiatives aggressively and become industry leaders in their respective fields. Tyler employs over 3,800 individuals, many of whom are seasoned professionals with unique and proprietary skills and years of industry experience. In fact, our employee turnover rate is very low—in recent years, about half of the industry average.

OUR EXPERIENCE

Tyler Technologies' Solutions offer the widest breadth of products in the industry, the latest technology available, and an integrated system that can operate in diverse offices throughout a jurisdiction. More importantly, Tyler's vision and skill in executing that vision is what ultimately leads to a successful implementation and long-term solution for our customers. Our executive team consists of experienced industry leaders that keep our team moving, and making sure we can give you the tools to succeed.

WHAT SETS TYLER APART

There are many key differentiators unique to Tyler and its proposed EnerGov solution that should be viewed as advantageous to the City during the evaluation process.

- First and foremost, all of Tyler's efforts are focused on providing technology solutions to the public sector. Our attention is not diluted by providing solutions to other industries and our staff are industry experts in the public-sector arena.

- Secondly, Tyler has consciously decided to implement its own projects. We do not outsource our implementation efforts to 3rd party integrators like most other companies. We feel this allows us to provide better service to our customers at a much lower cost. Furthermore, due to our expertise in the public sector, we're able to more clearly identify to our customers the best business practices of the public sector. Our approach to implementation will inevitably result in a project with a greater definition of both cost and timeframe.

- Third, Tyler adheres to a philosophy called "Evergreen Development." Under this approach, Tyler will provide all future enhancements including platform changes to EnerGov solution to the City as part of its annual maintenance agreement without additional re-licensing fees. This is a significant divergence from the typical business practices of traditional vendors.

- Fourth, we offer Software as a Service model. While others may offer this service they typically outsource the data center to a 3rd party. Tyler Technologies owns and operates its own datacenters located in Yarmouth, ME and Plano, TX.

- Fifth, if there are modifications to be delivered through the implementation process, it is important to note that these modifications for the City would become part of the generally-

released EnerGov system available to all clients going forward. This allows our clients on annual maintenance to receive additional functionality from new clients as well as our support team does not have to worry that you have modifications when either supporting or upgrading you. Most vendors today still maintain modifications by individual clients which places more stress on their support teams and cost to the client when upgrading.

THE ENERGOV SOLUTION

Managing government processes is a complex and often daunting challenge. From planning, permitting and licensing to asset management and enforcement, you need a solution that preserves informational integrity while efficiently synchronizing field work and in-house operations. Problem solved with Tyler Technologies' EnerGov solution. This industry-leading product is specifically designed to automate and centrally connect critical processes, including land use planning and project review, regulatory management, inspections, code enforcement, asset management, work order management and more. Using mobile-enabled and GIS-based technology, coupled with an intuitive user experience, you can be certain your agency is running efficiently, records are accurate and all work is synchronized from field to desk. Your process is always evolving. With EnerGov you stay in step with the workflow unique to your departments — big or small.

GIS-CENTRIC PROCESSING

As a GIS-infused technology, EnerGov is moving organizations forward by utilizing their spatial data to automate and streamline daily operations. When coupled with spatial analytics, the synergy creates a unique visual experience in data interpretation and business process management. Emerging relationships, patterns and trends allow you to plan and forecast as your agency evolves and real-time route planning gets you from point A to point Z — and all the points in between.

MOBILITY

The groundbreaking EnerGov Mobile App Suite affords you the flexibility and precision needed while on the go. On-site inspections, work orders, environmental and safety issue assessment, full code compliance case management and the plan review process will never be easier than when you deploy iG Inspect, iG Enforce or iG Reviews.

ACCURACY

When budgets are tight and human resources are at a premium, EnerGov helps to unify the multiple layers of information required to sustain permitting, licensing, regulatory processes and communication among employees and constituents. Having one central database allows for efficiency in data entry, interagency involvement and precision in reporting.

STRATEGIC PARTNERSHIPS

PARTNERING WITH MICROSOFT

Tyler enjoys a multifaceted relationship with Microsoft — Microsoft Partner Network, managed partner and member of a strategic development alliance. As a member of the Microsoft Partner Network, Tyler has earned several Microsoft competencies, including several Gold Competencies. A gold competency demonstrates best-in-class expertise and proficiency within Microsoft's marketplace and is evidence of deep, consistent commitment to a Microsoft business

Microsoft Partner
Gold Application Development
Gold Data Platform
Gold Datacenter
Gold Devices and Deployment
Gold Hosting
Gold Midmarket Solution Provider
Silver Application Integration
Silver Enterprise Resource Planning
Microsoft Dynamics AX

solution. Tyler's gold competency also carries the distinction of being among only one percent of Microsoft partners worldwide that have attained this degree of competency.

Tyler is also a Microsoft Independent Software Vendor (ISV) managed partner — less than five percent of all Microsoft partners are managed. This status is awarded by Microsoft to companies who meet a stringent set of requirements. Tyler was also selected as the Public Sector ERP partner of the year in 2011.

In 2007, Tyler and Microsoft announced a strategic alliance to jointly develop core public sector functionality for Microsoft Dynamics AX® to address the unique needs of public sector organizations worldwide.

PARTNERING WITH ESRI

Tyler is an Esri Gold Tier partner, which designates Tyler as an industry leading provider of geospatial solutions and services. As a Gold Tier partner, Esri recognizes Tyler's commitment to providing enhanced technical and sales support, collaborative engagement and a national and multinational focus.

esri Partner Network Gold

Multiple Tyler solutions use Esri technology, including suites in appraisal and tax; planning, permitting and licensing; public safety; and school transportation. Tyler has been an Esri partner for more than a decade.

CLOUD SECURITY ALLIANCE

The Cloud Security Alliance is a not-for-profit organization with a mission to promote the use of best practices for providing security assurance within cloud computing, and to provide education on the uses of cloud computing to help secure all other forms of

CSA cloud security alliance℠
CORPORATE MEMBER

computing. The Cloud Security Alliance is led by a broad coalition of industry practitioners, corporations, associations and other key stakeholders.

INTERNATIONAL ASSOCIATE OF PRIVACY PROFESSIONALS (IAPP)

The International Association of Privacy Professionals (IAPP) is the largest and most comprehensive global information privacy community and resource with more than 20,000 members in 83 countries, helping practitioners develop and advance their careers and organizations manage and protect their data. Founded in 2000, the IAPP is a not-for-profit association that helps define, support and improve the privacy profession globally.

WINNER

★ City of Miami Beach

Coastal City Leverages Technology for Increased Efficiency and Workflow

Two years ago, Miami Beach City Manager Jimmy Morales asked his staff to identify ways to improve the delivery of their services. The staff's assessment unearthed less-than-optimal results: the city's current practices were cumbersome, manual and, in many cases, paper laden.

Additionally, the city used several stand-alone/siloed systems for permitting and other functions, even though none managed more than just one city process. Procedures that should have been integrated were operating in silos, which further restricted the city's ability to conduct timely reviews and implement important checks and balances.

Carmen Sanchez, the deputy director for the City of Miami Beach, said the findings showed that the city had room for improvement.

"All the inefficiencies were resulting in uncollected fees and inconsistent issuance and enforcement of regulations," she said. "Plans and permits were reviewed on paper or on aging software that was at end-of-life and unsupportable."

Organization Profile

- Client Name: City of Miami Beach
- Phone Number: 305.673.7000
- Website: www.miamibeachfl.gov
- City: Miami Beach
- State: Florida
- Number of Employees: 2,000 +
- Population: Approximately 87,000
- Number of years as a Tyler client: 2
- Tyler products/solutions: EnerGov, Tyler Cashiering and Munis

energov™
a tyler planning, regulatory
& maintenance solution

Miami Beach's planning department struggled with unwieldy procedures – they were required to review all applications and revisions on paper. The process generated no less than thousands of documents and more than 2,000 boxes that were permanently housed in a storage facility. Staff had to regularly sift through these paper records to gain access to important information. The paper-focused approach also restricted the department's ability to make edits and revisions on the fly, which resulted in a long, tedious process. It was time for a change.

"We wanted to streamline our daily tasks while also enhancing our customer's online experience," Sanchez said. "In addition to the struggles we faced, our citizens were having to search our webpage for links that provided only limited information. We wanted to enhance our business processes and provide a better experience for our customers."

Integration is Key

After vetting several vendors, Miami Beach selected Tyler Technologies to deliver the technology they needed to get their processes back on track. The city selected Tyler's EnerGov™ software – along with Tyler Cashiering and Tyler's Munis® software – to update their business processes while implementing a system that provided cross-departmental integration and efficiency. Sanchez explained that integration was of the utmost importance to Miami Beach.

"From our perspective, communication is key," she said. "We needed to make sure that everyone could see the same information, which we did not have before. Everyone works different hours, so to be able to have instant access to the information you need 24/7 is very important."

Automating and Streamlining the Review Process

"Throughout the implementation process, our focus did not shift. We stayed on course to deliver the best customer service possible. Because of everyone's efforts, internal and external clients can now benefit from the great new technology," Sanchez said of Miami Beach's implementation of EnerGov.

Through the software, Miami Beach has been able to automate their previously archaic process in planning. Gone are the manual processes of hauling heavy sets of plans to and from various offices. Instead, planning staff can now review and make comments directly on electronic submittals using the EnerGov e-Review feature. Sanchez said the technology has transformed their daily processes.

"We've been able to cut our review time significantly, since we can now request and receive revisions in minutes," she said. "Now, 100 percent of our applications are submitted online and reviewed electronically via e-review."

Sanchez said that the software allows planning staff to communicate quickly and efficiently with architects and engineers alike.

"Planning staff and other disciplines that would not usually review applications but whose input is crucial in some projects, can now conduct concurrent reviews and provide comments to clients expeditiously," she said.

"From our perspective, communication is key. We needed to make sure that everyone could see the same information, which we did not have before. Everyone works different hours, so to be able to have instant access to the information you need 24/7 is very important"

— Carmen Sanchez, Deputy Director, City of Miami Beach, Florida

Connected Processes Yield Increased Insight

Because EnerGov is specifically designed to automate and centrally connect critical processes, Miami Beach employees have greater insight into the progress of planning-specific tasks. This insight allows them to better manage the collection of fees, assess the status of plan and permit cases and keep the process as efficient as possible.

Additionally, improved tracking allows for better projections and statistics that allow Sanchez and her team to strategically allocate their resources.

"We track the number of cases and permits processed, which allows us to determine the levels of staff needed to maintain high customer ratings," Sanchez explained. "This has greatly increased our productivity."

Providing Enhanced Customer Service

In addition to the benefits Sanchez and her team have enjoyed, the city's citizens are also reaping rewards. Miami Beach citizens can now easily access plan, permitting and code compliance cases, apply for business licenses online and research the status of pending applications all from the comfort of their homes (or rather, from the beach).

"The transparency and integration of Tyler software allows us to work as a multidisciplinary team to assist both our internal and external customers," Sanchez said. "It has really helped us fulfill the city's desire to deliver excellent customer service."

A "Greener" Miami Beach

The new processes Sanchez and her team have implemented have also helped the city keep its commitment to green initiatives, which is another way Miami Beach aims to serve its citizens.

"Miami Beach is greatly affected by sea level rise and climate change, so implementing green initiatives that reduce our carbon footprint is very important to our city and its citizens," Sanchez said. "Eliminating the reliance on paper has gone a long way in helping us reach that goal."

So, what became of the 2,000 boxes of files in storage?

"We are happy to announce that we're digitizing the contents, providing access to the information via EnerGov and giving the paper files a destroy date!"

Sanchez explained that the office building she shares with her staff used to contain 15 filing cabinets, all stuffed to the brim with city documents and forms. Thanks to EnerGov, there's nary a filing cabinet to be found.

"We are using the old storage space to create a new conference room, a new area for reception and a flex space that can be used for a lot of different things," Sanchez said. "We have a lot of meetings with architects, developers and engineers, so we're pleased that we can now provide a nice, clean space that is used for something more productive than simply storing paper."

More than Software

Sanchez said her staff is always quick to offer advice to other municipalities that are facing the same issues that plagued Miami Beach before the implementation of EnerGov.

"We have received many calls from other cities regarding our selection of Tyler software," she said. "We systematically tell them that it's not just about the software — Tyler is an excellent provider and enjoys a good reputation in the industry. We tell them all about the Tyler team, their corporate philosophy, our experience with them, their guidance and their good sense of humor.

"We tell them to not be afraid to think beyond the obvious, because software can be used in surprising ways to address problems that are unique to your organization."

Interested in learning more about EnerGov?
Visit us at **www.tylertech.com/energov**, or give us a call: **888.355.1093**.

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Empowering people who serve the public®

energov™

a tyler planning, regulatory & maintenance solution

City of Deer Park, Texas

At a Glance:

Service Area:

- 32,010 citizens

- 16 years as a Tyler client

- Located 20 miles southeast of downtown Houston

Challenges:

- Inefficiency in the field

- Inability to offer online services to customers and business partners

Solution:

- Tyler Technologies' EnerGov™ Solutions

    - Permitting & Land Management

    - Licensing & Regulatory

    - Public Maintenance Management

    - iG Inspect™ mobile app

Results:

- Improved citizen access through Web portals

- Increased mobility and enhanced workflow with EnerGov mobile apps

- Integrated city departments for a more collaborative workforce

- Informed decision-making capabilities with GIS-centric technology

With solutions well-established and in place for court operations, utility, financials and personnel management, the city of Deer Park, Texas, is familiar with leveraging their software to enhance business operations and better serve citizens. Naturally, when city officials discovered a need for more advanced permitting, licensing and maintenance software, they chose a company they knew they could trust – Tyler Technologies.

"We needed to replace our current system with something more comprehensive," said Linda McHone, director of information technology at Deer Park. "We really needed something that allowed us to offer online services and an online portal for our citizens and business partners, and also integrate GIS services from our construction department."

A Tyler client for 16 years, the city turned its focus to EnerGov™ after seeing the product at Tyler's annual user conference, Tyler Connect. Today, the city is addressing their initial needs and more with EnerGov.

Online Services Boost Citizen Engagement and Responsiveness

Located just 20 miles southeast of downtown, Deer Park is a fast-growing suburb of Houston, due in part to a booming petrochemical industry as well as business development along the Houston Ship Channel. With that growth comes an abundance of work for the city's Public Works Department. From residential and commercial building permit applications to inspections, the department found itself conducting a majority of its business in person at Deer Park City Hall. Suffering from long lines and lengthy response times, the city knew there had to be a better way.

Deer Park has transformed the way they handle these requests by utilizing EnerGov to fulfill daily job duties and communicate with citizens and contractors online. With the launch of the city's Citizen Access Portal in October 2014, residents and contractors are now able to apply, pay for and print permits, as well as schedule inspections and print inspection results 24/7/365. This means no more trips down to City Hall, less paperwork for city employees and increased efficiency.

"With online services it's like having City Hall open 24/7," McHone said. "It allows homeowners and business partners to do their business with us when it's convenient for them."

Mobility Increases Productivity from Desk to Field

Deer Park has also found other ways to drive efficiency in their Public Works Department through the use of EnerGov's mobile apps designed to work anytime, anywhere an Internet connection is available.

"The mobility factor of iG™ Inspect and Public Maintenance Management enables our employees to go out in the field and complete their work and receive their work orders

tyler technologies

City of Deer Park, Texas

"A single vendor provides Deer Park continuity in software support operations and seamless integration among primary business applications. We envision bringing all of our city services together with a more collaborative workforce to serve our community."

— Linda McHone, Director of Information Technology

without delay," McHone said. "They don't have to come by the office to pick up their work orders every day or every two or three days. It's immediate. Everything is available right on their iPad® and they're able to complete their work much quicker."

Equipped with the power of GIS technology, Deer Park city inspectors can be routed to their inspection sites, view location-based data, take photos and notes and submit the information in real-time – all without ever leaving the field. McHone explained this immediate communication gives the city office access to the most up-to-date information to run customized reports and greatly improve service delivery.

Comprehensive Approach Drives Accountability

McHone, who has worked for the city of Deer Park for more than 35 years, said EnerGov has also given the city an overall picture of what work is being done and areas in which they can improve.

"With the ability to integrate our GIS services, we can look at a parcel or a property and see everything that goes on with that property from code enforcement to building permits to public maintenance work orders," she said. "EnerGov gives us a history of our assets and how we've been maintaining those assets – what our routine maintenance is, what our emergency maintenance is. This information will help us with budget forecasting and making improvements in the long run."

In the future, McHone said the city of Deer Park hopes to continue utilizing the tools they've gained with Tyler software to efficiently work together and meet the needs of more than 30,000 residents that call the city home.

"A single vendor provides Deer Park continuity in software support operations and seamless integration among primary business applications. We envision bringing all of our city services together with a more collaborative workforce to serve our community."

About Us

Tyler's EnerGov product suite provides planning, regulatory and maintenance software solutions to government entities everywhere. Tyler products empower the public sector to become more efficient, more accessible and more responsive to the needs of citizens.

To learn more about Tyler's best-in-class solutions, email **info@tylertech.com** or call **1.888.355.1093.**

ENGOV-DP-CS-5125-0515

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energov
a tyler planning, permitting & licensing solution

City of Redmond, Washington
Planning for the Future

City of Redmond Leverages EnerGov, Esri® ArcGIS Technology to Protect Water, Streamline Permitting and Land Management, and Create Address Data Repository

Industry: Local Government
Population: 55,000

Years as a Tyler Client: 2
Tyler Products Used: EnerGov

The Facts:

Redmond, Washington is located in the Pacific Northwest/Puget Sound region of the United States. With big skies, beautiful weather and nature to match, outdoor activities and recreational opportunities are the norm. Therefore, it's no mystery that the same industry-forward community that plays host to companies like Microsoft, Honeywell, Nintendo and AT&T would also be environmentally conscious while planning for their future.

Key Challenges

- System outdated with difficulty managing planning, inspecting and permitting processes

- Needed technology platform on which to expand services in future

- Needed more efficient ways to manage permitting, zoning and data integrity in regard to protecting natural resources, maintaining zoning and establishing greater data integrity

Benefits: Planning and Beyond

- Protected drinking water source due to more efficient permitting process using EnerGov's Planning, Permitting and Licensing module integrated with ArcGIS

- More efficient and accurate permitting and zoning processes based on zoning guidelines and integration of EnerGov's GeoRules Agent

- More efficient workflow for field inspectors using mobile devices

- Central commercial/residential address database established based on EnerGov's ArcGIS technology

- Technology platform on which to build future applications

In Their Own Words

"Now when a search is conducted, the system can return information based on a single point or a parcel such as a street. That's the power of ArcGIS. It created address visibility and more accurate permitting."

— *Carole Stewart, Senior Systems Analyst*

Permitting and Protecting Water Resources

The City of Redmond, Washington sits atop an aquifer and has established a Wellhead Protection Zone within the city—land protected in order to provide safe drinking water. With no layer of material to barricade against potentially harmful substances that could filter into the aquifer, and because water sources are so near the surface—sometimes as little as five feet--the City has had to show great caution in permitting new developments that may adversely affect water quality.

Since specialized staff must handle reviews on permit applications pertaining to the aquifer, it is imperative that they only be called on when their services are required. Therefore, the City of Redmond established geographic business rules to be executed within EnerGov using the GeoRule agent to help monitor new permit applications. If applications include elements that compromise the safety of the wellheads or water system, the City is alerted and the permit application is likely rejected. Examples might include

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locations too close to a wellhead, developments involving large quantities of chemicals or objects that require digging like elevator shafts. Using the same technology and techniques, they have also established rules for property development zoning.

Zoning, Inspecting Using the GeoRules Agent

Redmond's Comprehensive Plan Designation is managed similarly to the permitting process. Geographic business rules, based on zoning guidelines, were established based on a master plan detailing what kinds of development projects can be established within certain regions. When permits are filed, the GeoRules agent triggers the acceptance or rejection of permits.

Inspection requests can be received at the city offices via EnerGov's automated telephone system or web-based portal. The 130-150 daily inspection requests remain in a queue until midnight when zoning is properly identified for each inspection and they are automatically assigned to 25 field inspectors based on geographic location and specialty. Each inspector's field assignments and workflow are then immediately established and available on their mobile device the next morning.

Master Address Repository

Redmond's most recent project has been the establishment of their Master Address Repository. Before its development, disparate systems stored their own sets of address information. "Redundancy was a problem. We wanted to consolidate those addresses into one central GIS repository and hook all of our other systems into it," said Carole Stewart, Senior Systems Analyst for the City of Redmond. "It took a huge level of cross-divisional commitment to make it happen." Residential addresses were well established, but commercial addresses were not because they are more fluid. With multiple suites or apartments in residential or commercial developments, a one-to-many relationship exists with address points which makes them more difficult to track.

Taking a creative approach, light-duty fire and police personnel were used by the City of Redmond to walk the streets and gather the address data needed. Once entered, "this allowed us a much greater level of confidence that data was accurate," Stewart commented. "Now when a search is conducted, the system can return information based on a single point or a parcel such as a street. That's the power of ArcGIS. It created address visibility and more accurate permitting." Not only that, but mechanisms are now in place for city staff to report observed problems as they are working around the city, so data quality is always high. The system is also programmed to compensate for discrepancies in information such as missing addresses, errors or land use changes.

Stewart credits Rob Odle, Planning Director and Executive Project Sponsor, for his vision and the successful EnerGov implementation.

"He was supportive from the beginning. He and the mayor were instrumental in replacing our technology. They realized we needed the foundation for future application development."

Going forward, the City of Redmond realizes they are only starting to reap the rewards of efficiency and data efficacy. They knew that the tremendous effort expended up front would be worth it in years to come. Stewart commented, "We spent two years establishing our Master Address Repository. From a technical and strategic perspective, it was one of our most significant accomplishments." That's recognizing a great opportunity, and that's the power of Esri® technology.

MS Dynamics AX Integration

While enjoying EnerGov's efficiencies, their system still continued to collect permit fees which were being spread across disparate general ledger accounts. Needing a way to merge the systems, yet allow accurate and dynamic reporting capabilities, the City of Redmond decided to integrate Microsoft Dynamics AX. With public sector functionality developed jointly by Microsoft and Tyler, Microsoft Dynamics AX coalesced the different systems and Redmond now experiences accurately tracked split funds, supported audits and comprehensive daily reporting. Stewart commented that EnerGov and City staff worked together successfully to help the systems communicate with one another. "It's turned out to be a successful feature of the system."

Why Tyler?

- Tyler has more than 30 years of experience in public sector software and services industry

- Tyler provides all consulting, product enhancement, implementation, training and support services

- Tyler is the largest company solely dedicated to providing software and services to the public sector

Software that thinks like you do.

Tyler Technologies (NYSE: TYL) provides best in class software for schools and local government in all 50 states, Canada, the Caribbean and the United Kingdom.

For more information: 1.800.772.2260; www.tylertech.com or follow us on:

For more information, visit www.tylertech.com

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Four Keys to a Smooth Implementation: Lake Elsinore, California

INDUSTRY INSIGHT

So you've completed countless software demonstrations and procurement processes to select a software solution that will streamline processes, increase efficiency and save your department a bundle of money – great! But before you can start reaping the benefits, you'll need to go about actually implementing the software – a task that be as daunting as selecting the perfect software.

But implementation doesn't have to be intimidating. While your vendor has a lot of responsibility in the success of an implementation project, it also depends greatly on how much effort you put into it. There are several things you can do prior to implementation to help the process go as planned.

The City of Lake Elsinore, California, shared with us their insight into what made their recent software implementation a success. **Here are four key takeaways** from Lake Elsinore's implementation of Tyler's EnerGov™ software that you can apply to ensure a smooth process of your own:

1. Convert Budgeted Dollars to Time, and Spend it Wisely

Lake Elsinore took the money they had budgeted for implementation and – to give them a clear picture of where that money would be spent – changed it to total hours. After that simple transition, the city could easily identify and address which processes were taking up the most time (and money), and could determine the most efficient way to spend it.

After reviewing their findings, it was clear that the majority of the city's budgeted time would be spent on converting data over from their old legacy system. Lake Elsinore instead made the strategic decision to shift focus on getting all of the software features up and running, rather than focusing on converting data that may or may not ever be needed.

Look at it this way: we all have budget constraints. People usually begin the implementation process believing they need all of their old data transferred to the new system. But would you rather pay your implementation team to convert years of old data (which you may or may not ever need), or would you rather have them create tools to make your life easier in the future?

For Lake Elsinore, it was an easy choice. The time-consuming, tedious task of data conversion could be done at a later date by their own staff, if need be – they instead chose to use their hours on advanced configuration. So, instead of ending up with a semi-functional solution full of old data, the end result was a fully functional software system that could immediately start streamlining complex tasks on the go-live date.

Even better: Lake Elsinore had budgeted hours left over after their go-live date, which they plan to use on residual staff training.

2. Consider a Dedicated Project Manager

For many local governments – especially in small cities – it's difficult to find someone with the time and know-how to become an authoritative resource for a specialized project such as the implementation of a new software product.

If you can't dedicate a current staff member to the project, consider contracting a third-party project manager, which is what Lake Elsinore did. One of the first things the city did prior to implementation was hire a third-party project manager dedicated solely to their EnerGov project. This project manager wasn't a "middle man" – he was a fully dedicated resource with the sole focus of making sure the implementation of EnerGov went as planned.

The project manager represented a resource commitment by the city to providing a "power user" who shared the risk and responsibility of the overall project. Because of the hire, Lake Elsinore enjoyed a clearly defined resource available at all times to address questions about the software, its capabilities or the project as a whole.

In fact, the city saw so much value in the performance of their project manager they hired him to stay on full-time after implementation had been completed.

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3. Build Detailed Business Process Workflows

This is an obvious step, but it is so often overlooked. Consider the process of building a house: construction can't start without a detailed blueprint in hand. Lake Elsinore, understanding this, consulted with employees that would touch different parts of the software to ensure every process was mapped out appropriately.

The city built out detailed diagrams that addressed the various business processes for applicable departments. The ability to see how departments affected one another provided an eye-opening benefit that helped employees become fully engaged and invested in the coming change.

Significant testing of these diagrams helped build the foundation for a solid software infrastructure that would serve to enhance the city's processes. Lake Elsinore employees eventually became so invested in the software they were comfortable solving problems and eventually going live without having to consult with Tyler employees.

4. Have Fully Invested Staff

Another step that seems obvious, but it is perhaps the most relevant point for any success or failure of any system deployment. By engaging the key staff from each department from day one, Lake Elsinore was able to impart a sense of ownership that staff were able to grasp and retain long after the system went live. To this day, city staff still feel that sense of ownership, and have strong feelings about what happens to "their" system.

Summary

If there's one lesson to glean from Lake Elsinore's experience, it's that pre-implementation preparation is just as important as the process itself. By taking an active role in preparing for the upcoming transition, your city can equip itself with the tools necessary for a positive implementation process.
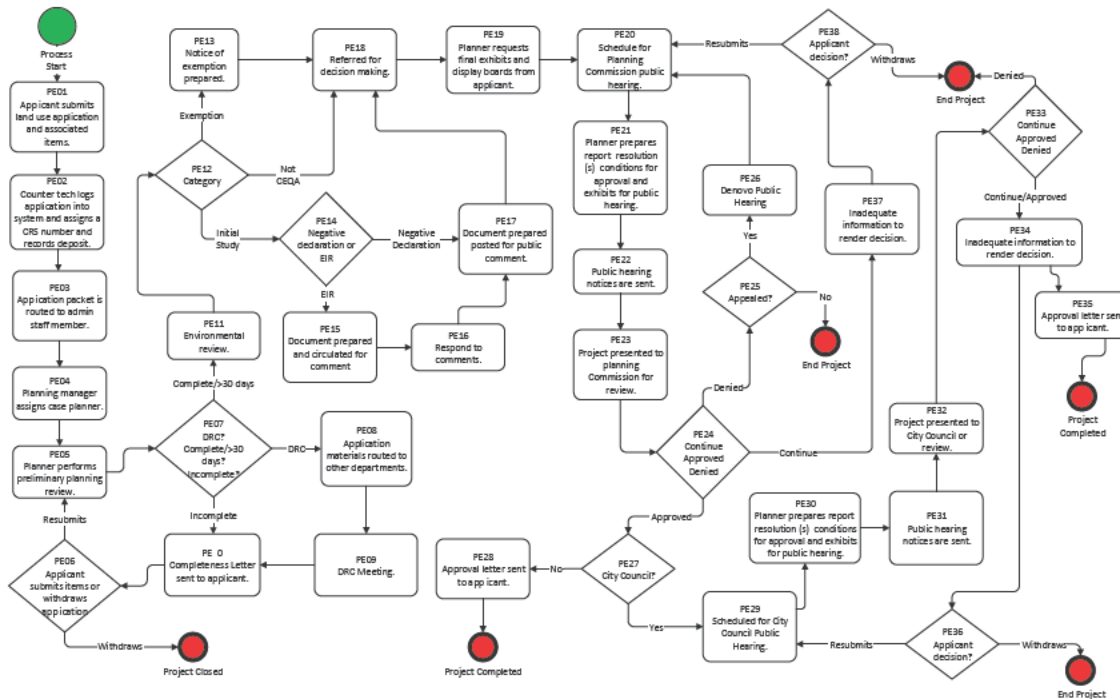
Lake Elsinore diligently mapped out system processes into detailed workflows, like the one pictured here.

Want to learn more about the implementation process for EnerGov? Contact us:

Phone: 888.355.1093

Email: info@tylertech.com

Attachment A
BUSINESS REFERENCES

BIDDER: Tyler Technologies, Inc.

PROJECT: Enterprise Permitting & Land Management Software

BID#:   DODX-180049-GD   **BID DUE DATE:** January 31, 2018

Provide the following business reference information for three clients that a same or similar project has been provided within the past five years. You may include photos or other pertinent information.

#1 Project dates (i.e. 6/2009 to 9/2009):   11/11 – 11/14   Project Amount $ $2,500,000

Project Client Name: Prince William County, VA

Project Location: Prince William County, VA

City, State Zip: 1 County Complex Court, Prince William, VA 22192

Client Contact Name: Ms. Rosa Moran, Systems Developer

Phone Number: 703.792.6987   Fax Number: 703.792.7054

Email Address (if available):   rmoran@pwcgov.org

#2 Project dates (i.e. 6/2009 to 9/2009):   11/14 - 11/15   Project Amount $ $650,000

Project Client Name: Onslow County, NC

Project Location: Onslow County, NC

City, State Zip: 234 NW Corridor Blvd., Jacksonville, NC 28540

Client Contact Name: Ms. Chanda Tobin, Systems Coordinator

Phone Number: 910.989.3083   Fax Number: 910.989.3195

Email Address (if available):   chanda_tobin@anslowcountync.gov

---

#3 Project dates (i.e. 6/2009 to 9/2009): ___04/14 - 12/17___   Project Amount $___$2,500,000___

Project Client Name: ___Los Angeles County, CA___

Project Location: ___Los Angeles County, CA___

City, State Zip: ___320 W Temple Street, Los Angeles, CA 90012___

Client Contact Name: ___Mr. Art Vander Vis, Principal Engineer___

Phone Number: ___626.458.4943___   Fax Number: ___626.458.3180___

Email Address (if available): ___avander@dpw.lacounty.gov___

#4 Project dates (i.e. 6/2009 to 9/2009): ___11/15 - 11/16___   Project Amount $___$1,800,000___

Project Client Name: ___City of Miami Beach, FL___

Project Location: ___City of Miami Beach, FL___

City, State Zip: ___1700 Convention Center Drive, Miami Beach, FL 33139___

Client Contact Name: ___Ms. Carmen Sanchez, Deputy Planning Director___

Phone Number: ___305.673.7000 [x] 6167___   Fax Number: ___305.673.7550___

Email Address (if available): ___carmen.sanchez@miamibeachfl.gov___

#5 Project dates (i.e. 6/2009 to 9/2009): ___02/10 - 02/12___   Project Amount $___$750,000___

Project Client Name: ___City of Savannah, GA___

Project Location: ___City of Savannah, GA___

City, State Zip: ___2 East Bay St., Savannah, GA 31401___

Client Contact Name: ___Mr. Alvin McGrath, Permit Services Coordinator___

Phone Number: ___912.651.6510 [x] 1877___   Fax Number: ___912.651.6756___

Email Address (if available): ___amcgrath@savannahga.gov___

EXCEPTIONS TO RFP

Tyler Statement Regarding Exceptions to the City of Gainesville's RFP for Enterprise Permitting & Land Management Software

Tyler has included Sample Terms and Conditions on the USB Drive along with this response for the City's review.

Tyler's Proposal is based on the delivery of the requested software and services according to Tyler's standard implementation methodology and Tyler's standard contract(s). That methodology, and that contract(s), have been refined and enhanced over Tyler's many years of operation in the public sector information technology market. *Tyler's submission of its Proposal does not constitute a waiver of Tyler's right to negotiate any and all terms to the mutual satisfaction of the parties.*

Tyler will consider its implementation methodology and its contract(s) to be the starting point for those negotiations unless expressly stated otherwise in its Proposal. Tyler's standard contract(s) are included for your reference. Because it is impossible to negotiate in a vacuum, Tyler reserves the right to review and discuss in good faith at the time of contract negotiations any customer specific sample contract and/or contract terms included in the Request for Proposal. To the extent you request to incorporate your bid documents and our proposal documents into the contract package, we will agree to do so as long as the order of priority is (a) the final, negotiated contract; (b) our proposal documentation; and (c) your bid documentation.

Tyler does not agree to work for hire provisions. We retain all intellectual property and confidentiality rights in and to our proprietary and/or confidential information and deliverables.

Tyler is providing the following representative "exceptions" to standard procurement terms and conditions for your review. This representative list does not negate any of the expectations Tyler has stated above:

- Insurance: Tyler has provided its Evidence of Insurance certificate. Tyler's insurance program is established at a corporate level and is not subject to change on an individual customer basis. We agree to secure our insurance from a carrier with a minimum AM Best rating of A-:VII. Tyler's insurer evidences Tyler's insurance coverage using a standard Acord form. The coverage limits set forth on our certificate of insurance do not apply separately. Certificates of insurance listing the customer as certificate holder are available upon request after a contract is signed. At your request during contract negotiations, we will add language to the insurance provision that adds you as an additional insured to our commercial general liability and auto liability policy for claims arising out of or relating to the contract, which automatically affords you the same status under our excess/umbrella liability policy. A Certificate of Insurance reflecting that status may be provided at your request after the contract is executed. Our carrier has issued blanket endorsements regarding additional insured status; we do not issue separate endorsements specific to each customer. If you require it in the contract, we will agree to provide you with notice of cancellation, non-

renewal or reduction in our insurance coverages below the minimum requirements set forth in the contract within thirty (30) days thereof. Renewal certificates of insurance will be provided as close as practicable to the date the applicable policy or policies is/are renewed.

- **Compliance with Laws**: We agree to comply with applicable laws and mutually agreed to customer protocols. The quoted fees are based, in part, on the cost of compliance with applicable laws existing as of the time of the quote. Should laws applicable to Tyler's performance under the agreement change post-signature, Tyler reserves the right to seek a change order for the additional work, time and/or cost that may be required to comply with the new law, ordinance or regulation. We reserve the right to discuss in good faith which laws you consider applicable, and to identify those in the contract.

- **Public Disclosure**: We reserve the right to protest the public disclosure of our confidential business information/trade secrets but will comply with applicable public records laws.

- **Pricing**: Unless expressly indicated otherwise, our Proposal contains estimates of the amount of services and associated expenses needed, based on our understanding of the size and scope of your project. The actual amount of services and expenses depends on such factors as your level of involvement in the project and the speed of knowledge transfer. If required, we will provide a not-to-exceed quote once the scope of services has been finalized. Unless noted otherwise, our services rates do not include travel expenses, which are separately estimated. Unless expressly indicated otherwise, the fees we have quoted also do not include any taxes.

- **Indemnification**: Tyler shall indemnify, defend and hold harmless its customers from and against any and all direct claims, losses, liabilities, damages, costs and expenses (including reasonable attorney's fees and costs) for personal injury or property damage arising from Tyler's negligence or willful misconduct; or Tyler's violation of a law applicable to our performance under its agreement with such customer. The customer must notify Tyler promptly in writing of the claim and give us sole control over its defense or settlement. The customer also agrees to provide Tyler with reasonable assistance, cooperation, and information in defending the claim at our expense.

- **Termination**: Tyler's standard practice is not to include a termination for convenience provision in its contracts, given the significant investments made by both parties to the procurement and implementation. The customer may terminate its contract with Tyler for cause in the event Tyler fails to cure a material breach within thirty days of the customer's invocation of dispute resolution. In the event of such termination, the customer will make payment to Tyler for all undisputed products, services and expenses delivered or incurred through the effective date of termination. Payment for disputed products, services and expenses, and the customer's remedies, will be determined through the mutually agreed

dispute resolution process. If the customer should not appropriate or otherwise make available funds sufficient to purchase, lease, operate or maintain the products set forth in the contract, or other means of performing the same functions of such products, the customer may unilaterally terminate its contract with Tyler upon thirty days' prior written notice to Tyler. Upon termination for non-appropriation, the customer shall remit payment for all products and services delivered to the customer and all expenses incurred by Tyler prior to Tyler's receipt of the termination notice. The customer will not be entitled to a refund or offset of previously paid license and other fees.

- Term: For an on premise solution, the contract between the customer and Tyler shall not have a defined term. Tyler does provide maintenance and support services on an annual basis, as set forth in its Maintenance and Support Agreement (Exhibit C to the standard Tyler contract). For a SaaS contract, the term of the contract shall be the agreed upon SaaS term which may renew automatically thereafter on a year-to-year basis, or such other renewal term as the parties may agree.

CITY OF GAINESVILLE

CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for
Providing Enterprise Permitting and Land Management Software a living wage of $11.8269per hour to covered employees who receive Health Benefits from the undersigned employer and $13.08 per hour to covered employees not offered health care benefits by the undersigned employer.

Name of Service Contractor/Subcontractor: Tyler Technologies, Inc.

    Address: 2160 Satellite Blvd., Duluth, GA 30097

    Phone Number: 888.355.1093

Name of Local Contact Person Garth Magness

    Address: 2160 Satellite Blvd., Duluth, GA 30097

    Phone Number: 888.355.1093

Signature: _Dane Womble (signature)_ Date: 1/25/2018

Printed Name: Dane Womble

Title: President - LGD

LIVING WAGE DECISION TREE

While not all encompassing, the following is provided as a guideline for contractors in determining whether the City of Gainesville Living Wage Ordinance applies to their firm in the performance of specified service contracts for covered services* with the City. Contractors are advised to review the entire text of the Living Wage Ordinance in conjunction with this guideline.

```
┌──────────────────┐   NO    ┌──────────────────┐
│ Will contract for │ ──────→ │ LWO Not          │
│ services exceed   │         │ Applicable       │
│ $100,000?**       │         └──────────────────┘
└──────────────────┘
         │ YES
         ↓
┌──────────────────┐   NO    ┌──────────────────┐
│ Is service        │ ──────→ │ LWO not          │
│ provided one of   │         │ applicable       │
│ the covered       │         └──────────────────┘
│ services listed at │
│ bottom of page?   │
└──────────────────┘
         │ YES
         ↓
┌──────────────────┐   NO    ┌──────────────────┐
│ Is company a      │ ──────→ │ LWO not          │
│ for profit        │         │ applicable       │
│ business (i.e.    │         └──────────────────┘
│ not a 501 (c) or  │
│ related type?     │
└──────────────────┘
         │ YES
         ↓
┌──────────────────┐   NO    ┌────────────────────┐   NO    ┌──────────────────┐  YES   ┌────────────┐
│ Is company        │ ──────→ │ Are services       │ ──────→ │ Does company      │ ─────→ │ LW applies │
│ located in City   │         │ being secured as   │         │ employ 50 or      │        └────────────┘
│ of Gainesville    │         │ a part of a co-op  │         │ more persons?     │
│ Enterprise Zone?  │         │ purchasing bid?    │         └──────────────────┘
└──────────────────┘         └────────────────────┘              │ NO
         │ YES                        │ YES                       ↓
         ↓                            ↓                  ┌──────────────────┐
┌──────────────────┐         ┌──────────────────┐        │ LWO not          │
│ LWO not          │         │ LWO not          │        │ applicable       │
│ applicable       │         │ applicable       │        └──────────────────┘
└──────────────────┘         └──────────────────┘
```

*Covered Services: food preparation and/or distribution; custodial/cleaning; refuse removal; maintenance and repair; recycling; parking services; painting/refinishing; printing and reproduction services; landscaping/grounds maintenance; agricultural/forestry services; and construction services
****Total value of contract.

LIVING WAGE COMPLIANCE
See Living Wage Decision Tree (Exhibit C hereto)

Check one:

☐ Living Wage Ordinance does not apply
(check all that apply)
　　☐ Not a covered service
　　☐ Contract does not exceed $100,000
　　☐ Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
　　☐ Located within the City of Gainesville enterprise zone.

☒ Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

PROPOSAL RESPONSE FORM – SIGNATURE PAGE
(submit this form with your proposal)

TO: City of Gainesville, Florida
               200 East University Avenue
               Gainesville, Florida 32601

PROJECT: Enterprise Permitting & Land Management Software

RFP/RFQ#: DODX-180049-GD

RFP/RFQ DUE DATE: January 31, 2018

Proposer's Legal Name: Tyler Technologies, Inc.

Proposer's Alias/DBA:

Proposer's Address: 2160 Satellite Blvd., Duluth, GA 30097

PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)

     Name: Garth Magness   Telephone Number 888.355.1093

     Date: 1/26/2018   Fax Number 678.474.1002

                                  Email address garth.magness@tylertech.com

ADDENDA

The Proposer hereby acknowledges receipt of Addenda No.'s   1 , 2 , 3 , 4 to these Specifications.

TAXES

The Proposer agrees that any applicable Federal, State and Local sales and use taxes, which are to be paid by City of Gainesville, are included in the stated bid prices. Since often the City of Gainesville is exempt from taxes for equipment, materials and services, it is the responsibility of the Contractor to determine whether sales taxes are applicable. The Contractor is liable for any applicable taxes which are not included in the stated bid prices.

LOCAL PREFERENCE (check one)

Local Preference requested: ☐ YES   ☒ NO

A copy of your Business tax receipt and Zoning Compliance Permit should be submitted with your bid if a local preference is requested.

QUALIFIED LOCAL SMALL AND/OR DISABLED VETERAN BUSINESS STATUS (check one)

Is your business qualified as a Local Small Business in accordance with the City of Gainesville Small Business Procurement Program? (Refer to Definitions)   ☐ YES   ☒ NO

Is your business qualified as a Local Service-Disabled Veteran Business in accordance with the City of Gainesville Small and Service-Disabled Veteran Business Procurement Program? (Refer to Definitions)

☐ YES   ☒ No

SERVICE-DISABLED VETERANS' BUSINESS (check one)

Is your business certified as a service-disabled veterans' business?   ☐ YES   ☒ NO

LIVING WAGE COMPLIANCE

See Living Wage Decision Tree (Exhibit C hereto)

Check One:

☐   Living Wage Ordinance does not apply
              (check all that apply)
              ☐ Not a covered service
              ☐ Contract does not exceed $100,000
              ☐ Not a for-profit individual, business entity, corporation, partnership, limited liability
                  company, joint venture, or similar business, who or which employees 50 or more persons,
                  but not including employees of any subsidiaries, affiliates or parent businesses.
              ☐ Located within the City of Gainesville enterprise zone.

☒   Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is
              included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

SIGNATURE ACKNOWLEDGES THAT: (check one)

☐   Proposal is in full compliance with the Specifications.

☒   Proposal is in full compliance with specifications except as specifically stated and attached hereto.

Signature also acknowledges that Proposer has read the current City of Gainesville Debarment/Suspension/Termination Procedures and agrees that the provisions thereof shall apply to this RFP.

ATTEST:

(CORPORATE SEAL)
PROPOSER:

Kristie Boydstun
Signature
By: Kirstie Boydstun

Dane Womble
Signature
By: Dane Womble

Title: RFP Manager

Title: President LGD

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ADDENDUM NO. 4

Date: January 26, 2018   Bid Date: January 31, 2018
                                                                                                 at 3:00 P.M. (Local Time)

Bid Name: Enterprise Permitting & Land Management Software   Bid No.:   DODX-180049-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1. Please find attached:

   a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.
   b) A copy of Attachment A

The following are answers/clarifications to questions received after the non-mandatory pre-bid conference.

1. Question: On the RFP, section II, subheading B (Minimum Requirements [page 9]), bullet point 4A states "…and links with voice recognition for phone requests for inspections". Later in the same section (page 10, Section 4 [Integrated], bullet A), "telephone voice recognition software" is listed as a desired integration feature. However, on Addendum 2, question 13 you state that the department is not currently using IVR. Is the intent of the RFP to include IVR in the quote and as part of the solution? If not, please explain or expand on the RFP wording for bullet 4A on page 9.

   Answer: We would like the system to be compatible with two-way integration to a voice recognition software, but it could end up being a third party provider of the IVR software. It would be ideal if the solution included IVR, but it's only mandatory that there would be compatibility.

2. Question: For data conversions, the RFP lists 3 data sources (Innoprise, BDS, and eWacker). For each data source, please provide the following:
   • Approximately how many records will be converted from each system? This information is unknown, best guess is between 6-8000 records per year from 1987 to present.

   • How many tables in each data source will be used for the conversion effort? This information is unknown

   • Approximately how many fields will be brought over in the conversion from each system? This information is unknown.

- What database engine is each data source using? <u>BDS is using DOS, E-Wacker uses Foxpro, and Innoprise is using Windows</u>
- How will the proposing vendor access the data (data dump, VPN, etc.) for conversion? <u>This information is unknown</u>
- Does the City have a data source expert (or support personnel), or will the proposing vendor have to work with the OEM? <u>Not at this time. OEM is not available. We do have config manuals for both older systems. Innoprise is still in existence for subject matter.</u>

Answer: See responses underlined and in red above

3. Question: How many reports is your system currently providing? How many reports are to be re-created in the proposed system?

Answer: There are 100 reports, however not all reports are active. We would like a report generator that can be configured by staff, access the database and develop the reports based on the needs of the department.

4. Question: How many reports, if any, should be printable from the field?

Answer: Inspector routes, daily workload and inspection reports with a few additional reports to be determined during project discovery.

5. Question: Of the 41 permit types listed for Planning, how many different business processes do these permits follow? Does each have a unique process, or do several permit types have the same process steps?

Answer: ProjectDox has consolidated many of our *review* processes but in terms of business processes the answer is more nuanced. Many of our permits have unique business processes (i.e. page 2 and 3 of the fee schedule) but the majority of our work begins in a similar fashion but then follows more unique paths as each project moves through the workflow. So, some of our permit processes may have the same Steps 1, 2, 3, but different Steps 4 and 5.

6. Question: Of the 141 permit types listed for Building, how many different business processes do these permits follow? Does each have a unique process, or do several permit types have the same process steps?

Answer: There are several permits that may have the same business processes, however there are many different processes for each permit type.

7. Question: The RFP lists the Planning and Building record/permit types. Please provide a list of the Code Enforcement record types used by the City and indicate if any are planned for sunset.

Answer:

There are approximately 90 code enforcement record types being used in Innoprise. At this point, there has not been any discussion about sunsetting any of these code enforcement permits. Please see specific permit types provided by the Code Enforcement Division below:

<u>Notice of Violation</u>
Notice of Violation – Building Regulations

<u>Special Magistrate Hearing Forms</u>
Case Continuance Request
Case Drop Request
Request for Hearing
Affidavit of Hand Delivery – Notice of Violation – no Special Magistrate Hearing
Affidavit of Post – City Hall – Notice of Violation
Affidavit of Hand Delivery
Affidavit of Post Property and City Hall
Affidavit of Compliance
Affidavit of Non-Compliance
Case Continuance
Drop Case

Certificate of Abatement

<u>Chapter 13</u>
Courtesy notice of overgrowth
Notice of Violation
Notice of Repeat Violation

<u>Chapter 23</u>
Courtesy Notice – Newspaper, Magazine, or Periodical Box in Right-of-Way
Notice of Violation
Notice of Repeat Violation

<u>Chapter 26</u>
Notice of Violation
Notice of Repeat Violation

<u>Chapter 27</u>
Notice of Violation

<u>Chapter 30</u>
Intent to Inspect – Over Occupancy
Notice of Violation – Land Development Code
Courtesy Warning – Prohibited Signs
Notice of Repeat Violation – Land Development Code

<u>Commercial Building Code</u>

Notice of Violation

Dangerous Building -16-19
Notice of Violation – Dangerous Building and/or Hazardous Land
Affidavit of Posting – Demolition Order
Notice of Violation – Dangerous Building/Hazardous Land - Demo
Notice of Violation – Hazardous Land

Driveway Documents
Driveway Implementation approval
Driveway Implementation disapproval
Driveway Implementation
Driveway Maintenance Courtesy Letter
Non-conforming Off Street Parking Plan Request
Off Street Parking Plan Request

Extension of Time Request Form

Service of Process
Gainesville Police Department Service of Process
Sheriff's Service of Process

Home Occupation
Home Occupation Permit
Home Occupation Permit Inspection Report
Home Occupation Permit Renewal Letter

Landlord Documents
Affidavit of Post – Notice of Violation
Affidavit of Post - SM Hearing – LLP
Affidavit of Compliance – SM Hearing
Affidavit of Non-Compliance – SM Hearing
Case Continuance Request – SM Hearing
Drop Request – SM Hearing
Request for Hearing
Notice of Violation

Public Records Request Letter

Special Event Permit
Special Event Receipt

UF Special Event Parking Permit
UF Special Event Parking Permit Receipt

Vision Triangle
Notice of Violation – Vision Triangle

Special Magistrate Letters and Legal Documents
Findings of Fact, Conclusions of Law and Order, Order Imposing Fine and Costs
Authorized Enforcement - Lien for Yard Maintenance Chronology
Partial release of Lien
Compliance Letter – Fine Owed
Compliance Letter – Cost Only Owed
Compliance Letter – No Fines or Costs
Cover Letter
Dismissal Letter
Landlord Permit Cycle Ended Compliance Letter – Fee Owned
Non-Compliance Letter – Ownership Change
Non-Compliance Letter - Fines
Non-Compliance Letter - Property has fines
Notice of Intent to Sue
Order of Dismissal
Order to Continue
Reduction/Rescission Request Form
Reduction/Rescission Receipt Letter
Reduction/Rescission Chronology
Release of Lien
Release of Lien Letter
Repeat Violator Letter
Non-Compliance Letter
Non-Compliance Letter – Yard Maintenance
Notice of Hearing and Letter
Lien Filed Letter – Yard Maintenance
Lien Letter Filed

8. Question: Of the Code Enforcement record types, how many business processes do these records follow? Does each have a unique process, or do several record types have the same process steps?

    Answer: Code Enforcement generally follows two business processes: enforcement and permitting. The enforcement process can be somewhat complicated depending on the issue type, steps needed to resolve, and issues specific to each case. These variables determine the records used and the overall number of steps involved. The Codes permitting process is fairly simple and includes application submission, a multi department review and the issuing of the permit.

9. Question: Page 17 of the RFP refers to Attachment A for References however there is no attachment A included. Can this be sent to us?

    Answer: The form is attached to this Addendum #4

10. Question: Has the City of Gainesville met with other vendors to provide the services they are looking for?

Answer: Aside from demos, the City of Gainesville has not met with any other vendors to discuss services.

11. Question: Who were the team members that put this RFP together (roles)?

    Answer: Senior Buyer, Strategic Planning Manager, Planning Technician, Building Official, Director of the Department of Doing, IT Project Manager, Customer Support Specialist, Code Enforcement Manger, & Fire Protection Specialist.

12. Question: Who will be on the reviewing team for this proposal – which department heads?

    Answer: IT Project Manager, Director of the Department of Doing, Strategic Planning Manager, Director of Citizen-Centered Gainesville

13. Question: What is the duration of the project?

    Answer: We anticipate +/-18 months.

14. Question: What is the format of data in BDS, eWacker and Innoprise that needs to be migrated to the new system?

    Answer: We are unsure of what you are looking for in this question, but we've provided screenshots of permits and interfaces from each of the three legacy systems.

15. Question: Can City please share more details on the use of BDS and eWacker?

    Answer: Currently these legacy systems are used to identify permits and plans associated with a given project. The information is used to respond to public records requests, which could include everything from owner to contractor to permit dates, dates of actions on the permit, types of inspections, results of inspections, name of inspectors. Contractor records to include license information and insurance documentation. Attachments which include the whole array of documents used in permitting and inspection.

16. Question: What is the total number of permits that the City of Gainesville wants to be migrated and incorporated in its future solution?
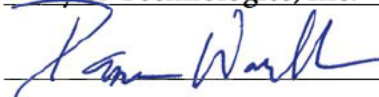
    Answer: Approximately 248,000

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 4 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 4 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: _____Tyler Technologies, Inc._____

BY: _____ Dane Womble - President LGD

DATE: _____1/26/2018_____

CITY OF   FINANCIAL SERVICES
GAINESVILLE   PROCEDURES MANUAL

41-424   **Prohibition of lobbying in procurement matters**

Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

Attachment A
BUSINESS REFERENCES

BIDDER: _____

PROJECT: Enterprise Permitting & Land Management Software

BID#:   DODX-180049-GD   **BID DUE DATE:** January 31, 2018

Provide the following business reference information for three clients that a same or similar project has been provided within the past five years. You may include photos or other pertinent information.

#1 Project dates (i.e. 6/2009 to 9/2009): _____   Project Amount $_____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____   Fax Number: _____

Email Address (if available):   _____

#2 Project dates (i.e. 6/2009 to 9/2009): _____   Project Amount $_____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____   Fax Number: _____

Email Address (if available):   _____

#3 Project dates (i.e. 6/2009 to 9/2009): _____   Project Amount $_____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____   Fax Number: _____

Email Address (if available): _____

#4 Project dates (i.e. 6/2009 to 9/2009): _____   Project Amount $_____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____   Fax Number: _____

Email Address (if available): _____

#5 Project dates (i.e. 6/2009 to 9/2009): _____   Project Amount $_____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____   Fax Number: _____

Email Address (if available): _____

ADDENDUM NO. 3

CITY OF
GAINESVILLE
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FLORIDA

Date: January 22, 2018   Bid Date: January 31, 2018
                                                       at 3:00 P.M. (Local Time)

Bid Name: Enterprise Permitting & Land Management Software   Bid No.:   DODX-180049-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1. Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 3:00 p.m. (local time), January 24, 2018. Questions may be submitted as follows:

   Email: dykemangb@cityofgainesville.org
   or
   Faxed (352) 334-3163
   Attention: Gayle Dykeman

2. Please find attached:

   a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.
   b) Copy of the Pre-bid sign-in sheet for your information
   c) Software and Data Examples

3. Gayle Dykeman, Procurement Division, discussed bid requirements.

   a. Sign-in Sheet is circulating.
   b. Questions/Answers and topics of discussion addressed at the pre-bid will be available through DemandStar.
   c. Any questions after the meeting must be put in writing to Gayle Dykeman, dykemangb@cityofgainesville.org by 3:00pm, January 24, 2018.
   d. Bids are to be received by the Purchasing office no later than 3:00 p.m. on January 31, 2018. Any bids received after 3:00 p.m. on that date will not be accepted.
   e. All communication through Gayle Dykeman only. Do not communicate with other City staff.
   f. Various forms (i.e. Tabulation of Subcontractor and Material Suppliers) are to be completed and returned with your bid.
      i. Sign, date and return all Addenda.

4.   Lila Stewart, Department of Doing, introduced other staff members in the room, Wendy Thomas and Andres Lazo and briefly discussed the overall scope of the project, emphasizing a Citizen Centered solution.

5.   Wendy Thomas contributed a final comment that the Department of Doing does not want to purchase software that doesn't meet the needs of the citizens. This is a citizen centric endeavor.

The following are answers/clarifications to questions received at the non-mandatory pre-bid conference.

6. Question: Can you provide a list of reports that are needed?
    Answer: We are looking for a dashboard, listing performance data, including, but not limited to: inspections by employee, status reports for review times, revenue reports and additional metrics.

7. Question: BTA – Still run out of finance?
    Answer: Yes.

8. Question: What type of support team will be provided by the
    Answer: There is a core team of 3 that put together the RFP and will be participating in implementation, but we also hope to hire support staff dedicated to the project.

9. Question: January next year is 'go live'. What is driving that date?
    Answer: We're spending many man hours to meet the demand for service. Using outmoded programs, we're planning to do something that should have been done years ago.

10. Question: What is the existing system?
    Answer: Innoprise

11. Question: Will Innoprise migrate to the new system?
    Answer: Yes

12. Question: What is the number of users?
    Answer: Department – 50, Code Enforcement 30; Code Enforcement is a separate department from Department of Doing

13. Question: How many other systems do you want to integrate with?
    Answer: ARC GIS Servers, Spatial Boundary, Project Dox (2-way) (latest version); City ERP system, See Click Fix, Financial Management System – CGI Advantage

14. Question: IVR System?
    Answer: We are interested in learning more about it.

15. Question: Are you seeking SaaS solutions only?
    Answer: Software/Server support currently provided by local utility with robust use requirements. Open to recommendations.

16. Question: Can you provide Management roles?
    Answer: System Administrators, Project Coordinators, Intake, Reviewers

17. Question: Have you polled citizens to understand what they think is intuitive?
    Answer: No, not yet.

18. Question: Can you provide demographics?
    Answer: Building contractors typically older male, not technology savvy. Planning and Code enforcement has people throughout the entire community; suggest vendors take a look at the community demographic for more information

19. Question: Mobile Enabled – end to end mobile device – native apps?
    Answer: City wants flexibility to remote access data from an inspection site.

20. Question: Do you have data specific to what you want on mobile?
    Answer: Should be able to work remotely, provide inspection reporting, input by staff should have the same look and feel as the citizen solution

21. Question: SaaS – do you want to have your own Amazon account or have it provide by vendor?
    Answer: We are open to suggestions

22. Question: Can you provide some sample sets of legacy data?
    Answer: Please see attachments.

23. Question: BDS, eWacker and Innoprise are all to be converted?
    Answer: Yes

24. Question: Code Enforcement – when will they know if that are going to be a part of the project?
    Answer: They are currently part of the process.

25. Question: Is there a specific requirements matrix vendors are to compete as part of this RFP?
    Answer: No

26. Question: Has a centralized document management system been identified? Will you know by the close of the RFP?
    Answer: Not yet identified and unlikely to be by the close of the RFP.

27. Question: For online payments what payment processor is preferred?
    Answer: The Budget & Finance Department has selected JetPay.

28. Question: Are you trying to reduce the permit type by 50% or enable logic to reduce processing volume?
    Answer: We wish to adjust and simplify, make it easier to use

29. Question: What percent of multiple permits are being filled out and submitted
    Answer: Not very many, most are contractors, we'd like to implement an autofill system.

30. Question: How do you certify a contractor for permit licensure from other sources?
    Answer: Some fields are flagged.

31. Question: Is the City looking for IVR?
    Answer: Yes

32. Question: Do you require a local business license?
    Answer: Not now, but perhaps in the future

33. Question: If there is not a corporate seal, does the submission need to be notarized?
    Answer: Yes

34. Question: Upgraded ProjectDox?
    Answer: The City is currently using ProjectDox, Version 8.6

35. Question: How many estimated unique external users do you anticipate?
    Answer: Unlimited, certainly in the thousands.

36. Question: What is your definition of IVR?
    Answer: Interactive voice program that allows people to request inspections or information via telephone

37. Question: Is there a plan to integrate with GRU or City works outside of the Department of Doing?
    Answer: CRA and GRU use ProjectDoxs – it is easier to integrate than make one system work for all

38. Question: Is Code Enforcement doing code enforcement on rental housing?
    Answer: Landlords are required to get a rental permit

39. Question: Can the City please share the funding or budget amount that has been approved for this project?
    Answer: Vendors are expected to price according to their best pricing model.

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 3 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 3 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Tyler Technologies, Inc.

BY: Dane Womble

DATE: 1/22/2018

CITY OF   FINANCIAL SERVICES
GAINESVILLE   PROCEDURES MANUAL

41-424   **Prohibition of lobbying in procurement matters**

        Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

        Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

        Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

Innoprise Software
Community Development

System Functions
Jump To....

the City of
GAINESVILLE
official website

Permit Input
BP-17-01002 : New Residential Dwelling
08241 NW 54TH ST
Weschester Lot 101

Return | Permit | Land | Contractor | Inspections | Business | Cash Batch | Fee Calculator |

Permit | Party | Contractor | Fee | Statement | Review | Requirement | Inspection | Attachment | Activity | Attributes | Comments | Blanketed | Workflow | Acknowledgements | Projects |

Application | Print Permit | Print CC | Print CO | Print Temp CO | Print Temp CC | Print Comments |

Status CLOSED

Permit

Classification	New Residential Dwelling
Applicant Type	Contractor-Sub contractors required
Project Name	Weschester Lot 101
Submit Date	02/28/2017
Issue Date	03/17/2017
Exemption	

☐ Hide current review rounds from online
☐ Show fees online
☐ Create record in Document Management Application
Description of Work: New Single Family Dwelling Lot 101 - 1974 heated sq ft 2565 total sq ft

Comments: NOC rec/sublist rec
**********project dox*************

Parcel	0609040101
Address	08241 NW 54TH ST, Gainesville, FL, 32653
Warning Flagged	
Final Inspection Date	07/27/2017
CO Date	07/27/2017
TCO Issue	
Expiration Date	01/23/2018
IVR pin	59728
CC Date	
TCO Expiration	

Parties

Primary	Name	Role	Company	Phone	Address	City
◉	REO FUNDING SOLUTIONS V LLC				3424 PEACHTREE RD NE STE 1775	ATLANTA

Contractors

Primary	Business	Name	Phone	Address	City
◉	NEW ATLANTIC BUILDERS	WILLIAM TOWERS	(904) 374-2839	5875 Mining Terrace S	JACKSONVILLE
◯	HUNTER ELECTRIC COMP/	ROBERT D HUNTER	(904) 268-4203	11624 DAVIS CREEK RD	JACKSONVILLE
◯	DEL-AIR HEATING A/C &	ROBERT G DELL RUSSO	(407) 333-2665	PO BOX 520522	LONGWOOD
◯	HOFFMANN PLUMBING II,	CHRISTOPHER HOFFMANN	(904) 282-9433	3918 EQUESTRIAN CT	MIDDLEBURG
◯	DWC CONTRACTING INC	Jeffrey Boker	(352) 339-6387	426 NW 19 AVE	Gainesville

Return | Application | Print Permit | Print CC | Print CO | Print Temp CO | Print Temp CC | Print Comments |

CITY OF GAINESVILLE

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FLORIDA

Building Permit

CONTRACTORS AND OWNERS INSPECTION LINE (352) 334-5050

Application Date: 02/28/2017   **Date Issued: 03/17/2017**   **Permit No: BP-17-01002**

Parcel No: 06009040101   **Job Address: 08241 NW 54TH ST**

Permit Type: New Residential Dwelling

Description of work: New Single Family Dwelling Lot 101 - 1974 heated sq ft 2565 total sq ft   **Construction Type: V-B Any material permitted by Code**

Contractor: NEW ATLANTIC BUILDERS INC   **Occupancy Type: Residential R-3**

Owner: REO FUNDING SOLUTIONS V LLC   **Job Cost/Valuation: 225796**

Permit Fee: $2,159.87   **Square Feet: 2565**

Code Edition in Effect: Florida Building Code 6th Edition

Approved plans MUST be retained on the job and this card KEPT POSTED until final inspections have been approved. All structures require a Final Inspection. Buildings may not be occupied until approved by the Building Official.

This permit expires and becomes null and void if work is not started within six (6) months.
An inspection must be scheduled and passed every six (6) months to keep this permit active.

NOTICE: In addition to the requirements of this permit, there may be additional restrictions applicable to this property that may be found in the public records of this county, and there may be additional permits required from other governmental entities such as water management districts, state agencies, or federal agencies.

WARNING TO OWNER: YOUR FAILURE TO RECORD A NOTICE OF COMMENCEMENT MAY RESULT IN YOUR PAYING TWICE FOR IMPROVEMENTS TO YOUR PROPERTY. IF YOU INTEND TO OBTAIN FINANCING CONSULT WITH YOUR LENDER OR AN ATTORNEY BEFORE RECORDING YOUR NOTICE OF COMMENCEMENT.

_____   _____
Building Official or Designee   Date

Permit No: BP-17-01002
Address: 08241 NW 54TH ST
Permit Type: New Residential Dwelling

CITY OF
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REQUIRED INSPECTIONS (To schedule the inspection call 352-334-5050 between 7:00am and 4:00pm on the workday prior to the proposed date of the inspection)

INSPECTION	INSPECTOR	DATE
Foundation/Footer #1	Hoefert , Rod	03/23/2017
Slab #1	Hoefert , Rod	03/23/2017
Electrical Groundwork #1	Hoefert , Rod	03/23/2017
Plumbing Rough In #1	Hoefert , Rod	03/21/2017
Exterior Wall Sheathing #1	Schultz , Rick	04/10/2017
House Wrap #1	Hoefert , Rod	05/01/2017
P & B Strapping #1	Schultz , Rick	04/10/2017
Mechanical Duct Rough #1	Hoefert , Rod	05/01/2017
Electrical Concealment #1	Hoefert , Rod	05/01/2017
Plumbing Top Out #1	Hoefert , Rod	05/01/2017
Interior Wall Framing #1	Hoefert , Rod	05/01/2017
Insulation #1	Hoefert , Rod	05/03/2017
Electrical Preliminary #1	Tschirhart , Bud	07/13/2017
Electrical Final #1	Tschirhart , Bud	07/27/2017
Gas Final #1	Tschirhart , Bud	07/27/2017
Mechanical Final #1	Tschirhart , Bud	07/27/2017
Plumbing Final #1	Tschirhart , Bud	07/27/2017
Building Final Inspection #1	Tschirhart , Bud	07/27/2017
Landscape Final #1	Luhrman , Earline	07/20/2017
Roof Final #1	Hoefert , Rod	05/01/2017
Window/door Attachments #1	Hoefert , Rod	05/01/2017
Driveway Apron #1	Gawley , Richard	06/27/2017
Driveway Final #1	Gawley , Richard	07/19/2017
Sidewalk Inspection #1	Gawley , Richard	06/27/2017
Roof Sheathing #2	Hoefert , Rod	04/12/2017
Roof Dry In #1	Hoefert , Rod	04/20/2017
Roof Flashing #1	Hoefert , Rod	04/20/2017
Plumbing Sewer #2	Harris , Randy	06/15/2017
Energy Compliance #1	Tschirhart , Bud	07/27/2017

CITY OF GAINESVILLE

every path starts with passion

FLORIDA

Building Inspection Department
Application for Building Permit
306 NE 6th Avenue "Thomas Center B"
PO Box 490 Station 9
Gainesville, Florida 32602
Phone/Inspections: 352-334-5050 Fax: 352-334-2207

Permit No: BP-17-01002	Date: 02/28/2017
Property Address: 08241 NW 54TH ST	
Parcel No: 06009040101	
Description of Work: New Single Family Dwelling Lot 101 - 1974 heated sq ft 2565 total sq ft	Permit Type: New Residential Dwelling
Property Zoning:	Job Cost/Valuation: 225796

Property Owner: REO FUNDING SOLUTIONS V LLC 3424 PEACHTREE RD NE STE 1775 ATLANTA, GA 30326	Contractor: WILLIAM TOWERS NEW ATLANTIC BUILDERS INC 5875 Mining Terrace Suite 206 JACKSONVILLE, FL 32210 (904) 374-2839

Occupancy Type: Residential R-3	Square Footage: 2565
Historic District:	Construction Type: V-B Any material permitted by Code
Flood Zone:	

Special Notes and Comments: **Warning to Owner: Your failure to record a notice of commencement may result in your paying twice for improvements to your property. A notice of commencement must be recorded and posted on the job site before the first inspection. If you intend to obtain financing, consult with your lender or an attorney before recording your notice of commencement.**

_____   _____
Print Name of Applicant   Signature of the applicant

FEES

Valuation-Cost Per Square Ft	$1,618.75
Plan Review Building	$323.75
Fire Assessment Fee	$154.46
Fire Assessment Fee - Adjustment	$90.09
State Surcharge 2010	$62.91
Total:	$2,249.96

Permit Processing and Tracking

| Permit Setup | Calculations | Printing & Checkout | Tracking |

Permit Number: 2002699

4923 NW 43 ST
OFFICE COMPLEX
Occupancy: Business

Permit Name
NEW OFFICE
Valuation: $ 55000

Permit Name: NEW OFFICE ▶

License Holder: ROBINSON,THOMAS ▶

Applicant: ROBINSHORE INC

Agent Reponsible For Permit Fees

Owner Contractor Other

THOMAS ROBINSON

Report Code ▶
New Offices, banks, and p ▶

Census Units
0

Substructure(Suite) ▶

Add   Edit

Description of work
NEW OFFICE BUILDING

Permit Notes/Subcontractors
NEED NOC

Save & Exit   Quit (No Save)

City of Gainesville - Building Inspection Department

P.O. Box 490 Station 9
Gainesville, FL 32602
Phone: 352.334.5050 Fax: 352.334.2207

NEW OFFICE APPLICATION

Applicant: **ROBINSHORE INC**

Permit: **2002699**	Applied: **02/12/2002**	Code: **324**
Valuation: **$ 55,000**	Property: **4923 NW 43 ST**	
Total Fees: **$ 0.00** Paid: **$ 2,210.40**	Address: **GAINESVILLE , FL 32602**	

Structure | Occupancy & Construction Type

OFFICE COMPLEX | **Business - Office (V-UNP)**

Square Footage
Heated: **1,000**
Unheated: **0**
Total: **1,000**

Parcel # (Primary)

Zoning
Property: **OF**
Fire:
Flood:
Special:
School:

SetBacks
Front **0.00** Rear **0.00**
Left **0.00** Right **0.00**

Utilities
Water: **CITY**   Sewer: **CITY**
Electric: Gas: **GRU**

Legal
Map: **3344**   Section: **23**
Township: **9S**   Range: **19E**
Lot: Block:

Primary Structure ☐   Height: Stories: Sprinklers ☐
Units   Occ Load **0**   Fire Alarm ☐

Owner
MILLHOPPER OFFICE PARK TRUST
5800 NW 38 AVE SU 101
GAINESVILLE, FL 32606
Phone:

Contractor
ROBINSHORE INC.
5800 NW 39 AVE SUITE 101
GAINESVILLE FL 32606
Phone: (352)-37.1-19 EXT. 92

Description of Work
NEW OFFICE BUILDING

License Holder
ROBINSON, THOMAS A.
CBC029122 Expires: 08/31/04
5800 NW 39 AVE SUITE 101
GAINESVILLE, FL 32606
Phone: (352)371.1992

_____   _____   _____   _____
Contractor or Agent   Date   Building Official or Designee   Date

City of Gainesville - Building Inspection Department

P.O. Box 490 Station 9

Gainesville, FL 32602

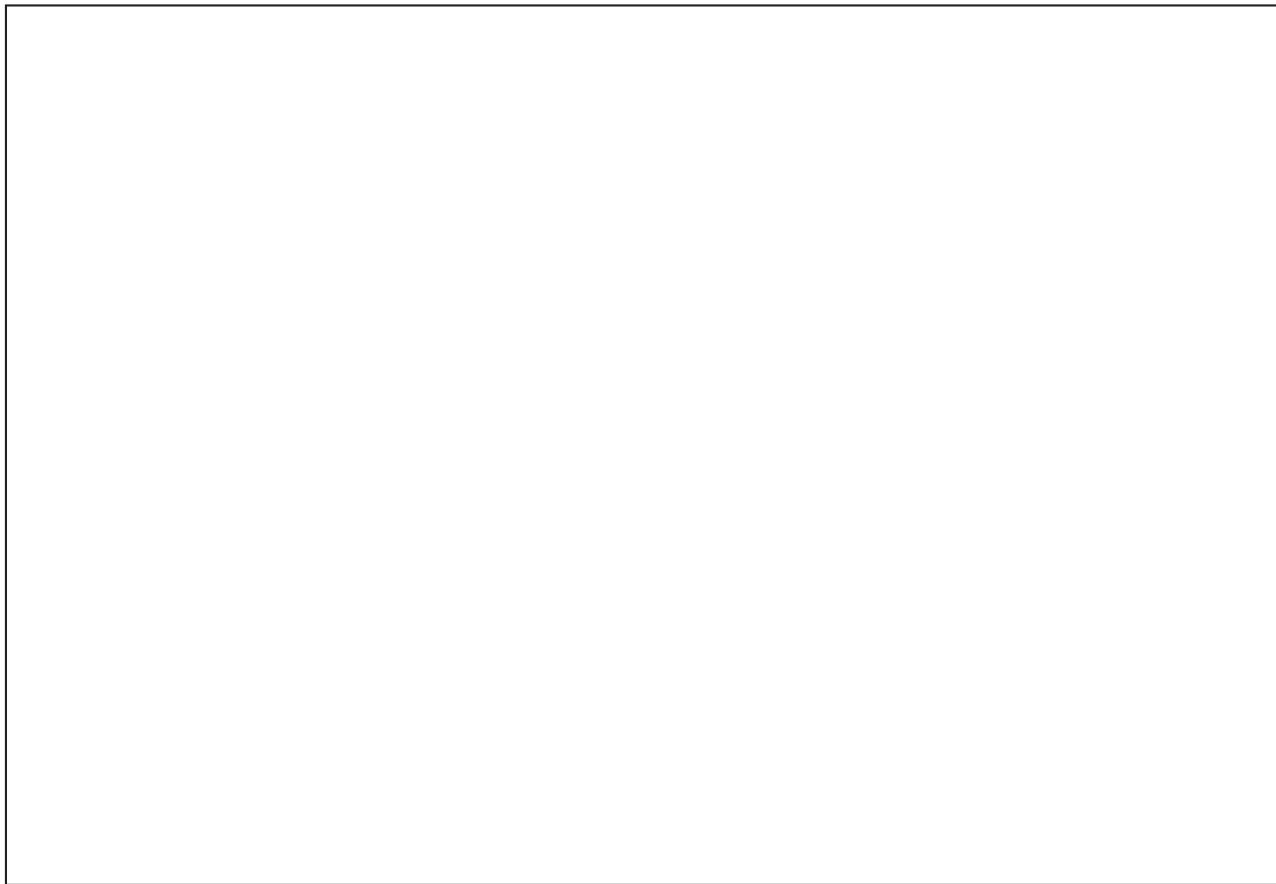*Phone: 352.334.5050 Fax: 352.334.2207*

INVOICE: Permit # 2002699 NEW OFFICE

Construction Address: 4923   NW 43 ST GAINESVILLE, FL 32602

ROBINSHORE INC.
Attn: THOMAS ROBINSON
5800 NW 39 AVE SUITE 101
GAINESVILLE, FL 32606

Permit Notes/Subcontractors

NEED NOC

Invoice Date: 02/12/2002

Payment History

Check	**28776**	**02/12/2002**	**$2,210.40**

Amount Paid: $2,210.40   **Balance Due: $-2,210.40**

(Please Submit Payment Based on This Invoice)

ADDENDUM NO. 2

Date: January 22, 2018   Bid Date: January 31, 2018
                                                                                  at 3:00 P.M. (Local Time)

Bid Name: Enterprise Permitting & Land Management Software   Bid No.:   DODX-180049-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

           The original Specifications remain in full force and effect except as revised by the following changes
           which shall take precedence over anything to the contrary:

1.   Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 3:00 p.m.
       (local time), January 24, 2018. Questions may be submitted as follows:
                     Email: dykemangb@cityofgainesville.org
                     or
                     Faxed (352) 334-3163
                     Attention: Gayle Dykeman

2.   Please find attached:

       a) Copy of the black out period information (Financial Procedures Manual Section 41-423
          Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid
          meeting.

The following are answers/clarifications to questions received.

3. Question: How many staff members will be using the system? Our pricing is based on named-users. If you
             can provide this list by department that would also be helpful.
    Answer: Code Enforcement 20 (estimate)
             Planning & Building 50 (estimate)

4. Question: Please confirm if the price proposal should be in a separate sealed envelope.
    Answer: Price proposals do not need to be in a separate envelope.

5. Question: It is mentioned on page 2 that a Corporate Seal is needed on the proposal and if one isn't
             available the proposal is to be notarized. One the "Proposal Response Form" there is a place for
             the corporate Seal and/or someone to "Attest". Is it acceptable to have another employee (VP)
             attest to the signature of the Proposer or does he need to have the document notarized?
    Answer: The document should be notarized.

6. Question: Is the Procurement Division Survey to be completed ONLY if we are NOT bidding or does the form need to be completed and included in our response?
    Answer: The Procurement Division Survey is to be competed ONLY if you are NOT bidding.

7. Question: Which financial system does the City currently use that this software would need to interface with?
    Answer: iNovah but Billing and Collections is looking to upgrade
    JetPay for online payments ie landlord, planning, business tax

8. Question: How many users (city-staff) will need access to the system?
    Answer: Please refer to question 3.

9. Question: How many users (city-staff) work primarily in the field (i.e. building inspectors, code enforcement officers, engineering site inspectors, etc.)?
    Answer: An estimate of 40 users will use the software in the field.

10. Question: Which financial system does the City currently use that this software would need to interface with?
    Answer: Please refer to question 7.

11. Question: Does the City plan on replacing ProjectDox or integrating with it?
    Answer: Integrate with ProjectDox

12. Question: What is the Synovia integration requirement – What is Synovia?
    Answer: The Synovia integration requirement involves routing inspections using GPS. Synovia is the vendor that the Department currently uses to track our fleet.

13. Question: What does the city currently use for IVR?
    Answer: The Department does not currently use IVR.

14. Question: Will the City continue to use Innoprise for Financials?
    Answer: The City doesn't use Innoprise for Financials; it uses CGI Advantage.

15. Question: What does the City currently use of online payments?
    Answer: Innoprises' Citizens Access portal with JetPay.

16. Question: What EDMS does the city currently use?
    Answer: The City currently uses a hybrid of Hummingbird, but is looking at other options.

17. Question: Was the BDS and eWacker data converted to Innoprise and therefore we are only converting from Innoprise?
    Answer: The BDS and eWacker data was not converted to Innoprise; all three systems will need to be converted to the new system.

18. Question: Is the City also looking for a Code Enforcement solution as part of this RFP?
    Answer: Yes

19. Question: How many named users (In office) are required?
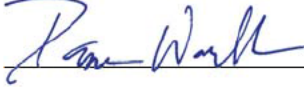   Answer: Approximately 70 users in office.

20. Question: How many named mobile users are required?
    Answer: Code Enforcement 17 (estimate)
              Building 21 (estimate)

21. Question: Is there a specific requirements matrix vendors are to compete as part of this RFP?
    Answer: No

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 2 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

<div align="center">CERTIFICATION BY PROPOSER</div>

The undersigned acknowledges receipt of this Addendum No. 2 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: T_ler Technolo_ies, Inc.

BY: _____   Dane Womble

DATE: 1/22/2018

CITY OF GAINESVILLE

FINANCIAL SERVICES PROCEDURES MANUAL

41-424   **Prohibition of lobbying in procurement matters**

Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

ADDENDUM NO. 1

Date: January 4, 2018	Bid Date: January 31, 2018
	at 3:00 P.M. (Local Time)

Bid Name: Enterprise Permitting & Land Management Software   Bid No.:   DODX-180049-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1.   Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 3:00 p.m. (local time), January 24, 2018. Questions may be submitted as follows:

> Email: dykemangb@cityofgainesville.org
> or
> Faxed (352) 334-3163
> Attention: Gayle Dykeman

2.   Please find attached:

a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.

The following are answers/clarifications to questions received.

3. Question: Is the City requiring that the price proposal be submitted independent and separately sealed from the technical proposal? The following statement on page 2 of the RFP doesn't indicate specifically: *"The original, all copies, and the separate sealed price envelope, if required, must be submitted in a sealed envelope or container stating on the outside the proposer's name, address, telephone number, RFP title, number and due date …"*

   Answer: Pricing proposal does not need to be in a separately sealed envelope.

4. Question: Per the RFP schedule, the deadline for questions is January 24 at 3:00pm and the due date is January 31. Can you tell me how quickly the City will respond after questions are received on the 17th so that proposer can incorporate any required changes and still meet the deadline of the 31st (factoring in shipping time, etc.)?

   Answer: Typical response is 2 business days, however, interested companies are encouraged to review the RFP and prepare all questions for the pre-proposal conference.

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

<div align="center">CERTIFICATION BY PROPOSER</div>

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Tyler Technologies, Inc.

BY: _[signature]_   Dane Womble

DATE: 1/5/18

CITY OF FINANCIAL SERVICES
GAINESVILLE PROCEDURES MANUAL

41-424 **Prohibition of lobbying in procurement matters**

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