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SOFTWARE AS A SERVICE AND PROFESSIONAL SERVICES AGREEMENT

This Software as a Service and Professional Services Agreement is made between Tyler Technologies, Inc. and Jackson County, Missouri ("Client").

WHEREAS, Client has issued a Request for Proposal for Maintenance of Assessment Records, RFP No. 69-19, a Request for Proposal for Reassessment Services, RFP No. 2-20 and a RFP for a Turn-Key Computer Assisted Mass Appraisal (CAMA) system, RFP No. 1-20 (collectively, the "RFP");

WHEREAS, Tyler submitted proposals in response to said RFP dated January 21, 2020 and February 25, 2020 to provide certain products and services, including providing Client with access to Tyler's proprietary software products, to fulfill the needs of the Client (collectively, the "Proposal");

NOW THEREFORE, in consideration of the foregoing and of the mutual covenants and promises set forth in this Agreement, Tyler and Client agree as follows:

SECTION A – DEFINITIONS

- **"Agreement"** means this Software as a Services and Professional Services Agreement.
- **"Business Travel Policy"** means our business travel policy. A copy of our current Business Travel Policy is attached as Schedule 1 to Exhibit B.
- **"Client"** means Jackson County, Missouri.
- **"Data"** means your data necessary to utilize the Tyler Software.
- **"Data Storage Capacity"** means the contracted amount of storage capacity for your Data identified in the Investment Summary.
- **"Defect"** means a failure of the Tyler Software to substantially conform to the functional descriptions set forth in our written proposal to you, or their functional equivalent. Future functionality may be updated, modified, or otherwise enhanced through our maintenance and support services, and the governing functional descriptions for such future functionality will be set forth in our then-current Documentation.
- **"Developer"** means a third party who owns the intellectual property rights to Third Party Software.
- **"Documentation"** means, as applicable, any online or written documentation related to the use or functionality of the Tyler Software that we provide or otherwise make available to you, including instructions, user guides, manuals and other training or self-help documentation.
- **"Effective Date"** means the date by which both your and our authorized representatives have signed the Agreement.
- **"Force Majeure"** means an event beyond the reasonable control of you or us, including, without limitation, governmental action, war, riot or civil commotion, fire, natural disaster, extreme inflation (eight percent or greater per year), or any other cause that could not with reasonable diligence be foreseen or prevented by you or us.
- **"Investment Summary"** means the agreed upon cost proposal for the products and services

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COUNTY CLERK

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attached as <u>Exhibit A</u>. For the Appraisal Services only (as defined in Section C (1.1) below), the Investment Summary sets forth the total fixed price and per diem to complete the services described in this Agreement

- **"Invoicing and Payment Policy"** means the invoicing and payment policy. A copy of our current Invoicing and Payment Policy is attached as <u>Exhibit B</u>.
- **"Project Initiation Date"** means, for the Implementation Services only (as defined in Section C (1.2) below), the date on which a kickoff meeting is held, a project calendar is established, and Tyler personnel begin work.
- **"SaaS Fees"** means the fees for the SaaS Services identified in the Investment Summary.
- **"SaaS Services"** means software as a service consisting of system administration, system management, and system monitoring activities that Tyler performs for the Tyler Software, and includes the right to access and use the Tyler Software, receive maintenance and support on the Tyler Software, including Downtime resolution under the terms of the SLA, and Data storage and archiving. SaaS Services do not include support of an operating system or hardware, support outside of our normal business hours, or training, consulting or other professional services.
- **"SLA"** means the service level agreement. A copy of our current SLA is attached hereto as <u>Exhibit C</u>.
- **"Statement of Work"** means the industry standard implementation plan describing how our professional services will be provided to implement the Tyler Software, and outlining your and our roles and responsibilities in connection with that implementation. The Statement of Work is attached as <u>Exhibit D</u>.
- **"Support Call Process"** means the support call process applicable to all of our customers who have licensed the Tyler Software. A copy of our current Support Call Process is attached as <u>Schedule 1</u> to <u>Exhibit C</u>.
- **"Third Party Hardware"** means the third party hardware, if any, identified in the Investment Summary.
- **"Third Party Products"** means the Third Party Software and Third Party Hardware.
- **"Third Party Services"** means the third party services, if any, identified in the Investment Summary.
- **"Third Party Software"** means the third party software, if any, identified in the Investment Summary.
- **"Third Party Terms"** means, if any, the end user license agreement(s) or similar terms for the Third Party Software, as applicable and attached as <u>Exhibit E</u>.
- **"Tyler"** means Tyler Technologies, Inc., a Delaware corporation.
- **"Tyler Software"** means our proprietary software, including any integrations, custom modifications, and/or other related interfaces identified in the Investment Summary and licensed by us to you through this Agreement.
- **"we"**, **"us"**, **"our"** and similar terms mean Tyler.
- **"you"** and similar terms mean Client.

SECTION B – SAAS SERVICES

1. <u>Rights Granted</u>. We grant to you the non-exclusive, non-assignable limited right to use the SaaS Services solely for your internal business purposes. The Tyler Software will be made available to you according to the terms of the SLA. You acknowledge that we have no delivery obligations and we will not ship copies of the Tyler Software as part of the SaaS Services. You may use the SaaS Services to access updates and enhancements to the Tyler Software, as further described in Section C(9). The

foregoing notwithstanding, to the extent we have sold you perpetual licenses for Tyler Software, if and listed in the Investment Summary, for which you are receiving SaaS Services, your rights to use such Tyler Software are perpetual, subject to the terms and conditions of this Agreement including, without limitation, Section B(4). We will make any such software available to you for download.

2. **SaaS Fees.** You agree to pay us the SaaS Fees. Those amounts are payable in accordance with our Invoicing and Payment Policy. The SaaS Fees are based on the amount of Data Storage Capacity. You may add additional data storage capacity on the terms set forth in Section H(1). In the event you regularly and/or meaningfully exceed the Data Storage Capacity, we reserve the right to charge you additional fees commensurate with the overage(s).

3. **Ownership.**

   3.1 We retain all ownership and intellectual property rights to the SaaS Services, the Tyler Software, and anything developed by us under this Agreement. You do not acquire under this Agreement any license to use the Tyler Software in excess of the scope and/or duration of the SaaS Services.

   3.2 The Documentation is licensed to you and may be used and copied by your employees for internal, non-commercial reference purposes only.

   3.3 You retain all ownership and intellectual property rights to the Data. You expressly recognize that except to the extent necessary to carry out our obligations contained in this Agreement, we do not create or endorse any Data used in connection with the SaaS Services.

4. **Restrictions.** You may not: (a) make the Tyler Software or Documentation resulting from the SaaS Services available in any manner to any third party for use in the third party's business operations; (b) modify, make derivative works of, disassemble, reverse compile, or reverse engineer any part of the SaaS Services; (c) access or use the SaaS Services in order to build or support, and/or assist a third party in building or supporting, products or services competitive to us; or (d) license, sell, rent, lease, transfer, assign, distribute, display, host, outsource, disclose, permit timesharing or service bureau use, or otherwise commercially exploit or make the SaaS Services, Tyler Software, or Documentation available to any third party other than as expressly permitted by this Agreement.

5. **Software Warranty.** We warrant that the Tyler Software will perform without Defects during the term of this Agreement. If the Tyler Software does not perform as warranted, we will use all reasonable efforts, consistent with industry standards, to cure the Defect in accordance with the maintenance and support process set forth in Section C(9), below, the SLA and our then current Support Call Process.

6. **SaaS Services.**

   6.1 Our SaaS Services are audited at least yearly in accordance with the AICPA's Statement on Standards for Attestation Engagements ("SSAE") No. 18. We have attained, and will maintain, SOC 1 and SOC 2 compliance, or its equivalent, for so long as you are timely paying for SaaS Services. Upon execution of a mutually agreeable Non-Disclosure Agreement ("NDA"), we will provide you with a summary of our compliance report(s) or its equivalent. Every year thereafter, for so long as the NDA is in effect and in which you make a written request, we will provide that same information.

6.2 You will be hosted on shared hardware in a Tyler data center or in a third-party data center. In either event, databases containing your Data will be dedicated to you and inaccessible to our other customers.

6.3 Our Tyler data centers have fully-redundant telecommunications access, electrical power, and the required hardware to provide access to the Tyler Software in the event of a disaster or component failure. In the event any of your Data has been lost or damaged due to an act or omission of Tyler or its subcontractors or due to a defect in Tyler's software, we will use best commercial efforts to restore all the Data on servers in accordance with the architectural design's capabilities and with the goal of minimizing any Data loss as greatly as possible. In no case shall the recovery point objective ("RPO") exceed a maximum of twenty-four (24) hours from declaration of disaster. For purposes of this subsection, RPO represents the maximum tolerable period during which your Data may be lost, measured in relation to a disaster we declare, said declaration will not be unreasonably withheld.

6.4 In the event we declare a disaster, our Recovery Time Objective ("RTO") is twenty-four (24) hours. For purposes of this subsection, RTO represents the amount of time, after we declare a disaster, within which your access to the Tyler Software must be restored.

6.5 We conduct annual penetration testing of either the production network and/or web application to be performed. We will maintain industry standard intrusion detection and prevention systems to monitor malicious activity in the network and to log and block any such activity. We will provide you with a written or electronic record of the actions taken by us in the event that any unauthorized access to your database(s) is detected as a result of our security protocols. We will undertake an additional security audit, on terms and timing to be mutually agreed to by the parties, at your written request. You may not attempt to bypass or subvert security restrictions in the SaaS Services or environments related to the Tyler Software. Unauthorized attempts to access files, passwords or other confidential information, and unauthorized vulnerability and penetration test scanning of our network and systems (hosted or otherwise) is prohibited without the prior written approval of our IT Security Officer.

6.6 We test our disaster recovery plan on an annual basis. Our standard test is not client-specific. Should you request a client-specific disaster recovery test, we will work with you to schedule and execute such a test on a mutually agreeable schedule. At your written request, we will provide test results to you within a commercially reasonable timeframe after receipt of the request.

6.7 We will be responsible for importing back-up and verifying that you can log-in. You will be responsible for running reports and testing critical processes to verify the returned Data.

6.8 We provide secure Data transmission paths between each of your workstations and our servers.

6.9 Tyler data centers are accessible only by authorized personnel with a unique key entry. All other visitors to Tyler data centers must be signed in and accompanied by authorized personnel. Entry attempts to the data center are regularly audited by internal staff and external auditors to ensure no unauthorized access.

6.10 Where applicable with respect to our applications that take or process card payment data, we are responsible for the security of cardholder data that we possess, including functions relating to storing, processing, and transmitting of the cardholder data and affirm that, as of the Effective Date, we comply with applicable requirements to be considered PCI DSS compliant and have performed the necessary steps to validate compliance with the PCI DSS. We agree to supply the current status of our PCI DSS compliance program in the form of an official Attestation of Compliance, which can be found at https://www.tylertech.com/about-us/compliance, and in the event of any change in our status, will comply with applicable notice requirements.

SECTION C – OTHER PROFESSIONAL SERVICES

1. Other Professional Services.

    1.1 We will provide you with the professional appraisal services ("Appraisal Services"), consistent with industry standards, as described in the Statement of Work.

    1.2 We will provide you the various implementation-related services itemized in the Investment Summary ("Implementation Services") and described in the Statement of Work. You will receive the Implementation Services according to our industry standard implementation plan, which outlines roles and responsibilities in calendar and project documentation. We will finalize that documentation with you upon execution of this Agreement.

2. Professional Services Fees. You agree to pay us the professional services fees in the amounts set forth in the Investment Summary. Those amounts are payable in accordance with our Invoicing and Payment Policy.

3. Additional Services.

    3.1 The Investment Summary contains, and the Statement of Work describes, the related costs required for the Appraisal Services project based on our understanding of the specifications you supplied and on the laws, rules, and regulations applicable to the project as of the Effective Date.

    3.2 The Investment Summary contains, and the Statement of Work describes, the scope of services and related costs (including programming and/or interface estimates) required for the Implementation Services project based on our understanding of the specifications you supplied and our assumption that each party timely meets its obligations pursuant to the project schedule as mutually developed and managed by the parties pursuant to the Statement of Work.

    3.3 If additional work is required under the Statement of Work, or if you use or request additional services, we will provide you with an addendum or change order, as applicable, outlining the costs for the additional work. The price quotes in the addendum or change order will be valid for thirty (30) days from the date of the quote.

4. Cancellation. If travel is required, we will make all reasonable efforts to schedule travel for our personnel, including arranging travel reservations, at least two (2) weeks in advance of

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commitments. Therefore, if you cancel services less than two (2) weeks in advance (other than for Force Majeure or breach by us), you will be liable for all (a) non-refundable expenses incurred by us on your behalf, and (b) daily fees associated with cancelled professional services if we are unable to reassign our personnel. We will make all reasonable efforts to reassign personnel in the event you cancel within two (2) weeks of scheduled commitments.

5. <u>Services Warranty</u>.

   5.1 We will perform the Appraisal Services in a professional, workmanlike manner, consistent with industry standards and the specifications described in the Statement of Work.

   5.2 We will perform the Implementation Services in a professional, workmanlike manner, consistent with industry standards. In the event we provide Implementation Services that do not conform to this warranty, we will re-perform such Implementation Services at no additional cost to you.

6. <u>Site Access and Requirements</u>. At no cost to us, you agree to provide us with full and free access to your personnel, facilities, and equipment as may be reasonably necessary for us to provide the Appraisal Services and Implementation Services, subject to any reasonable security protocols or other written policies provided to us as of the Effective Date, and thereafter as mutually agreed to by you and us.

7. <u>Background Checks</u>. For at least the past twelve (12) years, all of our employees have undergone criminal background checks prior to hire. All employees sign our confidentiality agreement and security policies.

8. <u>Client Assistance</u>. You acknowledge that the implementation of the Tyler Software is a cooperative process requiring the time and resources of your personnel. You agree to use all reasonable efforts to cooperate with and assist us as may be reasonably required to meet the agreed upon project deadlines and other milestones for implementation. This cooperation includes at least working with us to schedule the implementation-related services outlined in this Agreement. We will not be liable for failure to meet any deadlines and milestones when such failure is due to Force Majeure or to the failure by your personnel to provide such cooperation and assistance (either through action or omission).

9. <u>Maintenance and Support</u>. For so long as you timely pay your SaaS Fees according to the Invoicing and Payment Policy, then in addition to the terms set forth in the SLA and the Support Call Process, we will:

   9.1 perform our maintenance and support obligations in a professional, good, and workmanlike manner, consistent with industry standards, to resolve Defects in the Tyler Software (subject to any applicable release life cycle policy);

   9.2 provide support during our established support hours;

   9.3 maintain personnel that are sufficiently trained to be familiar with the Tyler Software and Third Party Software, if any, in order to provide maintenance and support services;

   9.4 make available to you all releases to the Tyler Software (including updates and enhancements)

that we make generally available without additional charge to customers who have a maintenance and support agreement in effect; and

9.5 provide non-Defect resolution support of prior releases of the Tyler Software in accordance with any applicable release life cycle policy.

We will use all reasonable efforts to perform support services remotely. Currently, we use a third-party secure unattended connectivity tool called Bomgar, as well as GotoAssist by Citrix. Therefore, you agree to maintain a high-speed internet connection capable of connecting us to your PCs and server(s). You agree to provide us with a login account and local administrative privileges as we may reasonably require to perform remote services. We will, at our option, use the secure connection to assist with proper diagnosis and resolution, subject to any reasonably applicable security protocols. If we cannot resolve a support issue remotely, we may be required to provide onsite services. In such event, we will be responsible for our travel expenses, unless it is determined that the reason onsite support was required was a reason outside our control. Either way, you agree to provide us with full and free access to the Tyler Software, working space, adequate facilities within a reasonable distance from the equipment, and use of machines, attachments, features, or other equipment reasonably necessary for us to provide the maintenance and support services, all at no charge to us. We strongly recommend that you also maintain your VPN for backup connectivity purposes.

For the avoidance of doubt, SaaS Fees do not include the following services: (a) onsite support (unless Tyler cannot remotely correct a Defect in the Tyler Software, as set forth above); (b) application design; (c) other consulting services; or (d) support outside our normal business hours as listed in our then-current Support Call Process. Requested services such as those outlined in this section will be billed to you on a time and materials basis at our then current rates. You must request those services with at least one (1) weeks' advance notice.

10. Change in Legal Requirements. The parties acknowledge that the terms and conditions of this Agreement are based on the laws, rules and regulations as of the Effective Date. In the event any applicable laws, rules or regulations change so as to create additional work for us not provided for in this Agreement, Client shall allow us a reasonable extension of time to complete the services, and additional compensation as provided in Section C(3) above.

SECTION D – THIRD PARTY PRODUCTS

1. Third Party Hardware. We will sell, deliver, and install onsite the Third Party Hardware, if you have purchased any, for the price set forth in the Investment Summary. Those amounts are payable in accordance with our Invoicing and Payment Policy.

2. Third Party Software. As part of the SaaS Services, you will receive access to the Third Party Software and related documentation for internal business purposes only. Your rights to the Third Party Software will be governed by the Third Party Terms.

3. Third Party Products Warranties.

   3.1 We are authorized by each Developer to grant access to the Third Party Software.

3.2 The Third Party Hardware will be new and unused, and upon payment in full, you will receive free and clear title to the Third Party Hardware.

3.3 You acknowledge that we are not the manufacturer of the Third Party Products. We do not warrant or guarantee the performance of the Third Party Products. However, we grant and pass through to you any warranty that we may receive from the Developer or supplier of the Third Party Products.

4. <u>Third Party Services</u>. If you have purchased Third Party Services, those services will be provided independent of Tyler by such third-party at the rates set forth in the Investment Summary and in accordance with our Invoicing and Payment Policy.

SECTION E - INVOICING AND PAYMENT; INVOICE DISPUTES

1. <u>Invoicing and Payment</u>. We will invoice you the SaaS Fees and fees for other professional services in the Investment Summary per our Invoicing and Payment Policy, subject to Section E(2).

2. <u>Invoice Disputes</u>. If you believe any delivered software or service does not conform to the warranties in this Agreement, you will provide us with written notice within thirty (30) days of your receipt of the applicable invoice. The written notice must contain reasonable detail of the issues you contend are in dispute so that we can confirm the issue and respond to your notice with either a justification of the invoice, an adjustment to the invoice, or a proposal addressing the issues presented in your notice. We will work with you as may be necessary to develop an action plan that outlines reasonable steps to be taken by each of us to resolve any issues presented in your notice. You may withhold payment of the amount(s) actually in dispute, and only those amounts, until we complete the action items outlined in the plan. If we are unable to complete the action items outlined in the action plan because of your failure to complete the items agreed to be done by you, then you will remit full payment of the invoice. We reserve the right to suspend delivery of all SaaS Services, including maintenance and support services, if you fail to pay an invoice not disputed as described above within fifteen (15) days of notice of our intent to do so.

SECTION F – TERM AND TERMINATION

1. <u>Term</u>. This Agreement shall be effective as of the Effective Date. The initial term for the SaaS Services and the Appraisal Services shall be as follows:

   1.1 <u>SaaS Services</u>. The initial term of this Agreement is two (2) years from the first day of the first month following the Project Initiation Date, unless earlier terminated as set forth below. Upon expiration of the initial term, this Agreement can be renewed annually for additional one (1) year renewal terms at our then-current SaaS Fees upon written mutual consent of the parties. Your right to access or use the Tyler Software and the SaaS Services will terminate at the end of this Agreement.

   1.2 <u>Appraisal Services</u>. The term for the Appraisal Services shall commence on the Effective Date and shall continue through <u>December 31, 2023 provided that in the event there are any appeals, Tyler shall provide litigation support, as set forth in the Statement of Work, and the term shall continue through expiration of all such appeals</u>. The term for Appraisal Services may be renewed upon written mutual agreement of the parties.

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2. <u>Termination</u>. This Agreement may be terminated as set forth below. In the event of termination, you will pay us for all undisputed fees and expenses related to the software, products, and/or services you have received, or we have incurred or delivered, prior to the effective date of termination. Disputed fees and expenses in all terminations other than your termination for cause must have been submitted as invoice disputes in accordance with Section E(2).

2.1 <u>Failure to Pay SaaS Fees</u>. You acknowledge that continued access to the SaaS Services is contingent upon your timely payment of SaaS Fees. If you fail to timely pay the SaaS Fees, we may discontinue the SaaS Services and deny your access to the Tyler Software. We may also terminate this Agreement if you don't cure such failure to pay within forty-five (45) days of receiving written notice of our intent to terminate.

2.2 <u>For Cause</u>. If you believe we have materially breached this Agreement, you will invoke the Dispute Resolution clause set forth in Section H(3). You may terminate this Agreement for cause in the event we do not cure, or create a mutually agreeable action plan to address, a material breach of this Agreement within the thirty (30) day window set forth in Section H(3).

2.3 <u>Force Majeure</u>. Either party has the right to terminate this Agreement if a Force Majeure event suspends performance of the SaaS Services for a period of forty-five (45) days or more.

2.4 <u>Lack of Appropriations</u>. If you should not appropriate or otherwise make available funds sufficient to utilize the SaaS Services, you may unilaterally terminate this Agreement upon thirty (30) days written notice to us. You will not be entitled to a refund or offset of previously paid, but unused SaaS Fees. You agree not to use termination for lack of appropriations as a substitute for termination for convenience.

2.5 <u>Fees for Termination without Cause during Initial Term</u>. If you terminate this Agreement during the initial term for any reason other than cause, Force Majeure, or lack of appropriations, or if we terminate this Agreement during the initial term for your failure to pay SaaS Fees, you shall pay us the following early termination fees:

    a. if you terminate during the first year of the initial term, 100% of the SaaS Fees through the date of termination plus 25% of the SaaS Fees then due for the remainder of the initial term;

    b. if you terminate during the second year of the initial term, 100% of the SaaS Fees through the date of termination plus 15% of the SaaS Fees then due for the remainder of the initial term; and

    c. if you terminate after the second year of the initial term, 100% of the SaaS Fees through the date of termination plus 10% of the SaaS Fees then due for the remainder of the initial term.

SECTION G – INDEMNIFICATION, LIMITATION OF LIABILITY AND INSURANCE

1.   <u>Intellectual Property Infringement Indemnification</u>.

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1.1 We will defend you against any third party claim(s) that the Tyler Software or Documentation infringes that third party's patent, copyright, or trademark, or misappropriates its trade secrets, and will pay the amount of any resulting adverse final judgment (or settlement to which we consent). You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.

1.2 Our obligations under this Section G(1) will not apply to the extent the claim or adverse final judgment is based on your use of the Tyler Software in contradiction of this Agreement, including with non-licensed third parties, or your willful infringement.

1.3 If we receive information concerning an infringement or misappropriation claim related to the Tyler Software, we may, at our expense and without obligation to do so, either: (a) procure for you the right to continue its use; (b) modify it to make it non-infringing; or (c) replace it with a functional equivalent, in which case you will stop running the allegedly infringing Tyler Software immediately. Alternatively, we may decide to litigate the claim to judgment, in which case you may continue to use the Tyler Software consistent with the terms of this Agreement.

1.4 If an infringement or misappropriation claim is fully litigated and your use of the Tyler Software is enjoined by a court of competent jurisdiction, in addition to paying any adverse final judgment (or settlement to which we consent), we will, at our option, either: (a) procure the right to continue its use; (b) modify it to make it non-infringing; or (c) replace it with a functional equivalent. This section provides your exclusive remedy for third party copyright, patent, or trademark infringement and trade secret misappropriation claims.

2. <u>General Indemnification</u>.

2.1 We will indemnify and hold harmless you and your agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for (a) personal injury or property damage to the extent caused by our negligence or willful misconduct; or (b) our violation of PCI-DSS requirements or a law applicable to our performance under this Agreement. You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.

2.2 To the extent permitted by applicable law, you will indemnify and hold harmless us and our agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for personal injury or property damage to the extent caused by your negligence or willful misconduct; or (b) your violation of a law applicable to your performance under this Agreement. We will notify you promptly in writing of the claim and will give you sole control over its defense or settlement. We agree to provide you with reasonable assistance, cooperation, and information in defending the claim at your expense.

3. <u>DISCLAIMER.</u> EXCEPT FOR THE EXPRESS WARRANTIES PROVIDED IN THIS AGREEMENT AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, WE HEREBY DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, BUT

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NOT LIMITED TO, ANY IMPLIED WARRANTIES, DUTIES, OR CONDITIONS OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

4. **LIMITATION OF LIABILITY.**

   4.1 EXCEPT AS OTHERWISE EXPRESSLY SET FORTH IN THIS AGREEMENT, OUR LIABILITY FOR DAMAGES ARISING OUT OF OR IN CONNECTION WITH THE APPRAISAL SERVICES PROVIDED UNDER THIS AGREEMENT, WHETHER BASED ON A THEORY OF CONTRACT OR TORT, INCLUDING NEGLIGENCE AND STRICT LIABILITY, SHALL BE LIMITED TO THE LESSER OF (A) YOUR ACTUAL DIRECT DAMAGES; OR (B) THE AMOUNTS FOR THE APPRAISAL SERVICES PAID BY YOU UNDER THIS AGREEMENT.

   4.2 EXCEPT AS OTHERWISE EXPRESSLY SET FORTH IN THIS AGREEMENT, OUR LIABILITY FOR DAMAGES ARISING OUT OF THE TYLER SOFTWARE AND IMPLEMENTATION SERVICES PROVIDED UNDER THIS AGREEMENT, WHETHER BASED ON A THEORY OF CONTRACT OR TORT, INCLUDING NEGLIGENCE AND STRICT LIABILITY, SHALL BE LIMITED TO YOUR ACTUAL DIRECT DAMAGES, NOT TO EXCEED (A) DURING THE INITIAL TERM, AS SET FORTH IN SECTION F(1), TOTAL FEES PAID AS OF THE TIME OF THE CLAIM; OR (B) DURING ANY RENEWAL TERM, THE THEN-CURRENT ANNUAL SAAS FEES PAYABLE IN THAT RENEWAL TERM. THE PARTIES ACKNOWLEDGE AND AGREE THAT THE PRICES SET FORTH IN THIS AGREEMENT ARE SET IN RELIANCE UPON THIS LIMITATION OF LIABILITY AND TO THE MAXIMUM EXTENT ALLOWED UNDER APPLICABLE LAW, THE EXCLUSION OF CERTAIN DAMAGES, AND EACH SHALL APPLY REGARDLESS OF THE FAILURE OF AN ESSENTIAL PURPOSE OF ANY REMEDY. THE FOREGOING LIMITATION OF LIABILITY SHALL NOT APPLY TO CLAIMS THAT ARE SUBJECT TO SECTIONS G(1) AND G(2).

5. **EXCLUSION OF CERTAIN DAMAGES.** TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL WE BE LIABLE FOR ANY SPECIAL, INCIDENTAL, PUNITIVE, INDIRECT, OR CONSEQUENTIAL DAMAGES WHATSOEVER, EVEN IF WE HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

6. Insurance. During the course of performing services under this Agreement, we agree to maintain the following levels of insurance: (a) Commercial General Liability of at least $1,000,000; (b) Automobile Liability of at least $1,000,000; (c) Professional Liability of at least $1,000,000; (d) Workers Compensation complying with applicable statutory requirements; and (e) Excess/Umbrella Liability of at least $5,000,000. We will add you as an additional insured to our Commercial General Liability and Automobile Liability policies, which will automatically add you as an additional insured to our Excess/Umbrella Liability policy as well. We will provide you with copies of certificates of insurance upon your written request.

SECTION H – GENERAL TERMS AND CONDITIONS

1. Additional Products and Services. You may purchase additional products and services at our then-current list price, by executing a mutually agreed addendum. The terms of this Agreement will control any such additional purchase(s), unless otherwise specifically provided in the addendum.

2. Optional Items. Pricing for any listed optional products and services in the Investment Summary will be valid for twelve (12) months from the Effective Date.

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3. <u>Dispute Resolution</u>. You agree to provide us with written notice within thirty (30) days of becoming aware of a dispute. You agree to cooperate with us in trying to reasonably resolve all disputes, including, if requested by either party, appointing a senior representative to meet and engage in good faith negotiations with our appointed senior representative. Senior representatives will convene within thirty (30) days of the written dispute notice, unless otherwise agreed. All meetings and discussions between senior representatives will be deemed confidential settlement discussions not subject to disclosure under Federal Rule of Evidence 408 or any similar applicable state rule. If we fail to resolve the dispute, then the parties shall participate in non-binding mediation in an effort to resolve the dispute. If the dispute remains unresolved after mediation, then either of us may assert our respective rights and remedies in a court of competent jurisdiction. Nothing in this section shall prevent you or us from seeking necessary injunctive relief during the dispute resolution procedures.

4. <u>Taxes</u>. The fees in the Investment Summary do not include any taxes, including, without limitation, sales, use, or excise tax. If you are a tax-exempt entity, you agree to provide us with a tax-exempt certificate. Otherwise, we will pay all applicable taxes to the proper authorities and you will reimburse us for such taxes. If you have a valid direct-pay permit, you agree to provide us with a copy. For clarity, we are responsible for paying our income taxes, both federal and state, as applicable, arising from our performance of this Agreement.

5. <u>Nondiscrimination</u>. We will not discriminate against any person employed or applying for employment concerning the performance of our responsibilities under this Agreement. This discrimination prohibition will apply to all matters of initial employment, tenure, and terms of employment, or otherwise with respect to any matter directly or indirectly relating to employment concerning race, color, religion, national origin, age, sex, sexual orientation, ancestry, disability that is unrelated to the individual's ability to perform the duties of a particular job or position, height, weight, marital status, or political affiliation. We will post, where appropriate, all notices related to nondiscrimination as may be required by applicable law.

6. <u>E-Verify</u>. We have complied, and will comply, with the E-Verify procedures administered by the U.S. Citizenship and Immigration Services Verification Division for all of our employees assigned to your project.

7. <u>Subcontractors</u>. We will not subcontract any services under this Agreement without your prior written consent, not to be unreasonably withheld.

8. <u>Binding Effect; No Assignment</u>. This Agreement shall be binding on, and shall be for the benefit of, either your or our successor(s) or permitted assign(s). Neither party may assign this Agreement without the prior written consent of the other party; provided, however, your consent is not required for an assignment by us as a result of a corporate reorganization, merger, acquisition, or purchase of substantially all of our assets.

9. <u>Force Majeure</u>. Except for your payment obligations, neither party will be liable for delays in performing its obligations under this Agreement to the extent that the delay is caused by Force Majeure; provided, however, that within ten (10) business days of the Force Majeure event, the party whose performance is delayed provides the other party with written notice explaining the cause and extent thereof, as well as a request for a reasonable time extension equal to the

estimated duration of the Force Majeure event.

10. <u>No Intended Third Party Beneficiaries</u>. This Agreement is entered into solely for the benefit of you and us. No third party will be deemed a beneficiary of this Agreement, and no third party will have the right to make any claim or assert any right under this Agreement. This provision does not affect the rights of third parties under any Third Party Terms.

11. <u>Entire Agreement; Amendment</u>. This Agreement represents the entire agreement between you and us with respect to the subject matter hereof, and supersedes any prior agreements, understandings, and representations, whether written, oral, expressed, implied, or statutory. Purchase orders submitted by you, if any, are for your internal administrative purposes only, and the terms and conditions contained in those purchase orders will have no force or effect. This Agreement may only be modified by a written amendment signed by an authorized representative of each party.

12. <u>Severability</u>. If any term or provision of this Agreement is held invalid or unenforceable, the remainder of this Agreement will be considered valid and enforceable to the fullest extent permitted by law.

13. <u>No Waiver</u>. In the event that the terms and conditions of this Agreement are not strictly enforced by either party, such non-enforcement will not act as or be deemed to act as a waiver or modification of this Agreement, nor will such non-enforcement prevent such party from enforcing each and every term of this Agreement thereafter.

14. <u>Independent Contractor</u>. We are an independent contractor for all purposes under this Agreement.

15. <u>Notices</u>. All notices or communications required or permitted as a part of this Agreement, such as notice of an alleged material breach for a termination for cause or a dispute that must be submitted to dispute resolution, must be in writing and will be deemed delivered upon the earlier of the following: (a) actual receipt by the receiving party; (b) upon receipt by sender of a certified mail, return receipt signed by an employee or agent of the receiving party; (c) upon receipt by sender of proof of email delivery; or (d) if not actually received, five (5) days after deposit with the United States Postal Service authorized mail center with proper postage (certified mail, return receipt requested) affixed and addressed to the other party at the address set forth on the signature page hereto or such other address as the party may have designated by proper notice. The consequences for the failure to receive a notice due to improper notification by the intended receiving party of a change in address will be borne by the intended receiving party.

16. <u>Client Lists</u>. You agree that we may identify you by name in client lists, marketing presentations, and promotional materials.

17. <u>Confidentiality</u>. Both parties recognize that their respective employees and agents, in the course of performance of this Agreement, may be exposed to confidential information and that disclosure of such information could violate rights to private individuals and entities, including the parties. Confidential information is nonpublic information that a reasonable person would believe to be confidential and includes, without limitation, personal identifying information (*e.g.*, social security numbers) and trade secrets, each as defined by applicable state law. Each party agrees that it will not disclose any confidential information of the other party and further agrees to take all reasonable and appropriate action to prevent such disclosure by its employees or agents. The confidentiality

covenants contained herein will survive the termination or cancellation of this Agreement. This obligation of confidentiality will not apply to information that:

(a) is in the public domain, either at the time of disclosure or afterwards, except by breach of this Agreement by a party or its employees or agents;
(b) a party can establish by reasonable proof was in that party's possession at the time of initial disclosure;
(c) a party receives from a third party who has a right to disclose it to the receiving party; or
(d) is the subject of a legitimate disclosure request under the open records laws or similar applicable public disclosure laws governing this Agreement; provided, however, that in the event you receive an open records or other similar applicable request, you will give us prompt notice and otherwise perform the functions required by applicable law.

18. <u>Business License</u>. In the event a local business license is required for us to perform services hereunder, you will promptly notify us and provide us with the necessary paperwork and/or contact information so that we may timely obtain such license.

19. <u>Governing Law</u>. This Agreement will be governed by and construed in accordance with the laws of your state of domicile, without regard to its rules on conflicts of law.

20. <u>Multiple Originals and Authorized Signatures</u>. This Agreement may be executed in multiple originals, any of which will be independently treated as an original document. Any electronic, faxed, scanned, photocopied, or similarly reproduced signature on this Agreement or any amendment hereto will be deemed an original signature and will be fully enforceable as if an original signature. Each party represents to the other that the signatory set forth below is duly authorized to bind that party to this Agreement.

22. <u>Cooperative Procurement</u>. To the maximum extent permitted by applicable law, we agree that this Agreement may be used as a cooperative procurement vehicle by eligible jurisdictions. We reserve the right to negotiate and customize the terms and conditions set forth herein, including but not limited to pricing, to the scope and circumstances of that cooperative procurement.

23. <u>Non-Solicitation</u>. To the extent allowed by applicable law, you will not (i) solicit for employment or (ii) hire any employee of ours during the term of this Agreement and for a period of six (6) months following the termination of this Agreement without our express written consent.

24. <u>Purpose/Use Of Appraisals</u>. By virtue of this Agreement we are contracted to provide certain services specified herein and recommendations of value to you which are intended for exclusive use by you for determinations of assessment for ad valorem tax purposes. Any use other than that stated above is not authorized nor intended, and most specifically excluded is an opinion of value used for federally related real estate transactions or other mortgage purposes.

25. <u>Contract Documents</u>. This Agreement includes the following exhibits:

Exhibit A	Investment Summary
Exhibit B	Invoicing and Payment Policy
	Schedule 1: Business Travel Policy
Exhibit C	Service Level Agreement

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Schedule 1: Support Call Process
Statement of Work

IN WITNESS WHEREOF, a duly authorized representative of each party has executed this Agreement as of the date(s) set forth below.

Tyler Technologies, Inc.

By: _____

Name: Gus Tenhundfeld

Title: Inside Sales Manager

Date: 10/27/2020

Address for Notices:
Tyler Technologies, Inc.
One Tyler Drive
Yarmouth, ME 04096
Attention: Chief Legal Officer

Jackson County, Missouri

By: _____

Name: Bob Crutsinger

Title: Director of Finance

Date: 10-28-2020

Address for Notices:
Jackson County, Assessment Department
Jackson County Courthouse, Room G-1
415 East 12 Street
Kansas City, MO 64106
Attention: Jay Haden, Deputy County Counselor
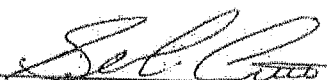
APPROVED AS TO FORM

_____
County Counselor

ATTEST:

_____
Clerk of the County Legislature

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REVENUE CERTIFICATE

I hereby certify that there is a balance otherwise unencumbered to the credit of the appropriation to which this contract is chargeable, and a cash balance otherwise unencumbered in the treasury from which payment is to be made, each sufficient to meet the obligation of $17,878,465.00 which is hereby authorized. Additional funding is subject to appropriation in the County's 2021 and future years' annual budgets.

Date _10-26-2020_

Director of Finance and Purchasing
Account No.

013-1902-56040	$9,307,000.00
013-1902-56661	$2,721,465.00
013-1902-56790	$4,346,802.00
045-1902-56790	$1,503,198.00

PC# 19022020044

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Exhibit A
Investment Summary

The following Investment Summary details the software and services to be delivered by us to you under the Agreement. This Investment Summary is effective as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

TOTAL CONTRACT Summary

Pricing Summary - CAMA Implementation & Appraisal and Reassessment Services

CAMA Implementation

SaaS Fee Year 1	907,155.00	Project Initiation
SaaS Fee Year 2	907,155.00	12 Month Anniversary of Project Initiation
One-Time Professional Services	771,580.00	Invoiced as delivered - Percentage Complete
Travel Expenses	135,575.00	Invoiced as incurred
Sub-Total CAMA Implementation	*2,721,465.00*	

Appraisal & Reassessment Services

Assessment Records	5,850,000.00	Invoiced as Performed
BAFO Discount	(95,000.00)	
Reassessment Services	9,497,000.00	Invoiced as Performed
BAFO Discount	(95,000.00)	
Sub-Total Appraisal & Reassessment Services	*15,157,000.00*	

Contract Total	**17,878,465.00**	

OPTIONAL Tax Implementation

SaaS Fee Year 1	218,385.00	Start of Tax Phase
SaaS Fee Year 2	218,385.00	12 Month Anniversary of Start of Tax Phase
One-Time Professional Services	504,115.00	Invoiced as delivered - Percentage Complete
Travel Expenses	204,065.00	Invoiced as incurred

OPTIONAL Additional Hearing Rates

Informal Hearings	$800 per person day
Board of Equalization & State Tax Commission	$1,000 per person day

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CAMA Investment Summary

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Quoted By:	Troy Fryman	
Date:	8/13/20	REVISED
Quote Expiration:	11/11/20	
Quote Name:	Jackson County, MO	

Sales Quotation For
Jackson County, MO Assessment Department
Jackson County Courthouse, Room G-1
415 East 12 St.
Kansas City, MO 64106

iasWorld Software as a Service

Description	Annual SaaS Fee	BAFO Discount	# Years	Total
Core Software:				
iasWorld CAMA	686,380.00	(34,320.00)	2	1,304,120.00
iasWorld Appeals Tracking	77,290.00	(3,865.00)	2	146,850.00
iasWorld Personal Property	96,640.00	(4,830.00)	2	183,620.00
iasWorld Public Access	53,990.00	(2,700.00)	2	102,580.00
iasWorld SmartFile	40,600.00	(2,030.00)	2	77,140.00
Net Annual SaaS Fee	954,900.00	(47,745.00)		1,814,310.00

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IasWorld Professional Services

Description	Fee
Core Software:	
Project Management	$152,100.00
Install & DBA	$15,000.00
Assess & Define	$40,480.00
Build & Validate	$115,345.00
Reports & Integrations	$21,000.00
Conversion	$90,390.00
Training	$13,800.00
Testing	$27,600.00
Production Cutover	$9,200.00
Post Live Support	$48,500.00
Personal Property	$46,000.00
Inquiry & Appeals	$46,000.00
Public Access	$39,215.00
SmartFile	$65,550.00
TCM	$41,400.00
Core Sub-Total	$771,580.00

SUMMARY	ONE TIME FEES	RECURRING FEES
Core Software		
Total SaaS	$0.00	907,155.00
Total Tyler Services	$771,580.00	$0.00
Total 3rd Party Hardware, Software and Services	$0.00	$0.00
Summary Total	**$771,580.00**	**$907,155.00**
Estimated Travel Expenses	**$135,575.00**	

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

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The assumptions are as follows:
Core Software

Project Duration
Will be solidified after the completion of the Assess & Define stage
The Initial duration estimate is: | 12 | months

Implementation Consultant(s)
Percentage of time Tyler Implementation Consultant(s) are dedicated to this project | 50% |
The amount of time Tyler Implementation Consultant(s) will be onsite will vary dependent on the Project Stage. Resources will be onsite 1 week per month
Note: A working month at 100% dedication is considered 16.5 days per month

Project Management
Percentage of time Tyler Project Manager is dedicated to this project | 50% |
The amount of time Tyler Project Manager will be onsite will vary dependent on the Project Stage. He/she will be onsite 1 week per month

Training
Number of training days Tyler has included: | 15.00 | days
Note: If two (2) Implementation resources are conducting training at the same time on different topics, then this equals two (2) days
Tyler is proposing train-the-trainer education for the Client Power Users to then train their End Users

Production Cutover
Number of onsite days Tyler has included at go-live: | 10 | days
Note: If two (2) Implementation resources are onsite during Production Cutover on the same day, then this equals two (2) days

Post Live Support
Number of hours Tyler has included from the Tyler Project Team to support production activities once live: | 388 | hours
Number of concurrent days the Tyler Project Team will support production activities prior to full transition to Tyler Support: | 90 | days
Note: Post live support hours are time and material pricing and will be invoiced at $125 per hour as incurred
Number of Tyler resources assigned to post live support activities | 3 | person (PM being one)
Percentage of time Tyler resources are dedicated during post live support | 50% |
Note: Post live support will occur during normal hours of operations, which is Monday thru Friday from 8:00 AM to 5:00 PM EST

Customizations
Modifications:
  Maximum core product modifications included in the services | - |
  Maximum custom Forms and Reports included in the services | 1.00 |
  Maximum custom Data Exchanges included in the services | 1.00 |
SmartFile:
  Maximum filings included in the services | 3.00 |
Workflow:
  Maximum workflows included in the services | - |
Note: Up to seven (7) steps within each workflow
Field Mobile:
  Configuration of data event triggers for automated workflow task generation are not in scope.

Conversion
Tyler to work with the County to convert data from the following legacy solution(s): | Sigma |

Travel Expenses
Estimated travel is | $ 135,575.00 |
Travel expenses will be invoiced as incurred per the then current Tyler Travel Policy

Miscellaneous
An onsite week is considered Tuesday thru Thursday. Monday and Friday will be travel days. Tyler resource time for travel days is accounted for from contract time and will reduce days for specific tasks (I.e. Training and Production Cutover)
Tyler to use a base template for the starting to-be solution
Tyler has estimated a number of hours for this project based on size, complexity, and our experience with similar implementations. Tyler will invoice as work is performed. Should out of scope items be identified for this project, Client and Tyler will mutually agree to the effort and impact on the schedule and cost

Additional Comments
1. Tyler will make our APIs available to the County so County resources can write Integrations to their solutions.
2. Custom PRC Included
3. Integration to TR Ascend Included

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Optional Tax Billing & Collection Software

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Quoted By:	Troy Fryman
Date:	8/13/20
Quote Expiration:	11/11/20
Quote Name:	Jackson County, MO

REVISED

Sales Quotation For

Jackson County, MO Assessment Department

Jackson County Courthouse, Room G-1

415 East 12 St.

Kansas City, MO 64106

IasWorld Software as a Service

Description	Annual SaaS Fee	BAFO Discount	# Years	Total
OPTIONAL SOFTWARE				
IasWorld Tax Billing & Collection (incl. Delinquent Tax Collection)	218,385.00	(10,920.00)	2	414,930.00
Net Annual SaaS Fee	218,385.00	(10,920.00)		414,930.00

IasWorld Professional Services

Description	Fee
OPTIONAL SOFTWARE SERVICES	
Project Management	$40,560.00
Install & DBA	$5,000.00
Assess & Define	$48,760.00
Build & Validate	$143,520.00
Conversion	$211,025.00
Training	$13,800.00
Testing	$13,800.00
Production Cutover	$18,400.00
Post Live Support	$9,250.00
Core Sub-Total	$504,115.00

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Optional Software Assumptions

Project Duration
  Will be solidified after the completion of the Assess & Define stage
  The initial duration estimate is: | 16 | months

Implementation Consultant(s)
  Percentage of time Tyler Implementation Consultant(s) are dedicated to this project | 50% |
  The amount of time Tyler Implementation Consultant(s) will be onsite will vary dependent on the Project Stage. Resources will be onsite 1 week per month
  Note: A working month at 100% dedication is considered 16.5 days per month

Project Management
  Percentage of time Tyler Project Manager is dedicated to this project | 50% |
  The amount of time Tyler Project Manager will be onsite will vary dependent on the Project Stage. He/she will be onsite 1 week per month

Training
  Number of training days Tyler has included: | 30.00 | days
  Note: If two (2) Implementation resources are conducting training at the same time on different topics, then this equals two (2) days
        Tyler is proposing train-the-trainer education for the Client Power Users to then train their End Users

Production Cutover
  Number of onsite days Tyler has included at go-live: | 30 | days
  Note: If two (2) Implementation resources are onsite during Production Cutover on the same day, then this equals two (2) days

Post Live Support
  Number of hours Tyler has included from the Tyler Project Team to support production activities once live: | 462 | hours
  Number of concurrent days the Tyler Project Team will support production activities prior to full transition to Tyler Support: | 90 | days
  Note: Post live support hours are time and material pricing and will be invoiced at $125 per hour as incurred
  Number of Tyler resources assigned to post live support activities | 3 | person (PM being one)
  Percentage of time Tyler resources are dedicated during post live support | 50% |
  Note: Post live support will occur during normal hours of operations, which is Monday thru Friday from 8:00 AM to 5:00 PM EST

Customizations
Modifications:
    Maximum core product modifications included in the services | - |
    Maximum custom Forms and Reports included in the services | 1.00 |
    Maximum custom Data Exchanges included in the services | - |
SmartFile:
    Maximum filings included in the services | - |
Workflow:
    Maximum workflows included in the services | - |
Note: Up to seven (7) steps within each workflow
Field Mobile:
    Configuration of data event triggers for automated workflow task generation are not in scope.

Conversion
  Tyler to work with the County to convert data from the following legacy solution(s): | Accend |

Travel Expenses
  Estimated travel is | $ 204,064.00 |
  Travel expenses will be invoiced as incurred per the then current Tyler Travel Policy

Miscellaneous
  An onsite week is considered Tuesday thru Thursday. Monday and Friday will be travel days. Tyler resource time for travel days is accounted for from contract time and will reduce days for specific tasks (i.e. Training and Production Cutover)
  Tyler to use a base template for the starting to-be solution
  Tyler has estimated a number of hours for this project based on size, complexity, and our experience with similar implementations. Tyler will invoice as work is performed. Should out of scope items be identified for this project, Client and Tyler will mutually agree to the effort and impact on the schedule and cost

Additional Comments
  1. Tyler will make our APIs available to the County so County resources can write integrations to their solutions.
  2. Custom Tax bill included

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Maintenance of Assessment Records and Data Investment Summary

Project Task	Fee
Project Start-up	
Project Planning, Software licenses, Local Hiring, Training & Commencement Activities	$292,500.00
1ST Year Activities	
Parcel Inventory Review Residential Improved – 120,000 parcels	
Parcel Inventory Review Residential Vacant Land – 21,000 parcels	
Parcel Inventory Review Agricultural Improved – 3,500 parcels	
Parcel Inventory Review Exempt – 14,000 parcels	
Parcel Inventory Review Commercial – 12,000 parcels	
Occupancy/Permit Review – 6,000 parcels	
New Construction Data Collection – 5,000 parcels	
Sales Verification/Validation – 35,000 parcels	
1st Year Activities Fee	$3,167,775.00
Total Fee Year 1	**$3,460,275.00**
2nd Year Activities	
Parcel Inventory Review Residential Improved – 120,000 parcels	
Parcel Inventory Review Residential Vacant Land – 21,000	
Parcel Inventory Review Agricultural Improved – 3,500 parcels	
Parcel Inventory Review Exempt – 14,000 parcels	
Parcel Inventory Review Commercial – 12,000 parcels	
Occupancy/Permit Review – 6,000 parcels	
New Construction Data Collection – 5,000 parcels	
Sales Verification/Validation – 35,000	
2nd Year Activities Fee	$2,389,725.00
Total 2 Year Fee	**$5,850,000.00**

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Reassessment Services Investment Summary

Description	Cost Per Parcel
Commercial Improved/Exempt	$99.90
Commercial Vacant Land	$ 6.96
Residential Improved	$21.98
Residential Vacant Land	$ 6.96
Agricultural Improved	$28.94
Agricultural Vacant Land	$16.70
Total extended proposed cost – Reassessment Services	$9,497,000.00

Total Assessment Services Cost

Project	Total Cost
Assessment Records	$5,850,000.00
Reassessment Services	$9,497,000.00
BAFO Discount	($190,000.00)
Grand total cost for complete data collection, reassessment, new construction and sales verification.	$15,157,000.00

The cost identified in this Agreement is based on the parcel counts included in Exhibit D Table 1: Jackson County parcel count breakdown. Per parcel rates for improved parcels in excess of 101% of these counts are as follows:

Residential	$50.00
Agricultural	$ 75.00
Commercial	$100.00
Industrial	$200.00
Exempt	$100.00
Farm	$ 75.00
Vacant/Ground	$ 5.00
Public Utility	$100.00

All appraisal services associated with improved parcels in excess of 101% of the parcels counts included in Exhibit D Table 2: Jackson County parcel count breakdown shall use the overage rates above and will be invoiced as additional professional services as set forth in Exhibit B 1.1. No provision of services that may require additional sums above these Base Contract Amounts shall be performed by Tyler without written consent of the County.

Additional Appeal Support
The base contract fee includes the following related to appeal days (person days)
- 850 Residential informal appeal days
- 250 Commercial informal appeal days
- 50 Residential formal appeal days (BOE & State Tax Commission)
- 100 Commercial formal appeal days (BOE & State Tax Commission)

Additional requested days will be invoiced at the following rates:
- Informal Hearings - $800 per person day (including travel costs)
- Board of Equalization & State Tax Commission - $1,000 per person day (including travel costs)

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Exhibit B
Invoicing and Payment Policy

We will provide you with the software and services set forth in the Investment Summary of the Agreement. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

Invoicing: We will invoice you for the applicable software and services in the Investment Summary as set forth below. Your rights to dispute any invoice are set forth in the Agreement.

1. <u>SaaS Fees</u>. SaaS Fees are invoiced on an annual basis, beginning on the commencement of the initial term as set forth in Section F (1) of this Agreement. Your annual SaaS fees for the initial term are set forth in the Investment Summary. Upon expiration of the initial term, your annual SaaS fees will be at our then-current rates. The foregoing notwithstanding, Tyler agrees not to increase annual SaaS Fees for the first one (1) year renewal term following expiration of the initial term.

2. <u>Other Tyler Software and Services</u>.

   2.1 VPN Device: The fee for the VPN device is included in the SaaS Fees and will be invoiced as set forth above in Section 1.

   2.2 Implementation and Other Professional Services (including training): Implementation Services and other professional services (including training) are billed and invoiced as delivered based on a percentage of completion each month, at the rates set forth in the Investment Summary. Appraisal Services will be invoiced as performed.

3. <u>Third Party Products</u>.

   3.1 Third Party Software License Fees: License fees for Third Party Software, if any, are invoiced when we make it available to you for downloading.

   3.2 Third Party Software Maintenance: The first year maintenance for the Third Party Software is included in the cost of the Third Party Software License Fees. Future year's Third Party Software Maintenance fees will be invoiced annually in advance on each anniversary of the Project Initiation Date.

   3.3 Third Party Hardware: Third Party Hardware costs, if any, are invoiced upon delivery.

   3.4 Third Party Services: Fees for Third Party Services, if any, are invoiced as delivered, along with applicable expenses, at the rates set forth in the Investment Summary.

4. <u>Expenses</u>. The service rates in the Investment Summary do not include travel expenses.

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Expenses for Tyler delivered services will be billed as incurred and only in accordance with our then-current Business Travel Policy, plus a 10% travel agency processing fee. Our current Business Travel Policy is attached to this Exhibit B at Schedule 1. Copies of receipts will be provided upon request; we reserve the right to charge you an administrative fee depending on the extent of your requests. Receipts for miscellaneous items less than twenty-five dollars and mileage logs are not available.

Payment. Payment for undisputed invoices is due within forty-five (45) days of the invoice date. We prefer to receive payments electronically. Our electronic payment information is available by contacting AR@tylertech.com.

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**Exhibit B
Schedule 1
Business Travel Policy**

1. Air Travel

   A. Reservations & Tickets

   The Travel Management Company (TMC) used by Tyler will provide an employee with a direct flight within two hours before or after the requested departure time, assuming that flight does not add more than three hours to the employee's total trip duration and the fare is within $100 (each way) of the lowest logical fare. If a net savings of $200 or more (each way) is possible through a connecting flight that is within two hours before or after the requested departure time and that does not add more than three hours to the employee's total trip duration, the connecting flight should be accepted.

   Employees are encouraged to make advanced reservations to take full advantage of discount opportunities. Employees should use all reasonable efforts to make travel arrangements at least two (2) weeks in advance of commitments. A seven (7) day advance booking requirement is mandatory. When booking less than seven (7) days in advance, management approval will be required.

   Except in the case of international travel where a segment of continuous air travel is six (6) or more consecutive hours in length, only economy or coach class seating is reimbursable. Employees shall not be reimbursed for "Basic Economy Fares" because these fares are non-refundable and have many restrictions that outweigh the cost-savings.

   B. Baggage Fees

   Reimbursement of personal baggage charges are based on trip duration as follows:

   - Up to five (5) days = one (1) checked bag
   - Six (6) or more days = two (2) checked bags

   Baggage fees for sports equipment are not reimbursable.

2. Ground Transportation

   A. Private Automobile

   Mileage Allowance – Business use of an employee's private automobile will be reimbursed at

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the current IRS allowable rate, plus out of pocket costs for tolls and parking. Mileage will be calculated by using the employee's office as the starting and ending point, in compliance with IRS regulations. Employees who have been designated a home office should calculate miles from their home.

B. Rental Car

Employees are authorized to rent cars only in conjunction with air travel when cost, convenience, and the specific situation reasonably require their use. When renting a car for Tyler business, employees should select a "mid-size" or "intermediate" car. "Full" size cars may be rented when three or more employees are traveling together. Tyler carries leased vehicle coverage for business car rentals; except for employees traveling to Alaska and internationally (excluding Canada), additional insurance on the rental agreement should be declined.

C. Public Transportation

Taxi or airport limousine services may be considered when traveling in and around cities or to and from airports when less expensive means of transportation are unavailable or impractical. The actual fare plus a reasonable tip (15-18%) are reimbursable. In the case of a free hotel shuttle to the airport, tips are included in the per diem rates and will not be reimbursed separately.

D. Parking & Tolls

When parking at the airport, employees must use longer term parking areas that are measured in days as opposed to hours. Park and fly options located near some airports may also be used. For extended trips that would result in excessive parking charges, public transportation to/from the airport should be considered. Tolls will be reimbursed when receipts are presented.

3. Lodging

Tyler's TMC will select hotel chains that are well established, reasonable in price, and conveniently located in relation to the traveler's work assignment. Typical hotel chains include Courtyard, Fairfield Inn, Hampton Inn, and Holiday Inn Express. If the employee has a discount rate with a local hotel, the hotel reservation should note that discount and the employee should confirm the lower rate with the hotel upon arrival. Employee memberships in travel clubs such as AAA should be noted in their travel profiles so that the employee can take advantage of any lower club rates.

"No shows" or cancellation fees are not reimbursable if the employee does not comply with the hotel's cancellation policy.

Tips for maids and other hotel staff are included in the per diem rate and are not reimbursed separately.

Employees are not authorized to reserve non-traditional short-term lodging, such as Airbnb, VRBO, and HomeAway. Employees who elect to make such reservations shall not be

reimbursed.

4. Meals and Incidental Expenses

Employee meals and incidental expenses while on travel status within the continental U.S. are in accordance with the federal per diem rates published by the General Services Administration. Incidental expenses include tips to maids, hotel staff, and shuttle drivers and other minor travel expenses. Per diem rates are available at www.gsa.gov/perdiem.

Per diem for Alaska, Hawaii, U.S. protectorates and international destinations are provided separately by the Department of State and will be determined as required.

A. Overnight Travel

For each full day of travel, all three meals are reimbursable. Per diems on the first and last day of a trip are governed as set forth below.

Departure Day

Depart before 12:00 noon   Lunch and dinner
Depart after 12:00 noon   Dinner

Return Day

Return before 12:00 noon   Breakfast
Return between 12:00 noon & 7:00 p.m.   Breakfast and lunch
Return after 7:00 p.m.*   Breakfast, lunch and dinner

*7:00 p.m. is defined as direct travel time and does not include time taken to stop for dinner.

The reimbursement rates for individual meals are calculated as a percentage of the full day per diem as follows:

Breakfast	15%
Lunch	25%
Dinner	60%

B. Same Day Travel

Employees traveling at least 100 miles to a site and returning in the same day are eligible to claim lunch on an expense report. Employees on same day travel status are eligible to claim dinner in the event they return home after 7:00 p.m.*

*7:00 p.m. is defined as direct travel time and does not include time taken to stop for dinner.

5. Internet Access – Hotels and Airports

    Employees who travel may need to access their e-mail at night. Many hotels provide free high speed internet access and Tyler employees are encouraged to use such hotels whenever possible. If an employee's hotel charges for internet access it is reimbursable up to $10.00 per day. Charges for internet access at airports are not reimbursable.

6. International Travel

    All international flights with the exception of flights between the U.S. and Canada should be reserved through TMC using the "lowest practical coach fare" with the exception of flights that are six (6) or more consecutive hours in length. In such event, the next available seating class above coach shall be reimbursed.

    When required to travel internationally for business, employees shall be reimbursed for photo fees, application fees, and execution fees when obtaining a new passport book, but fees related to passport renewals are not reimbursable. Visa application and legal fees, entry taxes and departure taxes are reimbursable.

    The cost of vaccinations that are either required for travel to specific countries or suggested by the U.S. Department of Health & Human Services for travel to specific countries, is reimbursable.

    Section 4, Meals & Incidental Expenses, and Section 2.b., Rental Car, shall apply to this section.

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Exhibit C

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Exhibit C
Service Level Agreement

I.   Agreement Overview

This SLA operates in conjunction with, and does not supersede or replace any part of, the Agreement. It outlines the information technology service levels that we will provide to you to ensure the availability of the application services that you have requested us to provide. All other support services are documented in the Support Call Process.

II.   Definitions. Except as defined below, all defined terms have the meaning set forth in the Agreement.

Attainment: The percentage of time the Tyler Software is available during a calendar quarter, with percentages rounded to the nearest whole number.

Client Error Incident: Any service unavailability resulting from your applications, content or equipment, or the acts or omissions of any of your service users or third-party providers over whom we exercise no control.

Downtime: Those minutes during which the Tyler Software is not available for your use. Downtime does not include those instances in which only a Defect is present.

Service Availability: The total number of minutes in a calendar quarter that the Tyler Software is capable of receiving, processing, and responding to requests, excluding maintenance windows, Client Error Incidents and Force Majeure.

III.   Service Availability

The Service Availability of the Tyler Software is intended to be 24/7/365. We set Service Availability goals and measures whether we have met those goals by tracking Attainment.

a.   Your Responsibilities

Whenever you experience Downtime, you must make a support call according to the procedures outlined in the Support Call Process. You will receive a support incident number.

You must document, in writing, all Downtime that you have experienced during a calendar quarter. You must deliver such documentation to us within 30 days of a quarter's end.

The documentation you provide must evidence the Downtime clearly and convincingly. It must include, for example, the support incident number(s) and the date, time and duration of the Downtime(s).

b.   Our Responsibilities

When our support team receives a call from you that Downtime has occurred or is occurring, we will work with you to identify the cause of the Downtime (including whether it may be the result of a Client Error Incident or Force Majeure). We will also work with you to resume normal operations.

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Upon timely receipt of your Downtime report, we will compare that report to our own outage logs and support tickets to confirm that Downtime for which we were responsible indeed occurred.

We will respond to your Downtime report within 30 day(s) of receipt. To the extent we have confirmed Downtime for which we are responsible, we will provide you with the relief set forth below.

c.   Client Relief

When a Service Availability goal is not met due to confirmed Downtime, we will provide you with relief that corresponds to the percentage amount by which that goal was not achieved, as set forth in the Client Relief Schedule below.

Notwithstanding the above, the total amount of all relief that would be due under this SLA per quarter will not exceed 5% of one quarter of the then-current SaaS Fee. The total credits confirmed by us in one or more quarters of a billing cycle will be applied to the SaaS Fee for the next billing cycle. Issuing of such credit does not relieve us of our obligations under the Agreement to correct the problem which created the service interruption.

Every quarter, we will compare confirmed Downtime to Service Availability. In the event actual Attainment does not meet the targeted Attainment, the following Client relief will apply, on a quarterly basis:

Targeted Attainment	Actual Attainment	Client Relief
100%	98-99%	Remedial action will be taken.
100%	95-97%	4% credit of fee for affected calendar quarter will be posted to next billing cycle
100%	<95%	5% credit of fee for affected calendar quarter will be posted to next billing cycle

You may request a report from us that documents the preceding quarter's Service Availability, Downtime, any remedial actions that have been/will be taken, and any credits that may be issued.

IV.   Applicability

The commitments set forth in this SLA do not apply during maintenance windows, Client Error Incidents, and Force Majeure.

We perform maintenance during limited windows that are historically known to be reliably low-traffic times. If and when maintenance is predicted to occur during periods of higher traffic, we will provide advance notice of those windows and will coordinate to the greatest extent possible with you.

V.   Force Majeure

You will not hold us responsible for not meeting service levels outlined in this SLA to the extent any failure to do so is caused by Force Majeure. In the event of Force Majeure, we will file with you a signed request that said failure be excused. That writing will at least include the essential details and circumstances supporting our request for relief pursuant to this Section. You will not unreasonably withhold its acceptance of such a request.

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Support Call Process

Scope of Maintenance and Support Services

The following outlines the standard support provided by Tyler Technologies, Inc. ("Tyler") for the following software systems installed in the Tyler hosting center, for the time period specified in this Support Call Process ("Support Agreement").

The software systems listed in Exhibit A – Investment Summary running in the Tyler hosting center shall be known as the Tyler Software. Any additional support, modifications, or services needed on the Tyler Software as it is installed in the Tyler hosting center which are not expressly included in this Support Agreement, must be outlined in an additional service level agreement or will be provided at time and materials rates.

Modifications to the Tyler Software code and reports written by us for a specific jurisdiction or group of jurisdictions are considered part of the Tyler Software and, as such, the terms of this Support Agreement apply.

1. Terms and Definitions

The following is a list of common terms used in this Support Agreement:

1.1 Business Day(s)

The days and hours Tyler operates, defined as Monday through Friday (excluding holidays) between the hours of 8:00 AM and 5:00 P.M. ET. Tyler's current holiday schedules is as follows: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve, Christmas Day.

1.2 Coverage Period

The start and end date for the support offered in this Support Agreement.

1.3 Maintenance or Maintain

Providing support and Updates for the Tyler Software only.

1.4 System Error

An error in the Tyler Software that is either a generated error (e.g., error screen) by the Tyler Software or lack of response (slow or stuck), or failure of a function as stated in the iasWorld user guides (also referred to as "issues" or "bugs"). Note: A Client Error Incident is not covered.

1.5 Updates

Unlimited revisions to the Tyler Software source code that fixes errors and/or includes enhancements that are made available to the Client. Updates include releases (e.g., new functionality or content)

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and patches (e.g., bug fixes).

1.6 VPN

The use of any secure connection on the Client system from any Tyler office.

2. Hot Line Support

During the Coverage Period, Tyler will provide phone support for the Tyler Software. This support will provide assistance (via phone or delivered documentation) in determining the root cause of System Errors and the response as outlined in item 2.3 below, subject to Section 9 of this Support Agreement. The Hot Line is also available for questions on normal operation of the Tyler Software.

2.1. Hot Line Number

800-800-2581 extension 1

2.2. Hot Line Hours

The Hot Line is available from 8:00 A.M. to 5:00 P.M.ET, Monday through Friday. Weekend or evening coverage can be arranged with a five (5) day minimum notice. This special coverage could be billed under the conditions stated in Section 13 of this Support Agreement.

2.3. Hot Line Support Considerations

Tyler shall respond to the Client's request for telephone assistance within one (1) working hour from the initial call.

Tyler shall take steps to have the System Error fixed, or an appropriate workaround, via phone or remote connection as defined in the following priority matrix:

Priority	Definition	Response	Resolution SLA
Critical	Software is inoperable for a significant number of Client users.	Client is contacted within 1 hour.	Within 1 business day or an agreed upon due date and time.
High	Issue affects daily processing or day-to-day functions of the Client. Issue affects a large group of Client users.	Client is contacted within 1 hour.	Within 2-5 business days or an agreed upon due date.
Medium	Issue affects a small group of users and does not affect day-to-day processing.	Client is contacted within 1 hour.	Within 4 – 10 business days, or an agreed upon due date.
Non-Critical	Issue affects 1 Client user and is non-critical to daily processing.	Client is contacted within 1 hour.	Typically 6+ business days from reported problem, or an agreed upon due date.

If the cause of the problem is related to an item in Section 12 of this Support Agreement or not an actual bug within the Tyler Software, Tyler will provide an action plan with an estimated cost to resolve the issue within a reasonable amount of time.

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3. Online Support

During the Coverage Period, Tyler will provide access to Tyler's Customer Relationship Management System in order for the Client to have twenty-four (24) hour per day, seven (7) day per week access to answers to Tyler Software questions and to log Tyler Software issues.

4. Modification and Change Procedure

Changes to the Tyler Software (not directed by local laws pursuant to Section 6 of this Support Agreement) can be requested. These changes shall be submitted in writing to Tyler and cost estimates will be provided. Once the Client agrees to the cost estimate, a separate addendum or agreement will be drafted for acceptance by the parties.

5. Updates

Tyler Software Updates will be made available during the Coverage Period.

5.1. iasWorld Updates

Tyler staff will schedule the release of new Updates into the Client's test and production environments with your staff. Tyler will distribute an estimated schedule of when Updates will be available. Tyler performs such Updates, in coordination with your staff, as agreed upon. It is important that any Updates be done in a timely manner as the Update could contain fixes for one or more System Errors. Tyler reserves the right to back-port certain bug fixes to the Client's current version of the Tyler Software or require that the Client upgrade to a newer release to obtain the required fix.

5.2. iasWorld Data Tables

The Client is responsible for updating any data stored in the Tyler Software data tables, whether such updates occur through the normal course of business from user data entry, through update from some iasWorld batch process, or through an SQL update. Updates may be performed to the iasWorld data for various reasons by Tyler as requested by the Client subject to time and materials rates.

5.3. Operating System Updates

Tyler will be maintaining the server hardware environment, including updates to the Operating System.

5.4. Oracle Updates

Tyler will be responsible for scheduling updates to the Oracle software in order that the Client is on a version supported by Oracle.

6. Legislative Changes

Tyler will provide up to eighty (80) Tyler Software programming hours per state per calendar year of this Support Agreement in order to comply with legislative changes. Programming hours encompass analysis, coding, and testing of the changes. Additional legislative changes can be performed at time and materials rates. In addition to the eighty (80) hours included for legislative changes the Client will have an additional eighty (80) hours to use for additional services as needed. These hours need to be communicated to the Client's Client Manager by October 1 of each annual hosting term and do not roll over to the next term.

7. Data Ownership

The Client owns the data stored and processed on the Tyler Software. While performing support

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services pursuant to this Support Agreement, Tyler will be exposed to this data and will take industry standard measures to ensure the confidentiality of the data.

8. Backups and Recovery

Backups of the Client environment will occur in accordance with the Tyler hosting center's normal business process.

9. Dependent Software Licenses

The Client is responsible for acquiring and maintaining software licenses and upgrades for all third-party software products that integrate with the Tyler Software and are not included in the Tyler environment including, but not limited to, Adobe, ESRI, EDMS, Microsoft Office, etc.

10. Server Operations

Tyler will be responsible for operational support of the iasWorld application server(s) within the Tyler environment. Tasks will include performing system backups, system restarts, and troubleshooting assistance to Tyler staff.

11. Remote Access

The Client will provide Tyler with the means to electronically connect to the Client and to the iasWorld application, to enable software transfers, electronic correspondence, and remote troubleshooting. The preferred remote connection is via the Internet.

12. Out of Scope Items

The following are examples of items that are **not** included in this Support Agreement. Tyler will provide such services as requested by the Client. Time and Materials rates will apply for such services. They are:

12.1. Resolution of problems that arise out of the Client's misuse of the Tyler Software.

12.2. Creating ad hoc reports or new iasWorld reports.

12.3. Modification of the iasWorld code.

12.4. Modification of iasWorld reports.

12.5. Updates to iasWorld cost tables, tax rate tables, etc.

12.6. Onsite training.

12.7. Process and procedures that could otherwise be performed by a non-technical iasWorld user during the Client's business cycle.

12.8. Errors and problems that arise out of the Client's modification of the Tyler Software code.

12.9. Errors and problems related to other 3rd party vendors' software not specifically covered by this Support Agreement.

13. Additional Support

No other additional support outside this Support Agreement is given unless stated in the Software as a Service Agreement. Additional support or services (such as those listed in Section 12 of this Support

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Agreement) can be requested and will be billed at Tyler's then prevailing time and materials rates.

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Exhibit D
Statement of Work

The following Statement of Work details the services to be delivered by us to you under your Agreement. This Statement of Work is effective as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

[Remainder of page blank]

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Statement of Work

Tyler Technologies

Prepared for:

Jackson County
Jackson County Assessment Department
415 East 12 Street
Kansas City, MO 64106

Prepared by:

Troy Fryman
One Tyler Way, Moraine, OH 45439
Tyler Technologies, Inc.
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Executive Summary

Project Overview

The Statement of Work (SOW) documents the Project Scope, methodology, roles and responsibilities, implementation Stages, and deliverables for the implementation of Tyler products.

The Project goals are to offer Jackson County the opportunity to make the County more accessible and responsive to external and internal customer needs and more efficient in its operations through:

Streamlining, automating, and integrating business processes and practices
Providing tools to produce and access information in a real-time environment
Enabling and empowering users to become more efficient, productive and responsive
Successfully overcoming current challenges and meeting future goals

Product Summary

Below, is a summary of the products included in this Project, as well as reference to the County's functional area utilizing the Tyler product(s). Refer to the Implementation Stages section of this SOW for information containing detailed service components.

[PRODUCT]	[APPLICATION]
iasWorld	CAMA
iasWorld	Appeals Tracking
iasWorld	Personal Property
iasWorld	Public Access
iasWorld	SmartFIle

[OPTIONAL PRODUCT]	[OPTIONAL APPLICATION]
iasWorld	Tax Billing & Collection
iasWorld	Delinquent Tax Collectoin

Project Timeline

The Project Timeline establishes a start and end date for each Phase of the Project. Developed during the Initiate & Plan Stage and revised as mutually agreed to, if needed, the timeline accounts for resource availability, business goals, size and complexity of the Project, and task duration requirements.

Project Methodology Overview

Tyler bases its implementation methodology on the Project Management Institute's (PMI) Process Groups (Initiating, Planning, Executing, Monitoring & Controlling, and Closing). Using this model, Tyler developed a 6-stage process specifically designed to focus on critical project success measurement factors.

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

Project Governance

The purpose of this section is to define the resources required to adequately establish the business needs, objectives, and priorities for the Project; communicate the goals to other project participants; and provide support and guidance to accomplish these goals. Project governance also defines the structure for issue escalation and resolution, Change Control review and authority, and organizational Change Management activities.

The preliminary governance structure establishes a clear escalation path when issues and risks require escalation above the project manager level. Further refinement of the governance structure, related processes, and specific roles and responsibilities occurs during the Initiate & Plan Stage.

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

Client Governance

Depending on the County's organizational structure and size, the following governance roles may be filled by one or more people:

1.1.1 Client Project Manager

The County's project manager(s) coordinate project team members, subject matter experts, and the overall implementation schedule and serves as the primary point of contact with Tyler. The County project manager(s) will be responsible for reporting to the County steering committee and determining appropriate escalation points.

1.1.2 Steering Committee

The County steering committee understands and supports the cultural change necessary for the Project and fosters an appreciation of the Project's value throughout the organization. Oversees the County project manager(s) and the Project and through participation in regular internal meetings, the County steering committee remains updated on all project progress, project decisions, and achievement of project milestones. The County steering committee also provides support to the County project manager(s) by communicating the importance of the Project to all impacted departments. The County steering committee is responsible for ensuring the Project has appropriate resources, provides strategic direction to the project team, for making timely decisions on critical project issues or policy decisions. The County steering committee also serves as primary level of issue resolution for the Project.

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1.1.3 Executive Sponsor(s)

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

Tyler Governance

1.1.4 Tyler Project Manager

The Tyler project manager(s) have direct involvement with the Project and coordinates Tyler project team members, subject matter experts, the overall implementation schedule, and serves as the primary point of contact with the County. As requested by the County, the Tyler project manager(s) provide regular updates to the County's steering committee and other Tyler governance members.

1.1.5 Tyler Implementation Management

Tyler implementation management has indirect involvement with the Project and is part of the Tyler escalation process. Tyler project manager(s) consult implementation management on issues and outstanding decisions critical to the Project. Implementation management works toward a solution with the Tyler project manager(s) or with the County management, as appropriate. Tyler executive management is the escalation point for any issues not resolved at this level. The name(s) and contact information for this resource will be provided and available to the project team.

1.1.6 Tyler Executive Management

Tyler executive management has indirect involvement with the Project and is part of the Tyler escalation process. This team member offers additional support to the project team and collaborates with other Tyler department managers, as needed, in order to escalate and facilitate implementation project tasks and decisions. The name(s) and contact information for this resource will be provided and available to the project team.

Acceptance and Acknowledgment Process

All Deliverables and Control Points must be accepted or acknowledged following the process below. Acceptance requires a formal sign-off while acknowledgement may be provided without formal sign-off at the time of delivery. The following process will be used for accepting or acknowledging Deliverables and Control Points:

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- The County shall have five (5) business days from the date of delivery, or as otherwise mutually agreed upon by the parties in writing, to accept or acknowledge each Deliverable or Control Point. If the County does not provide acceptance or acknowledgement within five (5) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deems the Deliverable or Control Point as accepted.

- If the County does not agree the particular Deliverable or Control Point meets requirements, the County shall notify Tyler project manager(s), in writing, with reasoning within five (5) business days, or the otherwise agreed-upon timeframe, not to be unreasonably withheld, of receipt of the Deliverable.

- Tyler shall address any deficiencies and redeliver the Deliverable or Control Point. The County shall then have two (2) business days from receipt of the redelivered Deliverable or Control Point to accept or again submit written notification of reasons for rejecting the milestone. If the County does not provide acceptance or acknowledgement within two (2) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deems the Deliverable or Control Point as accepted.

Overall Project Assumptions

Project, Resources and Scheduling

- The County has the ability to allocate additional internal resources if needed. The County also ensures the alignment of their budget and Scope expectations.

- Tyler and County provide adequate resources to support the efforts to complete the Project as scheduled and within the constraints of the Project budget.

- Abbreviated timelines and overlapped Phases can result in Project delays if there are not sufficient resources assigned to complete all required work as scheduled.

- Changes to Project Plan, availability of resources or changes in Scope may result in schedule delays, which may result in additional charges to the Project.

- Tyler provides a written agenda and notice of any prerequisites to the County project manager(s) five (5) business days prior to any scheduled on site or remote sessions.

- Tyler provides notice of any prerequisites to the County project manager(s) a minimum of ten (10) business days prior to any key deliverable due dates.

- County users complete prerequisites prior to applicable scheduled activities.

- Tyler provides guidance for configuration and processing options available within the Tyler software. The County is responsible for making decisions based on the options available.

- The County will modify current business policies as needed during the course of this project to conform to standard iasWorld business processes.

- In the event the County elects to add and/or modify current business policies during the course of this Project, such policy changes are solely the County's responsibility to define, document, and implement.

- The County makes timely Project related decisions in order to achieve scheduled due dates on tasks and prepare for subsequent training sessions. Decisions left unmade may affect the schedule, as each analysis and implementation session builds on the decisions made in prior sessions.

- Tyler considers additional services out of Scope and requires additional time and costs be requested via Change Request approved through the Change Control process.

- The County will respond to information requests in a comprehensive and timely manner, in accordance with the Project Plan.

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Data Conversion

- The County is readily able to produce the data files needed for conversion from the Legacy System in order to provide them to Tyler on the specified due date(s).

- Each Legacy System data file submitted for conversion includes all associated records in a single approved file layout.

- The County understands the Legacy System data extract(s) must be provided to Tyler in the same format each time unless changes are mutually agreed upon in advance. If not, negative impacts to the schedule, budget, and resource availability may occur and/or data in the new system may be incorrect.

- During this process, the County may need to correct data scenarios in the Legacy System prior to the final data pull. This is a complex activity and requires due diligence by the County to ensure all data pulled includes all required data and the Tyler system contains properly mapped data.

- Tyler will convert current plus **9 years** of history from the current legacy CAMA data. Tyler will convert the same fields for each of the 10 years.

- Data Conversion will consist of converting legacy data to populate iasWorld required fields and required data for use in required State reporting.

Data Exchanges, Modifications, Forms and Reports

- The County ensures the 3rd party data received conforms to a Tyler standard format.

- The 3rd party possesses the knowledge of how to program their portion of the interaction and understands how to manipulate the data received.

- Client is on a supported, compatible version of the 3rd party software or Tyler standard Data Exchange tools may not be available.

- Tyler will implement the iasWorld Missouri base system. The County is willing to make reasonable business process changes rather than expecting the product to conform to every aspect of their current system/process.

- **There is (1) Custom Report, (1) Data Exchange and (0) system modifications considered in Scope for this agreement.** Modifications requested after contract signing have the potential to change cost, Scope, schedule, and production dates for project Phases. Modification requests not in Scope must follow the Project Change Request process.

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Hardware and Software

- Tyler will initially install the most current generally available version of the purchased Tyler software.

- The County will provide network access for Tyler modules, printers, and Internet access to all applicable County and Tyler project staff.

- The County has in place all hardware, software, and technical infrastructure necessary to support the Project.

- The County's system hardware and software meet Tyler standards to ensure sufficient speed and operability of Tyler software. Tyler will not support use of software if the County does not meet minimum standards of Tyler's published specifications.

Education

- Throughout the Project lifecycle, the County provides a training room for Tyler staff to transfer knowledge to the County's resources, for both onsite and remote sessions. The County will provide staff with a location to practice what they have learned without distraction. If Phases overlap, the County will provide multiple training facilities to allow for independent sessions scheduling without conflict.

- The training room is set up in a classroom setting. The County determines the number of workstations in the room. Tyler recommends every person attending a scheduled session with a Tyler Consultant or Trainer have their own workstation. However, Tyler requires there be no more than two (2) people at a given workstation.

- The County provides a workstation which connects to the Tyler system for the Tyler trainer conducting the session. The computer connects to a County provided projector, allowing all attendees the ability to actively engage in the training session.

- The County testing database contains the Tyler software version required for delivery of the Modification prior to the scheduled delivery date for testing.

- The County is responsible for verifying the performance of the Modification as defined by the specification.

- Users performing user acceptance testing (UAT) have attended all applicable training sessions prior to performing UAT.

- There are **(3) weeks** of Power User Training included. As an example if (2) Tyler staff members are teaching (2) training tracks in the same week it counts as (2) weeks of training.

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Implementation Stages

Work Breakdown Structure (WBS)

The Work Breakdown Structure (WBS) is a hierarchical representation of a Project or Phase broken down into smaller, more manageable components. The top-level components are called "Stages" and the second level components are called "work packages." The work packages, shown below each Stage, contain the high-level work to be done. The detailed Project Plan, developed during Initiate & Plan and finalized during Assess & Define, will list the tasks to be completed within each work package. Each Stage ends with a "Control Point", confirming the work performed during that Stage of the Project.

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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 Modification 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 Modification 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

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1.2 Initiate & Plan (Stage 1)

The Initiate & Plan Stage creates a foundation for the Project through identification of County and Tyler Project Management teams, development of implementation management plans, and the provision and discussion of system infrastructure requirements. County participation in gathering information is critical. Tyler Project Management teams present initial plans to stakeholder teams at Stage end.

1.2.1 Tyler Internal Coordination & Planning

Prior to Project commencement, Tyler management staff assigns Project Manager(s). Tyler provides the County with initial project documents used in gathering basic information, which aids in preliminary planning and scheduling. County participation in gathering requested information by provided deadlines ensures the Project moves forward in a timely fashion. Internally, the Tyler Project Manager(s) coordinate with Sales to ensure transfer of vital information from the sales process prior to scheduling a Project Planning Meeting with the County's team. During this step, Tyler will work with the Client to establish the date(s) for the Project/Phase Planning session.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

RACI DEFINITION KEY: Responsible – the person who will be completing the task; Accountable – The person who is ultimately accountable for decisions being made on a task; Consulted – Anyone who must be consulted with prior to a decision being made and/or the task being completed; Informed – Anyone who will be updated when decisions are made or a task is completed

STAGE 1	Tyler Internal Coordination & Planning																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Assign Tyler Project Manager	A	R	I						I			I								
Provide initial project documents (welcome packet) to Client		A	R					C				I								
Sales team to Implementation team knowledge transfer		A	R					C												
Internal planning and Phase coordination		A	R	C	C	C	C													

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1.2.2 System Infrastructure Planning

The County provides, purchases or acquires hardware according to hardware specifications provided by Tyler and ensures it is available at the County's site. The County completes the system infrastructure audit, ensuring vital system infrastructure information is available to the Tyler implementation team, and verifies all hardware compatibility with Tyler solutions.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 1	System Infrastructure Planning																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Provide system hardware specifications		I						R	A			I						C		
Install system hardware, if applicable			I					C				A						R		
Complete system infrastructure audit			I					C				A						R		

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1.2.3 Project/Phase Planning

Project and Phase planning provides an opportunity to review the contract, software, data conversions and services purchased, identify Applications to implement in each Phase (if applicable), and discuss implementation timeframes. The Tyler Project Manager(s) deliver an Implementation Management Plan, which is mutually agreeable by the County and Tyler. The Implementation Management Plan will consist of five (5) main areas; the Scope Management Plan, Communication Plan, Resource Management Plan, Quality Management Plan, and the Risk Management Plan.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 1	Project/Phase Planning																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Perform Project/Phase Planning		A	R							I		C	C			I				
Create Implementation Management Plan		A	R							I		C	C	I		I				
Deliver Implementation Management Plan		A	R									C	C	I						
Review Implementation Management Plan			C							A	R	C	I							

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1.2.4 Project Plan

Client and Tyler will mutually develop an initial project schedule. The initial project schedule includes, at minimum, enough detail to begin project activities while the detailed Project Plan is being developed and refined. The tasks within the initial project schedule will be incorporated into the Project Plan. The Project Plan will be the detailed task lists expanding on the general tasks documented in the RACI tables of this SOW. The Project Plan is a living document and will be updated quarterly with the detailed tasks for the next future quarter; only high-level tasks with rough timeframes will be plotted out beyond this.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 1	Project Plan																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Mutually develop initial project schedule		A	R	I								C	I	I						
Deliver initial project schedule		A	R	I						I	I	C	C	I	I	I				
Develop Project Plan		A	R	I								C	I	I						
Deliver Project Plan for project Phase		A	R	I						I	I	C	C	I	I	I				
Client reviews Project Plan			C							I	A	R	C	C		C				
Client approves Project Plan			I								A	R	C	C	I	I		I	I	I

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1.2.5 Stakeholder Presentation

The County stakeholders join Tyler Project Management to communicate successful project criteria, project goals, Deliverables, a high-level milestone schedule, and roles and responsibilities of project participants.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 1	Stakeholder Presentation(s)																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Tyler & County Project Managers to determine the quantity and audience of the presentations		A	R									C								
Present overview of project Deliverables, schedule and roles and responsibilities		A	R	I				I		I	I	C	I	I	I	I		I	I	I
Communicate successful project criteria and goals			I							R	C	A	C	I	I	C	I	I		

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1.2.6 Control Point 1: Initiate & Plan Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below. Advancement to the Assess & Define Stage is dependent upon Tyler's receipt of the Stage Acceptance.

Initiate & Plan Stage Deliverables

Implementation Management Plan

Objective: Update and deliver baseline management plans to reflect the approach to the County's Project

Scope: The Implementation Management Plan addresses how communication, quality control, risks/issues, resources and schedules, and Software Upgrades (if applicable) will be managed throughout the lifecycle of the Project

Acceptance criteria: The County reviews and acknowledges receipt of Implementation Management Plan

Project Plan

Objective: Provide a comprehensive list of tasks, timelines and assignments related to the Deliverables of the Project

Scope: Task list, assignments and due dates

Acceptance criteria: The County acceptance of Project Plan based on County resource availability and project budget and goals

Initiate & Plan Stage Control Point Acceptance Criteria

System infrastructure audit complete and verified
Implementation Management Plan delivered and reviewed
Project Plan delivered
Stakeholder Presentation(s) conducted

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1.3 Assess & Define (Stage 2)

The primary objective of Assess & Define is to gather information about the current County business processes and translate the material into future business processes using Tyler Applications. Tyler uses a variety of methods for obtaining the information, all requiring County collaboration. The County shall provide complete and accurate information to Tyler staff for analysis and understanding of current workflows and business processes.

1.3.1 Fundamentals Review

Fundamentals Review provides Functional Leads and Power Users an overall understanding of software capabilities prior to beginning current and future state analysis. The primary goal is to provide a basic understanding of system functionality, which provides a foundation for upcoming conversations regarding future state processing.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 2	Fundamentals Review																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Schedule fundamentals review & provide fundamentals materials & prerequisites, if applicable	A	R	I									C	I		I			I		
Complete fundamentals materials review and prerequisites		I										A	R		I				C	
Ensure all scheduled attendees are present			I	I							A	R	C		I					
Facilitate fundamentals review			A	R								I	I		I					

1.3.2 Current/Future State Analysis

The County and Tyler will evaluate current state processes, options within the new software, pros and cons of each option based on current or desired state, and make decisions about future state configuration and processing as available within the new software.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 2	Current/Future State Analysis																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Conduct Current & Future State analysis		A	R									I	C	I	C					
Provide pros and cons of Tyler software options		A	R									I	C	I	C					
Make Future State Decisions according to due date in the Project Plan		I	I							C	A	R	I	C	I					
Record Future State decisions (Build Blueprint)		A	R									I	C	I	C					

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1.3.3 Data Conversion Planning & Mapping

This entails the activities performed in preparation to convert data from the County's Legacy System Applications to the Tyler system. Tyler staff and the County work together to complete Data Mapping for each piece of data (as outlined in the Agreement) from the Legacy System to a location in the Tyler system.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 2	Data Conversion Planning & Mapping																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Review contracted data conversion(s) elements		A	R	I						C	C			C				C		
Map data from Legacy System to Tyler system		A	R	C						I			C	C				C		
Pull conversion data extract		I		C	C							A	C	C				R		
Run balancing reports and screen captures for data pulled and provide to Tyler		I		I								A	C	R				I		
Review and approve initial data extract	A	I	C	R								I						I		
Correct issues with data extract, if needed		I		C	C							A	C	C				R		

Standard 3rd Party Data Exchange Planning

An Integration is a real-time or automated exchange of data between two systems. Standard Data Exchange tools are available to fulfill Integrations with external systems by allowing clients to get data in and out of the Tyler system. Data exchange tools can take the form of Imports and Exports, and Application Programming Interfaces (APIs). APIs may require additional licensing and may have some restrictions on use. Please refer to your licensing agreement for further information.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 2	Standard 3rd Party Data Exchange Planning																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Review Standard or contracted Data Exchanges		A	R									C	I		I			C		
Define or confirm needed Data Exchanges			I	C								A	C		C			R		

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1.3.4 Modification Analysis & Specification

Tyler staff conducts additional analysis and develops specifications known as Business Requirements Documents (BRDs) based on information discovered during this Stage. The County reviews the Business Requirements Documents (BRDs) and confirms they meet the County's needs prior to acceptance. Out of Scope items or changes to Business Requirements Documents (BRDs) after acceptance of this Phase may require a Change Request.

Tyler's intention is to minimize Modifications by using Standard functionality within the Application, which may require a County business process change. It is the responsibility of the County to detail all of their needs during the Assess & Define Stage. Tyler will write up Business Requirements Documents (BRDs) (for County approval) for contracted program Modifications. Upon approval, Tyler will make the agreed upon modifications to the respective program(s). Once the Modifications have been delivered, the County will test and approve those changes during the Build & Validate Stage.

For the purposes of this Project and SOW there is (1) Custom Data Exchange and (0) Modifications included within Scope. It is the County's intention to use Standard functionality within the Application. Should there be a need for any Modifications, the County understands Change Requests will be required and the Change Control process followed.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 2	Modification Analysis & Specification																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Analyze contracted modified program requirements		A	R				C					I	C	I	C			C		
Develop Business Requirements Documents (BRDs)		A	R				C					I	I		I			I		
Review Business Requirements Documents (BRDs); provide changes to Tyler, if applicable		I	C				C					A	R	I	C			C		
Sign-off on Business Requirements Documents (BRDs) to authorize work		I	I				I			A	R	C	I	I				C		

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1.3.5 Forms and Reports Planning

The County and Tyler Project Managers review needed Forms and Reports. **For the purposes of this Project and SOW there is (1) Report included within Scope.**

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 2	Forms & Reports Planning																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Review required Forms and Reports output		A	R									I	C		C			I		
Review all Forms and Reports		A	R									I	C		C		I			
Identify additional Forms and Reports needs		I	C		C							A	R		C			I		
Add applicable tasks to Project Plan supporting Forms and Reports activities	A	R	I		C							C	I		I			I		

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1.3.6 System Deployment

The Tyler technical services team Installs Tyler Applications on the server and ensures the platform operates as expected.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 2	System Deployment																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Install contracted software on server		A						R				I						C		
Ensure platform operates as expected		A						R				I						C		

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1.3.7 Control Point 2: Assess & Define Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below. Advancement to the Build & Validate Stage is dependent upon Tyler's receipt of the Stage Acceptance.

Assess & Define Stage Deliverables

Completed analysis

- Objective: Gather and document information related to County business processes for current/future state analysis as it relates to Tyler approach/solution
- Scope: Provide Build Blueprint based on current/future state analysis
- Acceptance criteria: County acceptance of Build Blueprint based on capturing decisions to satisfy County business needs/requirements through configuration and setups to be achieved through Tyler solution

Data conversion summary and specification documents

- Objective: Define data conversion approach and strategy
- Scope: Data conversion approach defined, data extract strategy, conversion and reconciliation strategy
- Acceptance criteria: Data conversion document(s) delivered to the County, reflecting complete and accurate conversion decisions

Modification specification documents

- Objective: Provide comprehensive outline of identified gaps, and County requirements to be met by the modified program
- Scope: Provide details to design solution(s) for Modification(s)
- Acceptance criteria: County accepts Business Requirements Document(s) and agrees that the content meets their business needs

Completed Identification of Forms and Reports

- Objective: Provide crosswalk of current solution Forms and Reports to Tyler available Forms and Reports
- Scope: Review County required Forms and Reports to determine if Tyler software has solutions or Modifications will be necessary
- Acceptance criteria: Forms and Reports crosswalk has been created and custom Forms and Reports have been identified

Installation checklist

- Objective: Installation of purchased Tyler software
- Scope: Tyler will conduct an initial coordination call, perform an Installation of the software included in the Agreement, conduct follow up to ensure all tasks are complete, and complete server system administration training

Assess & Define Stage Control Point Acceptance Criteria

Fundamentals review is complete

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- Current/Future state analysis completed; Build Blueprint delivered, reviewed and verified
- Data conversion mapping and extractions completed and provided to Tyler, data conversion documents delivered to the County reflecting complete and accurate conversion decisions
- Data Exchange planning completed
- Business Requirement Documents (BRDs) for system Modifications are delivered to and accepted by the County
- Forms and Reports crosswalk provided to the County
- Tyler software is successfully Installed and available to authorized users. County team members are trained on applicable system administration tasks

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1.4 Build & Validate (Stage 3)

The objective of the Build & Validate Stage is to prepare the software for use in accordance with the County's needs identified during the Assess & Define Stage, preparing the County for Final Testing and Training.

1.4.1 Configuration

Tyler staff collaborates with the County to complete software configuration based on the outputs of the future state analysis performed during the Assess & Define Stage. The County collaborates with Tyler staff iteratively to Validate software configuration.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 3	Configuration & Power User Training																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Perform configuration		A	R									I	C		I					
Process and Validation training		A	R									I	C	I	C				I	
Validate configuration		I	C										A	C	R			C		

1.4.2 Data Conversion & Validation

Tyler completes an initial review of the converted data for discrepancies. With assistance from the County, the Tyler data conversion team addresses items within the conversion program to provide the most efficient data conversion possible. With guidance from Tyler, the County reviews specific data elements within the system and identifies and reports discrepancies in writing. Iteratively and with the assistance of the County, Tyler will address conversion data discrepancies prior to Acceptance.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 3	Data Conversion & Validation																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Write and run data conversion program against Client data		A	I	C	R							I						C		
Complete initial review of data discrepancies		A	I	C	R							I	I					C		
Review data conversion and submit needed corrections			I	C	I							A	C		R			C		
Revise conversion program(s) to address discrepancies		A	I	C	R							I	I		C			C		

1.4.3 Standard 3rd Party Data Exchange Validation

Tyler provides training on Data Exchange(s) and the County tests each Data Exchange.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 3	Standard 3rd Party Data Exchange Validation																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Train Data Exchange(s) processing in Tyler software		A	R									I	I	I				C	I	
Coordinate 3rd party Data Exchange activities		I	I									A	C		C			R		
Test all Standard 3rd party Data Exchange(s)			I	C								A	C	I	R			C		

1.4.4 Modification Delivery & Validation

Tyler delivers in Scope Modification(s) to the County for preliminary testing. The County and Tyler in an iterative process will work to ensure Modifications function per the signed Business Requirements Documents (BRDs).

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 3	Modification Delivery & Validation																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Develop and deliver contracted modified program(s)	A	I	C	I			R					I	C	I	C			I		C
Test contracted modified program(s) in isolated database		I	C				C					A	C		R			C		
Report discrepancies between Business Requirements Documents (BRDs) and delivered contracted modified program(s)			I	I				I				A	R		C			C		
Make corrections to contracted modified program(s) as required	A	I	C	I			R					I	C		C			I		

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1.4.5 Forms and Reports Validation

Tyler provides training on Standard Forms and Reports and the County tests each Standard Forms and Reports.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 3 / TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
											TYLER / CLIENT									
Standard Forms and Reports Training		A	R									I	C		C			I		
Test Standard Forms and Reports			I	C		C						A	C		R			C		

1.4.6 Power User Training

Power Users attend training sessions to learn how to utilize Tyler software. Training focuses primarily on day-to-day County processes that will be delivered via group training, webinar, eLearning and/or live training sessions.

The number of occurrences for each scheduled training or implementation topic and the maximum number of Power Users to attend are defined in section 3.6 of this SOW; the parameter can be modified with mutual agreement by both the County and Tyler. County Power Users who attend the Tyler sessions will provide training to all other County users.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 3	Power User Training																		
	TYLER									CLIENT									
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Conduct Power User training sessions		A	R									C	I		C			I	I	

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1.4.7 Control Point 3: Build & Validate Stage Acceptance

Acceptance criteria for this Stage includes all criteria listed below. Advancement to the Final Testing & Training Stage is dependent upon Tyler's receipt of the Stage Acceptance.

Build & Validate Stage Deliverables

Initial data conversion
> Objective: Convert Legacy System data into Tyler system
> Scope: Data conversion program complete; deliver converted data for review
> Acceptance criteria: Initial error log available to County for review

Data conversion verification document
> Objective: Provide instructions to the County to verify converted data for accuracy
> Scope: Provide self-guided instructions to verify specific data components in Tyler system
> Acceptance criteria: The County acknowledges data conversion delivery; the County
> completes data issues log review and provides Tyler with discrepancies

Installation of Modifications to the test environment on the County's server(s)
> Objective: Deliver Modification(s) in Tyler software
> Scope: Program for Modification is complete and available in Tyler software, Modification
> testing
> Acceptance criteria: The County acknowledges delivery of Modification(s), and the
> Modification(s) meet objectives described in the County-signed Business
> Requirements Document(s) (BRDs)

Standard Forms & Reports Available
> Objective: Execute processes and generate Standard Forms and Reports for client review
> Scope: Present all Standard Forms and Reports included in the Agreement
> Acceptance criteria: County acknowledges that Standard Forms and Reports are available in
> Tyler software for testing during the Final Testing & Training Stage

Build & Validate Stage Control Point Acceptance Criteria

The County and Tyler have done a review of primary configuration
Data conversions (except final pass) delivered; minor discrepancies remain
Standard 3rd party Data Exchange training provided
Modifications completed and available for testing during the Final Testing & Training Stage
Standard Forms and Reports available for testing during the Final Testing & Training Stage
Configuration completed for testing and Acceptance during the Final Testing & Training Stage
Power User Training completed

1.5 Final Testing & Training (Stage 4)

During Final Testing & Training, Tyler and the County review the final cutover plan. A critical project success factor is the County understanding the importance of Final Testing & Training and dedicating the resources required for testing and training efforts in order to ensure a successful Production Cutover.

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1.5.1 Cutover Planning

The County and Tyler Project Manager(s) discuss final preparations and critical dates for Production Cutover. Tyler delivers a Production Cutover checklist to outline cutover tasks to help prepare the County for success.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 4	Cutover Planning																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Cutover Planning Session		A	R	C						I		C	C	C	C			C	C	
Develop Production Cutover checklist		A	R	C						I	I	C	C	I	I			C		

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1.5.2 User Acceptance Testing (UAT)

The County performs User Acceptance Testing to verify software readiness for day-to-day business processing.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 4	User Acceptance Testing (UAT)																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Develop test scripts		I		C			C					A	C					R		
Perform User Acceptance Testing		I		C								A	C	C	R	I	C	C	I	
Accept modified program(s), if applicable			I	I		I					A	R	C		I	C		C		
Validate Reports performance			I	C		C						A	C		R			C		
Perform stress testing			I	I								A	I		C	I		C	R	

1.5.3 End User Training

End Users attend training sessions to learn how to utilize Tyler software. Training focuses primarily on day-to-day County processes that will be delivered by County Power Users via group live training sessions. Tyler will assist the Power Users in educating the End Users by providing input on agendas, training materials and providing clarification on the software to the Power Users. Tyler may be contracted to conduct End User formal training sessions at the then current time and materials rate.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 4	End User Training																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Conduct End User training sessions			I	C						I		A	C	I	R	I	I	I	I	

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1.5.4 Control Point 4: Final Testing & Training Stage Acceptance

Acceptance criteria for this Stage includes all criteria listed below. Advancement to the Production Cutover Stage is dependent upon Tyler's receipt of the Stage Acceptance.

Final Testing & Training Stage Deliverables

Production Cutover checklist
>
> Objective: Provide a detailed checklist outlining tasks necessary for Production Cutover
>
> Scope: Dates for final conversion, date(s) to cease system processing in Legacy System, date(s) for initial use and processing in Tyler systems for each Application, contingency plan
>
> Acceptance criteria: County acknowledges the checklist delivery including definition of all pre-production tasks, assignment of owners and establishment of due dates

Final Testing & Training Stage Acceptance Criteria

Production Cutover Checklist delivered and reviewed
Modification(s) tested and accepted
Standard 3rd party Data Exchange programs tested and accepted
Standard Forms and Reports tested and accepted
User Acceptance Testing completed
End User training completed

1.6 Production Cutover (Stage 5)

The County and Tyler resources complete tasks as outlined in the Production Cutover Plan and the County begins processing day-to-day business transactions in the Tyler software. Following Production Cutover, the County transitions to the Tyler support team for ongoing support of the Application.

1.6.1 Final Data Conversion

The County provides final data extract, reports and detailed screen captures from the Legacy System for data conversion and Tyler executes final data conversion. The County may need to manually enter into the Tyler system any data added to the Legacy System after final data extract.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 5	Final Data Conversion																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Provide final data extract		I		I						I		A	C	I	I	I	I	R		
Provide final extract balancing reports and detailed screen captures		I		I								A	C		R			I		
Convert and deliver final pass of data	A	I	I	R								I	I			I		C		
Load final pass of data to test database		A	I	R								I	I			I		C		
Validate final pass of data		I	C	C						I		A	C		R			C		
Load final conversion pass to production database		A	I	R						I		I	I	I	I	I		C		

1.6.2 Production Processing & Assistance

Tyler staff collaborates with the County during Production Cutover (go-live) activities. The County transitions to Tyler software for day-to-day business processing.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 5	Production Processing & Assistance																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Production processing		C	C							I	I	A	R	C	C	C	C	C	I	I
Provide production assistance		A	R					C		I		C	C	C	C	C	C	C		

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1.6.3 Transition to Tyler Support

Tyler Project Manager(s) introduce the County to the Tyler Support team, who provides the County with day-to-day assistance following Production Cutover. The County Project Manager(s), Support and Tyler Project Manager(s) review the list of outstanding issues and develop an action plan to address them. Ownership and priority for each issue is defined to ensure accountability and timeliness for resolution of the issue.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 5	Transition to Tyler Support																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Develop internal support plan		I								A	R	C	C	C	C			C	C	C
Conduct transition to Support meeting	I	A	R					C		I	C	C	C	C	I	I		C	I	I
Review outstanding project activities and develop action plan		A	R	C								C	C	I	C	I		C		
Complete activities assigned to County within the action plan			I	C								A	R		C			C		
Complete activities assigned to Tyler within the action plan			A	R						I	C				C			C		

1.6.4 Post-Production Services

Tyler Implementation provides post-production services and support for (90) days before Tyler Implementation closes the Project given the system meets the defined Acceptance criteria in the Agreement. Prior to scheduling services, the Tyler Project Manager(s) will collaborate with the County Project Manager(s) to identify periodic processes that Implementation will support during their initial occurrence. Tyler will then schedule and provide support for these events at the pre-determined timeframes.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 5	Schedule Post-Production Services																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Identify periodic processes for post-production support		C	C									A	R	I	C				I	
Schedule support for post-production periodic process	A	R	I									C	C	I	C		I		I	
Provide support for post-production periodic processes			A	R								I	C		C		C		I	

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1.6.5 Control Point 5: Production Cutover Stage Acceptance

Acceptance criteria for this Stage includes all criteria listed below. Advancement to the Phase/Project Closure Stage is dependent upon Tyler's receipt of this Stage Acceptance.

Production Cutover Stage Deliverables

Final data conversion

- Objective: Ensure (in Scope) Legacy System data is available in Tyler software in preparation for production processing
- Scope: Final passes of all conversions completed in this Phase
- Acceptance criteria: County acknowledges that data is available in production environment

Support transition documents

- Objective: Define strategy for on-going Tyler support
- Scope: Define support strategy for day-to-day processing, conference call with the County Project Manager(s) and Tyler Support team, define roles and responsibilities, define methods for contacting Support
- Acceptance criteria: The County acknowledges receipt of tools to contact Support and understands proper support procedures

Production Cutover Stage Control Point Acceptance Criteria

Final data conversion(s) delivered and loaded into Tyler production database
Processing is being done in Tyler production
Transition to Tyler Support is completed
Post-live services have been scheduled, if applicable

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1.7 Phase/Project Closure (Stage 6)

Project or Phase closure signifies full implementation of all products purchased and encompassed in the Phase or Project. The County moves into the next cycle of their relationship with Tyler (next Phase of implementation or long-term relationship with Tyler Support).

1.7.1 Close Phase/Project

The Tyler Project Manager(s) review the project budget and status of each contract Deliverable with the County Project Manager(s) prior to closing the Phase or Project.

RACI MATRIX KEY: **R** = Responsible **A** = Accountable **C** = Consulted **I** = Informed

STAGE 6	Close Phase/Project																			
	TYLER									CLIENT										
TASKS	Tyler Executive Manager	Tyler Implementation Manager	Tyler Project Manager	Tyler Implementation Consultant	Tyler Data Conversion Experts	Tyler Forms & Reports Experts	Tyler Modification Programmers	Tyler Technical Support	Tyler Sales	Client Executive Sponsor	Client Steering Committee	Client Project Manager	Client Functional Leads	Client Change Management Leads	Client Power Users	Client Department Heads	Client End Users	Client Technical Leads	Client Project Toolset Coordinator	Client Upgrade Coordinator
Review project budget and status of contract Deliverables		A	R							I	I	C								

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1.7.2 Control Point 6: Phase/Project Closure Stage Acceptance

Acceptance criteria for this Stage includes all criteria listed below. This is the final acceptance for the Phase/Project.

Phase/Project Closure Stage Deliverables

Phase/Project reconciliation report
- o Objective: Provide comparison of invoices against satisfied receivables and share contents of final invoice to be submitted to the County
- o Scope: To ensure all previous invoices have been satisfied and get agreement from the County on approval for final invoice
- o Acceptance criteria: Acceptance of services and budget analysis

Phase/Project Closure Stage Control Point Acceptance Criteria

Outstanding Phase or project activities assigned to Tyler Implementation have been completed
Phase/final project invoicing has been reconciled
Software functioning to achieve business requirements

Roles and Responsibilities

Tyler Roles and Responsibilities

Tyler assigns project manager(s) prior to the start of each Phase of the Project. The project manager(s) assign additional Tyler resources as the schedule develops and as needs arise. One person may fill multiple project roles.

Tyler Executive Management

Provides clear direction for Tyler staff on executing on the Project Deliverables to align with satisfying the County's overall organizational strategy.

Authorizes required project resources.

Resolves all decisions and/or issues not resolved at the implementation management level as part of the escalation process.

Offers additional support to the project team and is able to work with other Tyler department managers in order to escalate and facilitate implementation project tasks and decisions.

Acts as the counterpart to the County's executive sponsor.

Tyler Implementation Management

Acts as the counterpart to the County steering committee.

Assigns initial Tyler project personnel.

Works to resolve all decisions and/or issues not resolved at the Project Management level as part of the escalation process.

Attends County steering committee meetings as necessary.

Provides support for the project team.

Provides management support for the Project to ensure it is staffed appropriately and staff have necessary resources.

Monitors project progress including progress towards agreed upon goals and objectives.

Tyler Project Manager

The Tyler project manager(s) provides oversight of the Project, coordination of resources between departments, management of the project budget and schedule, effective risk and issue management, and is the primary point of contact for all Project related items.

Contract Management
  Validates contract compliance throughout the Project.
  Ensures Deliverables meet contract requirements.
  Acts as primary point of contact for all contract and invoicing questions.
  Prepares and presents contract milestone sign-offs for acceptance by County project manager(s).
  Coordinates Change Requests, if needed, to ensure proper Scope and budgetary compliance.
Planning
  Update and deliver Implementation Management Plan.
  Defines project tasks and resource requirements.
  Develops initial project schedule and full scale Project Plan.
  Collaborates with County project manager(s) to plan and schedule project timelines to achieve on-time implementation.

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Implementation Management

Tightly manages Scope and budget of Project; establishes process and approval matrix with the County to ensure Scope changes and budget planned versus actual are transparent and handled effectively and efficiently.

Establishes and manages a schedule and resource plan that properly supports the Project Plan that is also in balance with Scope/budget.

Establishes risk/issue tracking/reporting process between the County and Tyler and takes all necessary steps to proactively mitigate these items or communicates with transparency to the County any items that may impact the outcomes of the Project.

Collaborates with the County's project manager(s) to establish key business drivers and success indicators that will help to govern project activities and key decisions to ensure a quality outcome of the project.

Sets a routine communication plan that will aide all project team members, of both the County and Tyler, in understanding the goals, objectives, current status and health of the project.

Team Management

Acts as liaison between project team and Tyler manager(s).

Identifies and coordinates all Tyler resources across all applications, Phases, and activities including development, forms, installation, reports, implementation, and billing.

Provides direction and support to project team.

Builds partnerships among the various stakeholders, negotiating authority to move the Project forward.

Manages the appropriate assignment and timely completion of tasks as defined in the Project Plan, task list, and Production Cutover Checklist.

Assesses team performance and adjusts as necessary.

Interfaces closely with Tyler developers to coordinate program Modification activities.

Coordinates with in Scope 3rd party providers to align activities with ongoing project tasks.

Tyler Implementation Consultant

Completes tasks as assigned by the Tyler project manager(s).

Performs problem solving and troubleshooting.

Follows up on issues identified during sessions.

Documents activities for on site services performed by Tyler.

Provides conversion Validation and error resolution assistance.

Recommends guidance for testing Forms and Reports.

Tests software functionality with the County following configuration.

Assists during Production Cutover process and provides production support until the County transitions to Tyler Support.

Provides product related education.

Effectively facilitates training sessions and discussions with County and Tyler staff to ensure adequate discussion of the appropriate agenda topics during the allotted time.

Conducts training (configuration, process, conversion Validation) for Power Users and the County's designated trainers for End Users.

Clearly documents homework tasks with specific due dates and owners, supporting and reconciling with the final Project Plan.

Keeps Tyler project manager(s) proactively apprised of any and all issues which may result in the need for additional training, change in schedule, change in process decisions, or which have the potential to adversely impact the success of the Project prior to taking action.

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Tyler Sales

Provide sales background information to Implementation during Project initiation.
Support Sales transition to Implementation.
Provide historical information, as needed, throughout implementation.

Tyler Software Support

Manages incoming client issues via phone, email, and online customer incident portal.
Documents and prioritizes issues in Tyler's Customer Relationship Management (CRM) system.
Provides issue analysis and general product guidance.
Tracks issues and tickets to timely and effective resolution.
Identifies options for resolving reported issues.
Reports and escalates defects to Tyler Development.
Communicates with the County on the status and resolution of reported issues.

Tyler SaaS Technicians

Provides maintenance of hosted server hardware, operating system, and Software Upgrades.
Provides IT-related services for server environment.
Provides remote technical assistance and tracks issues.
Provides systems management and disaster recovery services within hosting services.
Adds new County users; SaaS determines user names incorporating a unique client identifier and user initials.
Performs Tyler Software Upgrades through coordination with the County.

County Roles and Responsibilities

County resources will be assigned prior to the start of each Phase of the project. One person may be assigned to multiple project roles.

County Executive Sponsor

Provides clear direction for the Project and how the Project applies to the organization's overall strategy.
Champions the Project at the executive level to secure buy-in.
Authorizes required Project resources.
Resolves all decisions and/or issues not resolved at the County steering committee level as part of the escalation process.
Actively participates in organizational change communications.

County Steering Committee

Works to resolve all decisions and/or issues not resolved at the project manager level as part of the escalation process.
Attends all scheduled steering committee meetings.
Provides support for the project team.
Assists with communicating key project messages throughout the organization.
Prioritizes the project within the organization.
Provides management support for the project to ensure it is staffed appropriately and staff have necessary resources.
Monitors project progress including progress towards agreed upon goals and objectives.

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Has the authority to approve or deny changes impacting the following areas:
Cost
Scope
Schedule
Project Goals
County Policies

County Project Manager

The County shall assign project manager(s) prior to the start of this Project with overall responsibility and authority to make decisions related to project Scope, scheduling, and task assignment, and communicates decisions and commitments to the Tyler project manager(s) in a timely and efficient manner. When the County project manager(s) do not have the knowledge or authority to make decisions, he or she engages the correct resources from County to participate in discussions and make decisions in a timely fashion to avoid Project delays.

Contract Management
Validates contract compliance throughout the Project.
Ensures invoicing and Deliverables meet contract requirements.
Acts as primary point of contact for all contract and invoicing questions.
Signs off on contract milestone acknowledgment documents.
Collaborates on and approves Change Requests, if needed, to ensure proper Scope and budgetary compliance.
Planning
Review and acknowledge Implementation Management Plan.
Defines project tasks and resource requirements for County project team.
Collaborates in the development and approval of the initial Project Plan and Project Plan.
Collaborates with Tyler project manager(s) to plan and schedule Project timelines to achieve on-time implementation.
Implementation Management
Tightly manages Project budget and Scope and collaborates with Tyler project manager(s) to establish a process and approval matrix to ensure Scope changes and budget planned versus actual are transparent and handled effectively and efficiently.
Collaborates with Tyler project manager to establish and manage a schedule and resource plan that properly supports the Project Plan, as a whole, that is also in balance with Scope/budget.
Collaborates with Tyler Project manager(s) to establishes risk/issue tracking/reporting process between the County and Tyler and takes all necessary steps to proactively mitigate these items or communicates with transparency to Tyler any items that may impact the outcomes of the Project.
Collaborates with Tyler Project manager(s) to establish key business drivers and success indicators that will help to govern Project activities and key decisions to ensure a quality outcome of the Project.
Routinely communicates with both County staff and Tyler, aiding in the understanding of goals, objectives, current status, and health of the Project by all team members.
Team Management
Acts as liaison between project team and stakeholders.
Identifies and coordinates all County resources across all modules, Phases, and activities including data conversions, forms design, hardware and software installation, reports building, and satisfying invoices.

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Provides direction and support to project team.

Builds partnerships among the various stakeholders, negotiating authority to move the Project forward.

Manages the appropriate assignment and timely completion of tasks as defined in the Project Plan, task list, and Production Cutover Checklist.

Assesses team performance and takes corrective action, if needed.

Provides guidance to County technical teams to ensure appropriate response and collaboration with Tyler Technical Support Teams to ensure timely response and appropriate resolution.

Coordinates in Scope 3rd party providers to align activities with ongoing Project tasks.

County Functional Leads

Makes business process change decisions under time sensitive conditions.

Communicates existing business processes and procedures to Tyler consultants.

Assists in identifying business process changes that may require escalation.

Attends and contributes business process expertise for current/future state analysis sessions.

Identifies and includes additional subject matter experts to participate in Current/Future State Analysis sessions.

Provides business process change support during Power User and End User training.

Completes performance tracking review with client project team on End User competency on trained topics.

Provides Power and End Users with dedicated time to complete required homework tasks.

Act as an ambassador/champion of change for the new process.

Identifies and communicates any additional training needs or scheduling conflicts to County project manager.

Prepares and Validates Forms.

Actively participates in all aspects of the implementation, including, but not limited to, the following key activities:

Task completion

Stakeholder Presentation

Implementation Management Plan development

Schedule development

Maintenance and monitoring of risk register

Escalation of issues

Communication with Tyler project team

Coordination of County resources

Attendance at scheduled sessions

Change Management activities

Modification specification, demonstrations, testing and approval assistance

Conversion Analysis and Verification Assistance

Decentralized End User Training

Process Testing

User Acceptance Testing

County Power Users

Participate in Project activities as required by the project team and project manager(s).

Provide subject matter expertise on County business processes and requirements.

Act as subject matter experts and attend current/future state and validation sessions as needed.

Attend all scheduled training sessions.

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Participate in all required post-training processes as needed throughout Project.

Participate in Conversion Validation.

Test all Application configuration to ensure it satisfies business process requirements.

Become Application experts.

Participate in User Acceptance Testing.

Adopt and support changed procedures.

Complete all Deliverables by the due dates defined in the Project Plan.

Demonstrate competency with Tyler products processing prior to Production Cutover.

Provide knowledge transfer to County staff during and after implementation.

County End Users

Attend all scheduled training sessions.

Become proficient in Application functions related to job duties.

Adopt and utilize changed procedures.

Complete all Deliverables by the due dates defined in the Project Plan.

Utilize software to perform job functions at and beyond Production Cutover.

County Technical Support

Coordinates updates and releases with Tyler as needed.

Coordinates the copying of source databases to training/testing databases as needed for training days.

Extracts and transmits conversion data and control reports from County's Legacy System per the conversion schedule set forth in the Project Plan.

Coordinates and adds new users and printers and other Peripherals as needed.

Validates all users understand log-on process and have necessary permission for all training sessions.

Coordinates Interface development for County third party Data Exchanges.

Develops or assists in creating Reports as needed.

Ensures onsite system hardware meets specifications provided by Tyler.

Assists with software Installation as needed.

County Upgrade Coordinator

Becomes familiar with the Software Upgrade process and required steps.

Becomes familiar with Tyler's releases and updates.

Utilizes Tyler Community to stay abreast of the latest Tyler releases and updates, as well as the latest helpful tools to manage the County's Software Upgrade process.

Assists with the Software Upgrade process during implementation.

Manages Software Upgrade activities post-implementation.

Manages Software Upgrade plan activities.

Coordinates Software Upgrade plan activities with County and Tyler resources.

Communicates changes affecting users and department stakeholders.

Obtains department stakeholder sign-offs to upgrade production environment.

County Project Toolset Coordinator

Ensures users have appropriate access to Tyler project toolsets such as Tyler University, Tyler Community, Tyler Product Knowledgebase, SharePoint, etc.

Conducts training on proper use of toolsets.

Validates completion of required assignments using toolsets.

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County Change Management Lead

Validates users receive timely and thorough communication regarding process changes.

Provides coaching to supervisors to prepare them to support users through the project changes.

Identifies the impact areas resulting from project activities and develops a plan to address them proactively.

Identifies areas of resistance and develops a plan to reinforce the change.

Monitors post-production performance and new process adherence.

Glossary

Word or Term	Definition
Application	A computer program designed to perform a group of coordinated functions, tasks or activities for the benefit of the user.
Change Control	A systematic approach for managing change governing how Change Requests will be received, assessed and acted on.
Change Management	An approach for ensuring that changes are thoroughly and smoothly implemented and that the lasting benefits of change are achieved. The focus is on the global impact of change with an intense focus on people and how individuals and teams move from the current situation to the new one.
Change Request	A form used as part of the Change Control process whereby changes in the Scope of work, timeline, resources, and/or budget are revised and agreed upon by participating parties.
Consumables	Items that are used on a recurring basis, usually by Peripherals. Examples: paper stock or scanner cleaning kits.
Control Point	Occurring at the end of each Stage, the Control Point serves as a formal client review point. Project progress cannot continue until the client acknowledges the agreed upon Deliverables of the Stage have been met or agree on an action plan to make the Deliverable acceptable and move to next Stage while executing final steps of current Stage.
Cutover	The point when a client begins using Tyler software in production.
Data Exchange	A term used to reference Imports and Exports, and Interfaces which allow data to be exchanged between an external system and Tyler software.
Data Mapping	The process of mapping fields from the Legacy System to the appropriate location in the new system from one or more sources.
Deliverable	A tangible or intangible object/document produced as a result of the Project that is intended to be delivered to a client (either internal or external) or vendor at a specific time.
End User	The person for whom the software is designed to use on a day-to-day basis.
Forms	A document which is typically printed on a template background and only captures data for one record per page. Forms are provided to entity customers whether internal (employees) or external (citizens).
Imports and Exports	A process within the system that a user is expected to run to consume (Import) or produce (Export) a specifically defined file format/layout.
Interface	A real-time or automated exchange of data between two systems.

Install	References the initial installation of software files on client services and preparing the software for use during configuration. The version currently available for general release will always be used during the initial install.
Legacy System	The system from which a client is converting.
Modification	Modification of software program package to provide individual client requirements documented within the Scope of the Agreement.
Peripherals	An auxiliary device that connects to and works with the computer in some way. Examples: mouse, keyboard, scanner, external drive, microphone, speaker, webcam, and digital camera.
Phase	A portion of the Project in which specific set of related products are typically implemented. Phases each have an independent start, Production Cutover and closure dates but use the same Implementation Plans as other Phases within the Project. Phases may overlap or be sequential and may have the same Tyler project manager and Tyler project team or different individuals assigned.
Power User	An experienced client person or group who is (are) an expert(s) in the client business processes, as well as knowledgeable in the requirements and acceptance criteria.
Project	The Project includes all implementation activity from Plan & Initiate to Closure for all products, Applications and functionality included in a single Agreement. The Project may be broken down into multiple Phases.
Project Plan	The Project Plan serves as the master blueprint for the Project. As developed, the Project schedule will become a part of the Project Plan and outline specific details regarding tasks included in the Project Plan.
Project Planning Meeting	Occurs during the Plan & Initiate Stage to coordinate with the Client project manager to discuss Scope, information needed for project scheduling and resources.
Questionnaire	A document containing a list of questions to be answered by the client for the purpose of gathering information needed by Tyler to complete the implementation.
RACI	A chart describing level of participation by various roles in completing tasks or Deliverables for a Project or process. Also known as a responsibility assignment matrix (RAM) or linear responsibility chart (LRC).
Reports	Formatted to return information related to multiple records in a structured format. Information is typically presented in both detail and summary form for a user to consume.

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Scope	Products and services that are included in the Agreement.
Software Upgrade	References the act of updating software files to a newer software release.
Stage	The top-level components of the WBS. Each Stage is repeated for individual Phases of the Project and requires acknowledgement before continuing to the next Stage. Some tasks in the next Stage may begin before the prior Stage is complete.
Stakeholder Presentation	Representatives of the Tyler implementation team will meet with key client representatives to present high level Project expectations and outline how Tyler and the Client can successfully partner to create an environment for a successful implementation.
Standard	Included in the base software (out of the box) package.
Statement of Work (SOW)	Document which will provide supporting detail to the Agreement defining Project -specific activities and Deliverables Tyler will provide to the client.
Test Plan	Describes the testing process. Includes "Test Cases" to guide the users through the testing process. Test cases are meant to be a baseline for core processes; the client is expected to supplement with client specific scenarios and processes.
Validation (or to validate)	The process of testing and approving that a specific Deliverable, process, program or product is working as expected.
Work Breakdown Structure (WBS)	A hierarchical representation of a Project or Phase broken down into smaller, more manageable components.

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Addendum - iasWorld SmartFile Implementation

Tyler and client to work in a collaborative effort to identify **3** e-filings to be implemented within the SmartFile online filing solution. For each identified filing, the following activities will be performed:

- Tyler to demonstrate existing e-filings that are similar to client identified e-filing needs. Client subject matter experts (SMEs) to share additional requirements not accounted for in existing template. Tyler will tailor the existing e-filings to fulfill client's needs.
  - The objective is to identify an existing SmartFile template to be used as a base for deploying the e-filing. In the absence of a suitable base template, a change order for additional scope may be required.
- Create a SmartFile Requirements document describing the additional client requirements for changes to be applied to existing e-filing including transform definition for posting data to iasWorld transactions.
- Installation of the SmartFile application.
- Configure the SmartFile application to meet approved requirements defined in the SmartFile Requirement document.
- Conduct walk through sessions of the SmartFile configuration.
- Client to create a User Acceptance Testing (UAT) document to guide client testing.
  - Tyler to assist by answering specific questions and providing recommendations.
- Tyler to conduct train-the-trainer user training on the SmartFile reviewer (enterprise interface) to client SMEs.
- Tyler to conduct SmartFile administration training to client technical staff.

The following table quantifies the maximum elements to be included for each SmartFile filing.
   Note: Exceeding the maximums is supported in the SmartFile application; however, a change order may be required for additional implementation services.

SmartFile Item	Quantity	Comment
Max # of form data entry fields	50	
Max # of LOVs	10	LOV= List of values, aka Pick List
Max # of Custom view creation	1	iasWorld data used in filing may need to be combined, created, summarized etc. before used by SmartFile e.g. If the filing is based on records from multiple tables, custom views may be needed.

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Max # Transactions	1	By default, each filing that is published to iasWorld will be associated with a single transaction type
Max # of iasWorld base tables to be updated	5	
Max # of business rules	5	Business rules trigger behaviors within a filing e.g. mathematical calculations, auto population of fields, rules to check data for errors etc.
Max # Review Iterations	2	Client has two review sessions to identify errors and deficiencies relative to defined requirements.
Max # Training hours	4	

The following filing characteristics will also be accommodated if needed:

- Unique PIN assignment for accessing filing: A unique PIN is set up for each PARID that user must enter before filings
- Multiple Parcel based filings: Filings can be set up to file on multiple accounts (PARIDs) e.g. public user can search and select multiple records to file an appeal on
- Allowance for document attachments and conditional attachments
- Automatic filing delegation for enterprise reviewers: Filings are automatically assigned to different staff based on content

The following Items, which are supported in the SmartFile framework but not included in standard service delivery, are not in scope but can be implemented under change orders:

- Payment handling for filing fees and interfacing with payment processors is not included
- Record deactivations based on filing input: In some cases, records used in filing may need to be deactivated (CUR=D) based on user inputs
- Forms with 1 to Many relationships: Filings on a single PARID that have multiple associated records.
- Comparable Select and Comparable Grid tabs.

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iasWorld Public Access Implementation

Implementation Activities

Outlined below are the implementation activities to be performed by Tyler analysts to deploy the Public Access solution.

- Hold a project kick off meeting and regular project status meetings
- If the client is hosting Public Access, Tyler will supply server and database requirements for hosting the Public Access site (this is not required for Tyler hosted deployments).
- Install a Public Access records "base" site on servers within Tyler's SaaS hosting environment or within client's hosting environment. A "staging" (test) site and a production site will be installed.
- Review the base site with the client and determine site specific requirements to be applied to the configurable site features outlined in section 4. Requested configuration changes or additions that are not already present within the iasWorld PRM module are not in scope.
- Configure the Tyler "Public Access" site template for site specific requirements.
- Assist the client with site testing
- Deploy a data refresh script that copies a data subset from the iasWorld database to the Public Access database. Data refreshes can be scheduled daily, weekly or monthly.
- Deliver site administration training
- Assist with production site domain name and URL determination.

Client Responsibilities

Outlined below are the items and activities that the client is required to provision for a Tyler hosted Public Access implementation:

- For client hosted deployments the client is responsible for sourcing, acquiring and configuring web servers to host both a test and production Public Access site. Tyler will provide documentation to assist with the activity.
- The client is to supply any graphic files for site styling including banner graphics, page body graphics and home page textual content.
- General site testing and specific testing of data fields to ensure all property related data is displayed accurately.
- The client is responsible for providing GIS Map Services published in client hosted ArcGIS Server or ESRI hosted ArcGIS Online. These services must be accessible over the internet or be accessible from Tyler's hosting environment via an ASA appliance installed on the county network.
- Determination of public URL and domain name for live production site.

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- If migrating from a legacy public site to Tyler Public access, the client is responsible for determining the site URL transition strategy to direct traffic from the old site to the new site. As well the client is responsible for changing any hyperlinks on organization sites that are referencing the legacy site.

Configurable Site Features

Described below are the Public Access features that are typically set up and configured.

Search Methods

The table below summarizes the search methods that are available for configuration.

Type	Description
Address	Search current year records by Address
Parcel Number	Search current year records by Parcel Number
Owner	Search current year records by Owner name
Advanced	Search current year records using up to 15 configurable fields
Map Search	Map browsing and mapped parcel selection (in current year). Includes optional measurement and spatial buffer tool.
Neighborhood Sales Search	Quick link listing sales in subject parcels assessment neighborhood

Notes:
- *Mapping capabilities are subject to compatible map services provided by the client. Inline based map address and intersection searching may be included if appropriate "geocode" map service provided by the client.*
- *Any search types listed can be removed at discretion of client.*

Record Details

The table below outlines the standard record detail items to be presented and configured.

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Date Grouping	Contents
Profile	Parcel Details
	Ownership
	Legal Description
Values	Current Values
	Values History (year over year in grid)
Sales/Transfers	Sale Summary (in grid)
	Sale Details
Residential	Dwelling Information
	Addition Details
	Outbuildings (OBY)
Commercial	Building Information
Land	Land line summary (grid)
	Land line details
Permits	Permit Summary (grid)
	Permit Details

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Manufactured Home – MH_OH	
Manufactured Home – MH_EQ	
Current Taxes	Tax bill amounts Payments Taxes Due
Special Assessments	Special assessments
Photos	Show all photos or rank1 and/or specified category
Sketch	Sketch graphic and legend
Map	Subject parcel highlight, standard zoom controls, layer controls, select parcels, identify, measure, print

Notes:
- Data grouping and layout may vary from what is shown above.
- Inclusion of data items is subject to data availability within the iasWorld application.
- Any Items listed can be removed at discretion of client.

- *Mapping inclusion requires ArcGIS Server or ArcGIS Online map services provisioned by the client.*
- *Requested configuration changes or additions that are not already present within the iasWorld PRM module are <u>not</u> in scope.*

Reports

The following reports can optionally be configured:

- Mailing list and or Attribute export is included. This may be used in conjunction with spatial buffer tool.
- PRC report from iasWorld On Demand reports
- Tax bill Report from iasWorld On Demand reports

Style Elements

The client is responsible for supplying color specifications, header/banner graphics, splash or home page graphics and textual content. Tyler will apply these style elements to the Tyler Public Access template within a prescribed site navigation framework.

Other items

The following features may also be configured:

- Disclaimer acceptance message. This is a configurable disclaimer that can be turned on and must be accepted once per browser session by public users.
- Hidden accounts. Accounts that have been flagged in iasWorld to be hidden (OWNDAT.HIDENAME) can be configured to not be found or have names replaced with a suitable text message (e.g. "Owner Name withheld by request").
- Site footer messages.
- Contact Us page with up to 4 configurable send to email addresses associated to inquiry type.

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Statement of Work

Tyler Technologies

Jackson County, Missouri
Maintenance of Assessment Records and Data
And Reassessment Services

August 11, 2020

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Empowering people who serve the public®

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Table of Contents

Tyler's Appraisal Methodologies and Standards

Tyler has firsthand experience in the effort required to sustain such an engagement that will span years. We will work closely with the County, Legislators, and the Director of Assessment and her staff to update and establish an accurate residential, agricultural, exempt, commercial and industrial property database.

We propose to collect the data in a manner sufficient to not only meet the requirements of the County's address key information that is required in a modern CAMA solution, like as Tyler's iasWorld CAMA™ Administration and Tax solution, to derive accurate and defendable values. Tyler's proposed team offers unparalleled experience in mass appraisal services with expertise in areas such as analysis, modeling and property valuation.

The County can be assured that we will measure results against the International Association of Assessing Officers (IAAO) Mass Appraisal Standards and comply with the Uniform Standards of Professional Appraisal Practices (USPAP), Standard 6 requirements, and Missouri Assessors standards for the development and reporting of mass appraisals.

Tyler's appraisal methodology and standards are well defined within our company and our staff protocols and procedures. Unique to our methodology is our internal QA/QC process which serves as a quality control of every aspect of our effort and matches up well with the expectations laid out in the request for proposal.

Project Schedule

Tyler's team is providing a master statement of work for the County's RFP No. 69-19, Maintenance of Assessment Records, and the County's RFP No. 69-19. Physical property characteristics, and review of property sales are the building blocks and foundation of a strong assessment system. The collected data and research which will be performed as part of the services described will form the foundation for the reassessment services and opinions of value. Tyler understands the importance of the County's assessment roll and having accurate assessing records is the foundation of economic development efforts that will be necessary for the County's continued future economic vitality. Also, Tyler understands the accuracy of assessment information is of paramount importance to minimize valuation appeals and to ensure and restore citizen confidence in their government. Since the last appropriately staffed and funded reassessment was many years ago, a vast number of the property records may not have been kept up to date with the rapidly changing property market, as is evidenced with the 2019 Reassessment results.

To that end, we are providing reassessment services which will include data collection, analytical review of the data collected, ongoing sales and new construction service, final valuation, and support of values produced. The timeframe for completion is 2023 and is detailed in the Plan Approach and Timeline section of this statement of work.

It is understood that the Director of Assessment is to serve and act as Appraiser-in-Chief and that all decisions as to final assessed valuations and procedures followed will be approved by the Director of Assessment.

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We want to thank Jackson County and all those involved in the Request for Proposal process. We appreciate the opportunity extended to us.

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Statement of Work

Parcel Count

Jackson County has identified an approximate parcel count of **300,000 parcels** as the basis for the work to be performed on this project.

Table 3: Jackson County parcel count breakdown

Category	Count
Residential	240,000
Agricultural	7,000
Commercial	24,000
Vacant	42.000
Exempt, immune, economic incentive	28,000
Total*	**341,000**

*Total parcel count does not equal 300,000 due to mixed use or other combinations

Purpose of the Maintenance of Assessment Records and Data Project

Tyler commits that the Maintenance of Assessment Records and Data project will conform to the standards for data collect established by the International Association of Assessing Officers (IAAO) and the Uniform Standards of Professional Appraisal Practice (USPAP 6), RSMo Section 137.082 and other applicable state statutes and ordinances, as well as, generally accepted standards within the mass appraisal industry.

Data will be prepared and collected for each task and parcel required by the County's RFP 69-19. All work related to occupancy checks, new construction and permits, and sales verification, shall be completed no later than one year from contract execution, repeated annually, and in keeping with the County's schedule. It is understood that the Director of Assessment is to serve and act as Appraiser-in-Chief and that all decisions as to final assessed valuations and procedures followed will be approved by the Director of Assessment.

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Table 4: IAAO Assessment Ratio Accuracy Statistics

Property Type	Median Value Level	COD	PRD	PRB
Single-family residential, including condos, in newer or more homogeneous areas	90% to 100%	5 to 10	.98 to 1.03	-.10 to .10
Single family residential in older or more heterogeneous areas	90% to 100%	5 to 15	.98 to 1.03	-.10 to .10
Other residential – rural, seasonal, recreational, manufactured housing, 2 – 4 unit family housing	90% to 100%	5 to 20	.98 to 1.03	-.10 to .10
Income-producing properties in larger areas represented by large samples	90% to 100%	5 to 15	.98 to 1.03	-.10 to .10
Income producing properties in smaller areas represented by smaller samples	90% to 100%	5 to 20	.98 to 1.03	-.10 to .10
Vacant land	90% to 100%	5 to 20	.98 to 1.03	-.10 to .10
All Properties	90% to 100%	5 to 15	.98 to 1.03	-.10 to .10

Market value estimates will be prepared for each parcel and the date of value for this appraisal shall be January 1, 2023, with a taxable status date as to parcel inventory of January 1, 2023 All work, except support of values, shall be completed no later than January 31, 2023. The reassessment will be completed by December 31, 2023. It is understood that the Director of Assessment is to serve and act as Appraiser-in-Chief and that all decisions as to final assessed valuations, procedures followed, and forms used in the reassessment will be made by the Director of Assessment.

To execute a project of this nature and complexity, Tyler will utilize a team approach to ensure that the County's goals and objectives are achieved. We encourage the County, and the Director of Assessment and their staff, to participate in all phases of the project, as permitted, to share in provided training, data collection activities to enable the maximum value for the County and its staff.

Purpose of the Reassessment

Tyler understands the requirements as stated in the County's RFP 2-20. One of Tyler's core competencies is the ability to conduct comprehensive reassessment projects on time and on budget so that once complete, the project exceeds industry standards for excellence.

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Our project plan for Jackson County considers the phased implementation schedule for a CAMA and tax solution, which delivers major portions of the system, and will support the appraisal field effort, followed by the valuation and analysis functions, and full assessment administration.

Tyler will consider all three methods of property appraisal, cost, market, income and expense, and utilize market valuation in Jackson County using the comparable sales approach which provides up to five comparable sales for each residential subject, and we will further refine this approach as it provides solid, defendable market-based values. In addition, this approach allows us to better reflect market activity in this uncertain economy and explain the anomalies that may occur with bank sales and foreclosures.

Communications Plan and Public Relations

Following contract signing, Tyler's team will initiate meetings with the County's representatives to formalize a communications plan. Our plan will start with a joint public relations and communications strategy between the County, Tyler, and IAAO. As a starting point, we propose the communications plan include project meetings, monthly status reports, and public information efforts. We recommend considering the established communication channels already being used effectively by the Director of Assessment's office, such as the web site, social networks, focus groups, public meeting, opportunities, etc., and look for additional points of connection.

The strength of Tyler's public information support has always been built on two major tenets: (1) analytical abilities that provide the County with rock solid data to support clear communication, and (2) an emphasis on planning so that information is targeted for the appropriate audiences according to clear objectives. To facilitate planning, Tyler's team will work closely with the County to develop key messages, clarify objectives, and identify audiences.

The communications plan will include the following major elements:

Project Meetings

1. Monthly Status Meetings - A monthly review of project progress, issues, and proposed changes. The monthly meetings are usually held the same day, time, and place each month. Items covered in the meetings will include:
   a. Updated project plan
   b. Tasks completed during the last reporting period
   c. Tasks planned for the next reporting period
   d. Tasks planned for completion during the next reporting period
   e. Anticipated staffing needs
   f. Outstanding issues; current status and plans for resolution
   g. Any issues that can affect schedules
   h. Any issues that can delay or impact the completion of the project

2. Quarterly Executive Meetings will be held with designated County representatives to discuss general project topics and to review plans for the next quarter. The intention of this meeting is to ensure visibility into project progress and facilitate open communication.

Monthly Status Reports

Tyler will submit monthly written project status reports to the Director of Assessment detailing activities, accomplishments, milestones, identified issues, and problems. Each report will include a written summary of progress during the past month, detailing the status of items in the project plan, identification of issues, and proposed resolutions.
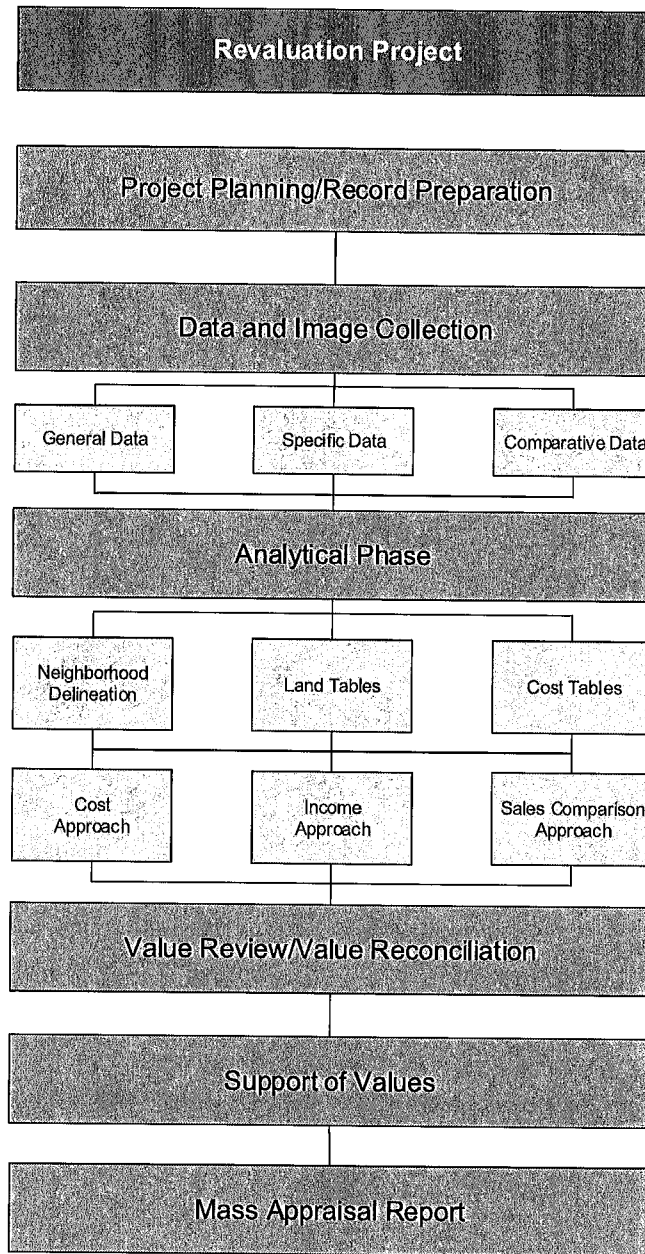
Public Information

A successful public information effort is a joint function of the Director of Assessment and the Tyler team. Tyler is aware of its highly visible role in the project. In order to achieve public awareness, understanding, and acceptance of the results of the project, the following items are part of a standard public relations package:

1. After consulting with the Director of Assessment and project management, Tyler will submit a public information plan for review and implementation.
2. Periodic regular briefings will be held with the Director of Assessment, including progress reports and discussion of problem areas and solutions.
3. A point of contact for the media may be established and such a contact should act as the project spokesperson upon request and approval by the Director of Assessment.
4. Periodic news releases can be issued prior to, during, and after the completion of the project. These releases are particularly important during project initiation and setup, and prior to and during data collection phases of the project. Writing assistance for these releases is provided by Tyler. Newspaper articles can be presented for clearance to the Director of Assessment prior to release.
5. Tyler project personnel can be available for presentations to the public, community leaders, local social/business organizations, senior citizens groups, and for appearances on radio and TV talk shows pursuant to the role Tyler takes in the assessment of real property. The Director of Assessment will join Tyler personnel in such presentations, which are typically followed by question and answer periods.
6. Tyler will provide a revaluation specific micro website to compliment the County's existing website. This micro site will be administered by Tyler in conjunction with the Assessment Office to provide detailed updates on project milestones, metrics and progress, and on the whereabouts of data collection staff, including photo's, license plates, and vehicle types.
7. Tyler will participate in general public meetings during the reassessment, as requested by the Director of Assessment.
8. IAAO Consulting will work with Tyler's team and Jackson County as a monitor for the project and in the capacity of aiding in a public relations strategy that is compliant with IAAO technical standards and meets the needs of the project under consideration

The Maintenance of Assessment Records and Data; and Reassessment Services Project

Tyler has developed a set of best practices that will be used as the blueprint for our overall approach to this joint project. There are several distinct, but related, phases or activities that take place over the course of the project, beginning with project planning and continuing through project deliverable. The chart on the following page identifies the key steps in a data collection & reassessment project. We have taken a number of these key elements essential to a successful project and provided a more detailed explanation of the steps involved in each.

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The Revaluation Process[1]

Revaluation Project

Project Planning/Record Preparation

Data and Image Collection

| General Data | Specific Data | Comparative Data |

Analytical Phase

| Neighborhood Delineation | Land Tables | Cost Tables |

| Cost Approach | Income Approach | Sales Comparison Approach |

Value Review/Value Reconciliation

Support of Values

Mass Appraisal Report

1: Adapted from the Property Assessment Valuation manual, Second Edition, Copyright 1996 by the IAAO

Figure 1: Appraisal Process Chart

Plan Approach and Timeline

Tyler's performance of its obligations under this agreement shall begin within thirty (30) days of signing with the commencement of planning and creation of a work plan, subject to the Director of Assessment's

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approval. Said work plan will indicate the starting and completion dates for all the various phases of the project.

The appraisals shall be Tyler's opinion of the true value. The appraisal of each parcel shall be considered to be made as of January 1, 2023, the Tax Lien Date, and shall reflect the status of each parcel as it exists as of January 1, 2023, also the Cutoff Date. The County shall appraise improvements partially complete on the Cutoff Date.

Table 5: Project Milestone Schedule

Activity	From	To
Summary project duration start to finish	Oct-2020	Dec-2023
Contract executed; project commenced	Oct-2020	Oct-2020
Public information - press releases, speaking engagements	Nov-2020	Dec-2023
Project office set-up	Nov-2020	Dec-2020
Data collection training staged ramp up of staff	Dec-2020	Mar-2021
Data collection	Jan-2021	June-2022
Image gathering	Jan-2021	June-2022
Pre-Review	June-2021	Sept-2022
Neighborhood delineation	Sept-2021	Oct-2022
Land tables	Aug-2021	Jul-2022
Cost tables	Aug-2021	Jul-2022
Sales verification	Jan-2021	Dec-2022
Final Value	Jul-2022	Jan-2023
New Construction	Jan-2021	Dec-2022
Occupancy/Permit review	Jan-2021	Dec-2022
Notice of Assessment Mailers	Mar-2023	Mar-2023
Informal Review	April-2023	June-2023
BOE	July-2023	August-2023
State Tax Commission	August-2023	December-2023

The deliverables for the project will be on-going throughout the project. A schedule of delivery of each component of the project can be set with the Director of Assessment, as well as a detailed work plan. This will ensure that there is a mutually agreed upon schedule of dates and expectations.

Project Monitor

A representative of the International Association of Assessing Officers (IAAO) will assume the role of monitor during the term of the project. Using the appropriate technical standards promulgated by the organization, this individual's role will be to support both the primary contractor and the County. IAAO will provide specific monitoring and consulting as necessary.

In a supporting role IAAO will use the IAAO standards as a guide to best practices. If the actions of the contractor, or any of its employees, fall short of the best practices enshrined in the standards, the monitor

will report that to both the contractor and the County through designated contact points. When the standards suggest corrective action that information will be passed along as well.

The primary standard to be utilized in this effort will be the Standard on Mass Appraisal of Real Property. This standard covers most of the areas involved in a reassessment process. One section covers collecting and maintaining property data and provides guidance on selecting the data to collect as well as establishing accuracy standards for its collection. It discusses the types of quality control procedures that form the basis for accurate valuations. It then describes the process to be followed to value property through the development of models. Then it describes how those valuation models are to be calibrated.

One of the advantages of using IAAO as a monitor is having access to the very latest industry best practices. The Standard on Verification and Adjustment of Sales is currently being revised and will soon be adopted. It does not represent a significant departure from the current standard but will reflect the latest thinking in the areas of sales data collection, verification and adjustment. The contractor will be able to train staff using the very latest information, while the county can take comfort in knowing the contractor is being held to latest standards in the industry.

Finally, the monitor will have access to the Standard on Public Relations. But just as important, he or she will be assisted by IAAO staff members and Tyler Management staff who have years of experience in several areas of media relations. The contactor can use these resources to keep the public as well as the county officials informed of every phase of the project and the county can be assured that information flow is influenced only by the best practices in the mass appraisal industry.

Parcel Inventory Review Phase

Residential Parcel Inventory Review Services

The methodology for collection, organization, workflow, public relation aspects, and compilation of such information should not be taken lightly. The vast experience, quality, consistency, and thoroughness of our process are what set Tyler apart from all other vendors.

Tyler's Field Data Collection and Quality Control processes have been internally developed and rigorously field-tested on tens of millions of parcels. Our approach will ensure a trained mass appraiser will collect objective data. To serve the County's requirements, we will implement a phased data collection and compilation effort. Our intention is to not only provide the refined characteristic information to the County, but also tools to aid the ongoing maintenance, collection, upkeep, quality control, and evolution of this information.

The onsite physical field inspection phase of the project will involve field data collectors gathering sketch information, interviewing property owners, collecting interior and exterior improvement information, and confirming prior information that has been collected. Prior to the start of this phase, property record cards (PRCs) or a digital entry point, will be created containing characteristic information from the existing database. Tyler will utilize its partner's, Data Cloud Solutions, Mobile Assessor application to build user defined fields (UDFs) for property characteristics critical to the valuation process that may be missing or need further delineation from the current database and application setup utilized in the County. Tyler's

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solution includes license costs for the additional user accounts necessary to supplement the County's existing Mobile Assessor solution. Tyler will undertake the following actions during the onsite physical inspection phase:

1. Through the Director of Assessment, Tyler will provide written notification to the Jackson County Sheriff's Department, and any other applicable law enforcement agencies, of the dates and times that fieldwork will be conducted in specific neighborhoods. This notification will be provided at least seven (7) days prior to the time that the work is to be performed.

2. At all times while on private property, all Tyler field personnel will plainly wear an identification badge containing a clear, color photograph of the individual, the company's name, the individual's name and signature, and the signature of an official designated by Tyler and approved by the Director of Assessment. Tyler's field personnel will also wear vests to further identify themselves and the project to the public.

3. Tyler suggests that the inspection of residential and agricultural properties be conducted using a systematic and routine work schedule between the hours of 8:00 a.m. and 5:00 p.m. Monday through Friday. If Saturday inspection work is required due to schedule or other circumstances, Tyler personnel will conduct those inspections between 9:00 a.m. and 4:00 p m. There will be no Sunday inspections and no inspections will be conducted before sunrise or after sunset.

4. During the initial visit to the property, Tyler data collectors and supervisory personnel will knock at the entrance, announce their arrival, identify themselves, state the purpose of the visit, collect information regarding the interior by interviewing the resident, and request permission from an adult resident to proceed with the exterior inspection of the property. After permission is granted, the field person will note changes to existing Director of Assessment's data, measure, describe, and diagram the exterior of all the improvements on the subject site. It is understood that interior inspections are not part of this effort, unless requested by the resident.

5. If no one is at the residence, the Tyler field representative will leave a door hanger/card explaining the purpose of the visit, note that an exterior measurement and inspection was conducted (if applicable), and request that the property owner contact the County Assessment Office in order to provide information about the interior. The door hanger/card will provide the property owner two options of contacting the County: (1) property owner can call a telephone number listed on the door hanger to provide interior information or ask questions; (2) property owner can fill out a section of the door hanger with the interior information regarding their home, and mail it back to the County. After leaving the door hanger, the field person will proceed to measure, describe and diagram, and collect and record all necessary data regarding the exterior of the dwelling(s) and other improvements located on each parcel. In those instances where no one is at the residence at the time of the field inspection visit, all interior information will be estimated while onsite, and verified via the call back by the taxpayer/owner to the County Assessment Office.

6. The dates and times of all inspection attempts will be permanently recorded digitally on the Mobile Assessor application from the individual field inspection effort. In addition, the identity of the field inspector shall be recorded on the mobile assessor application.

7. If the property owner refuses exterior inspections to the property or any portion thereof, the Tyler field person will courteously leave the property. In turn, Tyler will inform the Director of Assessment of each occurrence in writing on a biweekly basis. The field person will record on the Mobile Assessor application the property address, account number, date, and time of the refusal. In addition, the field representative will request the name of the person refusing the inspection, the reason for the refusal, and include all the aforementioned information on the previously described list to be presented to the Director of Assessment biweekly.

8. If any property owner refuses exterior inspections to the property, aerial and street level imagery, supplied by the Director of Assessment, will be utilized to review the property for characteristic confirmation. To assist in this effort, Tyler is also prepared to utilize other Mobile Assessor modules that are synchronized with the County's GIS, CAMA, sketch, and imagery data.

Characteristics which will be collected or verified during the Onsite Parcel Inventory Review Inspection phase include:

Land Use Code	Number of Baths and Plumbing Fixtures
Living Units	Heating Type
Address Verification	Fuel Type
Entrance Information (single most recent occurrence)	Central A/C
Story Height	Fireplace Type and Number
Style	Miscellaneous Features
Exterior Walls	Percent Complete
Year Built	Outbuildings
Occupancy	Building Sketch
Basement Finished	Attached Additions
Number of Rooms	Number of Bedrooms
Other data as needed	

Grade and condition are not part of the characteristic review but would be considered in the pre-review phase of a reassessment process. The best practices for assuring qualitative characteristics such as grade, condition, and effective age are accurately depicted, considering their impact on value, is to have these elements recorded by a more skilled, smaller group of appraisal staff from a desktop, and in tandem with early analytic review, as opposed to individually in the field at the early stages of collection.

9. The Group Leaders will be responsible for the quality and quantity of all field work performed by Tyler. The Group Leaders will review the raw data collected by the field person to ensure the accuracy of the data reported, floor plans, and measurements recorded before the data is electronically delivered.

It is understood that spot checks of the fieldwork will be conducted by the Director of Assessment and may require the Project Supervisor to accompany the Director of Assessment during those inspections. It is further understood that faulty or incorrect fieldwork shall be returned to Tyler immediately for correction, while further instructions will be provided to the field personnel as to what information was faulty or incorrect. When required, this action will occur at no additional cost to the County.

Tyler will provide a written, weekly schedule of field work, including: name of the field inspector, the vehicle type and license number of the field inspector's vehicle, the neighborhood to be inspected, and the number of days the field inspector is expected to be in the neighborhood. The Director of Assessment shall provide a copy of this schedule to the County and various police departments, as well as local news media.

Commercial and Exempt Parcel Inventory Review Services

Parallel to the residential and agricultural data collection process, commercial and exempt data collectors will visit each commercial and exempt parcel and verify, collect, and record data utilizing the Mobile Assessor application. The data collectors will make an exterior inspection of each principal structure except when a parcel is vacant, or permission is denied.

Structural features, components, or characteristics shall be identified and listed. The dates and extent of all major remodeling shall be determined and recorded in the notes section of the Mobile Assessor application. Other improvements, built-in other features and attached improvements shall be identified, measured and listed.

All uses of each structure type shall be determined at the time of inspection and recorded on the Mobile Assessor application.

A site plan will not be required for commercial and exempt properties where all necessary information can be shown on a printed data collection form sketch grid.

Characteristics which will be collected or verified during the Onsite Parcel Inventory Review Inspection phase include:

Address Verification	Central A/C
Story Height	Sprinkler System Perimeter
Use Construction Type	Wall Height
Exterior Walls	Outbuildings
Year Built	Building Sketch
Occupancy	Miscellaneous Features
Heating Type	Percent Complete
Fuel Type	Yard Improvements
Plumbing Fixtures	Other data as needed

Grade and condition are not part of this characteristic review but will be included in the next phase of a reassessment process.

Occupancy/New Construction/Permits

Tyler shall perform occupancy checks, building permit/new construction verification, miscellaneous permit checks, new plat/seg/merge checks, and natural disaster checks using parcels lists and current property record data of parcels provided by the County to Tyler. The work will include, without limitation, the following:

- Review of building permits, water department connection records, aerial photography, and other pertinent data.
- On-site exterior physical inspections to verify and document status of occupancy, and/or improvements.
- Verification of previously collected information, and appropriate corrections and adjustments as necessary using the County's Mobile Assessor application.
- All buildings and structures will be measured and digitally photographed.
- All data will be electronically delivered to the County for entry into the County database with details of each visit updated in the property data and market data files.
- All work shall be done in accordance with RSMo Section 137.082 and all other applicable statutes and ordinances.

Sales Verification and Validation Data Collection

A valid cost model requires sufficient quantity of accurate, reliable, and verified market data for a proper and effective analysis. A close examination of recent transactions within the real estate marketplace is required to isolate the bona fide arms-length transactions. Tyler has developed standardized procedures for this process using IAAO and USPAP guidelines. The sales data must be screened and processed in order to determine the degree to which it reflects the behavior of typical buyers and sellers in the open marketplace. A certain amount of mass appraisal judgment is required to understand the interactions of market factors and thus determine which ones are suitable for use in mass valuation. It is imperative that the mass appraisers are familiar with the market areas and corresponding market conditions in which sales will be validated.

The sales verification process requires the following steps:

1. Multiple Listing Service (MLS) and Certificate of Value (COV) data of parcel sales, provided to Tyler in electronic format, will be reviewed for accuracy and adjusted according to IAAO standards.
2. Field visits shall be performed and questionnaires shall be sent to sales parties when necessary. Information can be returned via Data Cloud Solution's online software application.
3. During each field visit, all buildings and structures will be digitally photographed and measured as required.
4. Previously collected information will be verified, and appropriate corrections and adjustments will be made as necessary using the County's Mobile Assessor application.

5. Codify those sales which are obviously not arm's length transactions, such as; sheriff's sales, foreclosures, tax sales, family, and intra-corporation sales. A table will be created to list all observed rejected sales.
6. All data will be electronically delivered to the County for entry into the County database with details of each visit updated in the property data and market data files.

Digital Image Collection

Tyler will take a digital photograph of each major improvement and, if warranted, one of each significant accessory structure. Photographs will be taken during data collection, as necessary utilizing the Mobile Assessor application and other means.

Quality Control

At the project level, several quality control procedures will be in place. The field data collection effort will follow these procedures:

1. The Group Leader will recheck all properties completed during the training period, typically five (5) days, by each data verifier. All noted errors are recorded on a "Quality Check Form" and discussed with the employee; corrective action is identified and taken.
2. Throughout the data collection effort, the Group Leader will review completed parcels for each employee within his/her group. A "Quality Check Form" will be completed for the parcels reviewed.
3. If the results of the quality check are satisfactory, they are discussed with the employee and the parcels are turned in to the project office for clerical quality control.
4. If the results of the quality check are unsatisfactory the quality check report is returned to the employee and one of two courses of action is taken:
   a. Parcels with a less significant degree of error, but still unsatisfactory quality, will be returned to the employee. The employee corrects the noted errors and rechecks the balance of the parcels in the packet group for similar errors.
   b. A significant level of errors requires a complete rework of the packet group by the employee.
5. Regular reviews are held between the Group Leader and data collection staff for current status regarding quality results, productivity, training and corrective actions.

Summary

Once the data entry and data mailer phases are completed by the County, the database will be ready for the County to complete the analytical phase.

Pre-Review of Grades and Condition Phase

Pre-review of collected data prior to valuation is a proven approach to enhance equity, insure the consistent application of subjective data protocols, and the verification of collection procedures. Along with subjective data, quantitative and qualitive data is verified for accuracy and inventoried to insure the property record is complete. An experienced appraisal staff member will utilize multiple data sources such as GIS mapping, property street-level imagery, aerial photography and direct access to appraisal record data via a task targeted software. The appraiser will confirm images, quality ratings, condition factors, any

missing or suspect data during the review. The Desktop Review (DTR) module is designed to assist in verifying existing data and flagging discrepancies in data quickly and efficiently via dual monitors. The configurable layout allows remote data reviewers/ appraisers to visualize all pertinent property data, photos, aerial imagery, and other assets/tools in one integrated and synchronized view. A sample of data items reviewed are listed below.

Table 6: Sample Data Items

Parcel Data	Dwelling Data	Sketch	Outbuildings	Land Data
Property Class	Images	Building Footprint	Inventory	Land Formatting
Use Code	Story Heights	Additions		External Obsolescence
Neighborhood	Style	Labels		
	Grade			
	Condition/Desirability/Utility			
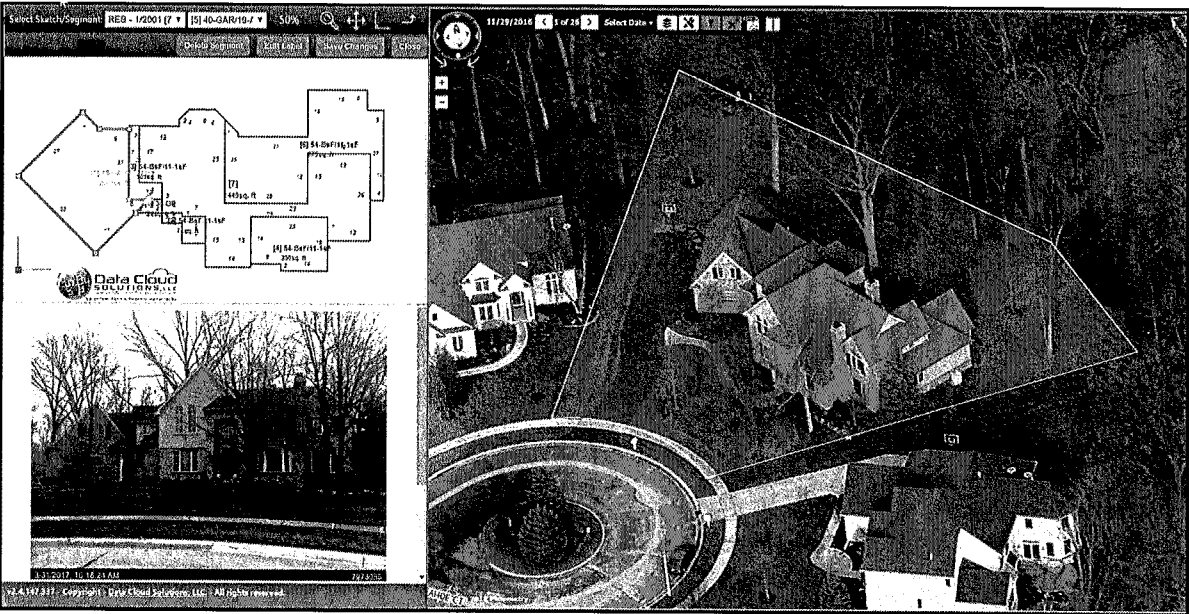
Figure 2: Desktop pre-review, street-level and oblique imagery example

In parallel to the pre-review process being completed, an experienced data collector or appraisers will visit parcels and verify, collect, and record data in areas under development or where it is determined there is need for additional information that was not obtained during the data collection phase of the project.

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Analytical Phase

The analytical phase of a reassessment relies upon the data collected in the initial phases of the Maintenance of Assessment Records project phases and the pre-review stage of the Reassessment Services project, bringing together all the components of data to use in analysis for valuation based activities, including neighborhood delineation, land table calibration, cost table calibration, and the depreciation table calibration. Cost, sales comparison, and income approaches to valuation will subsequently be analyzed to arrive at a base market value for each property.

Neighborhood Delineation

Tyler will create and/or update neighborhood boundaries and associated descriptions in support of the reassessment as described herein. We will review current established neighborhood boundaries using current GIS tools; offer appropriate modifications based upon sales analysis, then update neighborhood delineations throughout the County and submit the proposed changes to the Director of Assessment for approval prior to use.

When making recommendations, Tyler takes note that neighborhoods should physically be delineated to reflect a high degree of homogeneity in governmental, social, economic, and physical characteristics. Neighborhoods are usually - but not necessarily - outlined by boundaries, either natural or man-made. Tyler agrees that delineation of neighborhoods will be done separately for residential and commercial properties. For residential neighborhood boundaries, the appraiser will consider, at a minimum: land elevations; man-made or natural obstructions; similarity of structures; quality of construction; price range; style of homes; desirability of the area; and recent market trends. The following additional items will be considered for commercial/industrial neighborhoods: land elevation; traffic flow; class/use of properties; income ranges; rents; and zoning.

Tyler will assign or otherwise modify, when warranted, a unique number to each individual neighborhood. This number will be recorded on every parcel contained in that particular neighborhood, and will be used to determine land prices, select comparable sales, assign the appropriate income model, and to analyze market conditions versus Tyler produced value estimations prior to final review by Tyler appraisal personnel. On maps provided by the County, Tyler agrees to develop, identify, and record updated neighborhood boundaries with identification numbers that will be used to delineate neighborhoods throughout the County.

A neighborhood in iasWorld is defined as the largest geographic grouping of properties where the significant economic forces of those properties are generally uniform. A statistical profile for each neighborhood will be generated including a frequency distribution and relevant statistics for data characteristics. Examples include year built, SFLA, grade, CDU, median/mean value, median/mean selling price, medium/mean land size and style organized by neighborhood. A profile sheet will be created for each neighborhood and will contain all the relevant summary data needed for that neighborhood. This data becomes helpful for comparable sales selection in market analysis.

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08-Feb-2017 | SCHDIST 2510 | **FRANKLIN COUNTY, OH NBHD PROFILE DATA** | REVISED: Feb 2013

data for residential - i m p r o v e d p a r c e l s - card 1 only - Tax Year 2099

NEIGHBORHOOD 00105000 NBHD Desc DUBLIN-HILLIARD CSD | 2740 NBHD Group 2510 | AC Model 565 | SF Model 0 | DEPR TABLE 01 | DEFAULT GRADE B | DEFAULT CDU AV

Median Landval	53,200	Average Landval	60,305	Med SFLA	1,988	Median YRBLT	2000	Count ECNDEP 0
Median Costval	252,350	Average Costval	261,988	Min SFLA	1,092	Median Land to Total Ratio	0.21	Median Acres 0 1760
Median Mktval	262,820	Average Mktval	269,394	Max SFLA	3,900	Median ECNDEP		Revcode 1 & NULL 0

NBHD SALES RATIO SUMMARY STATISTICS

NBHD	SYEAR	SALES	MEAN	MEDIAN	WGTMEAN	MIN	MAX	PRD	COD		
00105000	2014	7	1.0638	1.0373	1.0611	0.9972	1.1945	1.0026	4.5467	Revcode 2	118
00105000	2015	6	0.9828	0.9846	0.9780	0.9208	1 1089	1 0049	5.1754	Revcode 3	0
00105000	2016	8	0.9322	0.9302	0.9330	0.9000	0.9778	0.9992	2.3561	Revcode 6	0
00105000	SUMMARY	21	0.9905	0.9778	0.9856	0.9000	1.1945	1.0050	6.1872		

GRADE Subj		GRADE Sale		CDU Subj		CDU Sales		STYLE Subjects		STYLE Sales		SFLA Subject & Sales		YRGROUP Subjects & Sales		LUC	
B	91	B	20	AV	92	AV	20	01-CONVENTIONAL	0	01-CONVENTIONAL	2	2_1000 to 1500	2	3-POSTWAR_TO_1960	3	510	116
B+2	1	C	1	FR	1	GD	1	09-COLONIAL	3	09-COLONIAL	16	3_1501 to 2000	60	4-1961_TO_1970	3	511	2
C	2	C+1	1	GD	3	VG	1	03-MULTI-LEVEL	3	11-MODERN	4	4_2001 to 2500	47	5-1971_TO_1980	3	Total	118
C+2	1	Total	22	Total	96	Total	22	05-RANCH	10	Total	22	5_2501 to 3000	6	6-1981_TO_1990	3		
C-1	1							09-COLONIAL	70			6_3001 to 3500	1	7-1991_TO_2000	77		
Total	96							10-CAPE COD	1			7_3500 and larger	2	8-2001_TO_CUR	29		
								11-MODERN	9			Total	118	Total	118		
								Total	96								

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Figure 3: Example of Neighborhood Profile

Sales Data

Tyler will examine recent sales involving the properties to be appraised and will gather validation information. The County will continuously and concurrently provide copies of all sales information available with respect to transfers of parcels occurring from January 1, 2019 through the duration of the project.

The sales will be categorized by neighborhood and property classification, and valid sales will serve as the comparable sales database to accommodate the application of the market approach to value.

Sales Verification and Validation

Building on the data collection phases of the project valid cost models requires sufficient quantity of accurate, reliable, and verified market data for a proper and effective analysis. A close examination of recent transactions within the real estate marketplace is required to isolate the bona fide arms-length transactions. Tyler has developed standardized procedures for this process using IAAO and USPAP guidelines. Sales data will continue to be screened and processed in order to determine the degree to which it reflects the behavior of typical buyers and sellers in the open marketplace. A certain amount of mass appraisal judgment is required to understand the interactions of market factors and thus determine which ones are suitable for use in mass valuation.

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Appraisal of Land

Once the neighborhood boundaries have been identified, experienced appraisers will analyze sales of vacant land in each neighborhood. In cases where the sample of vacant sales is inadequate, land residual techniques will be utilized. All land will be valued as if vacant.

Land tables will be built for each neighborhood based on a typical size for the area. Deviations from the norm will be adjusted using the appropriate incremental values derived from the market. Positive or adverse influences and various land breakdowns on use will be done at the parcel level. Factors which affect the value include such things as location, size, shape, topography, access to railroads, roads, waterways, use and other influences will be considered in establishing final values.

The allocation of land and building values will be derived from the market. A separate land value plus building value will equal total value. Tyler will establish its opinion of unit land values – expressed in acreage, front foot, site, or square feet – consistently throughout the County.

Such values and unit of comparison will be approved by the County prior to being utilized. Once approved, Tyler will load the updated tables into the County's CAMA system. Parcel splits and combinations will be appraised by Tyler.
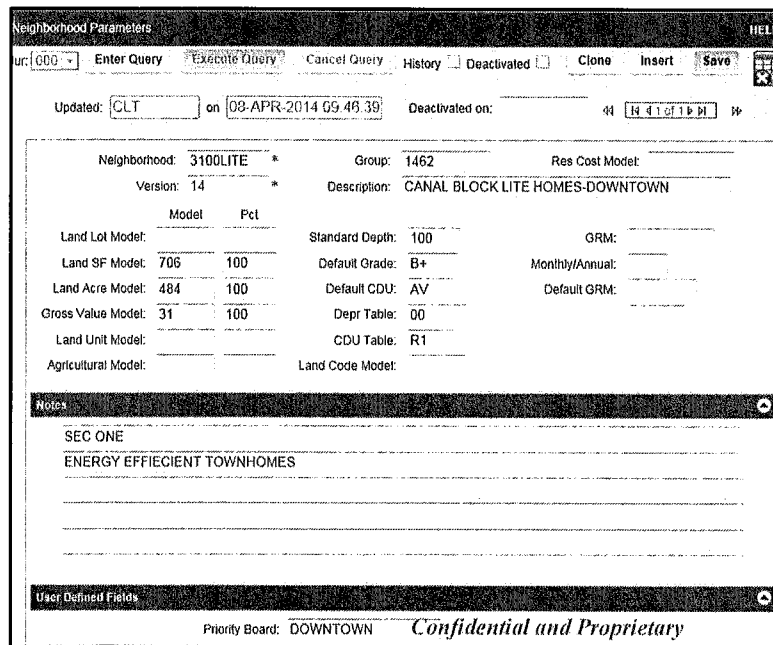
Figure 4: Sample iasWorld Neighborhood Parameters

Figure 5: Sample iasWorld Land Model

Value Review Guidelines

Tyler will collect, record, and analyze general supporting data to serve as a basis for the development of guidelines for cost, market and economic coefficients needed when applying the three (3) approaches to value. The general supporting data to be analyzed will include cost data, lease data, economic data and sales data.

The guidelines that will be developed from this analyzed data will include replacement cost schedules, depreciation schedules, economic rent schedules, income capitalization rates, comparative property sale units, unit land values, and gross income multipliers.

Tyler shall prepare a report and deliver it to the Director of Assessment for approval showing the results of this comprehensive analysis. It shall contain a set of recommendations, including a proposed pricing schedule prepared by Tyler and encoded by Tyler based upon existing tables in the CAMA system. The pricing schedule will be based on a Tax Lien Date of December 31, 2023 and will be approved by the Director of Assessment prior to determination of final values.
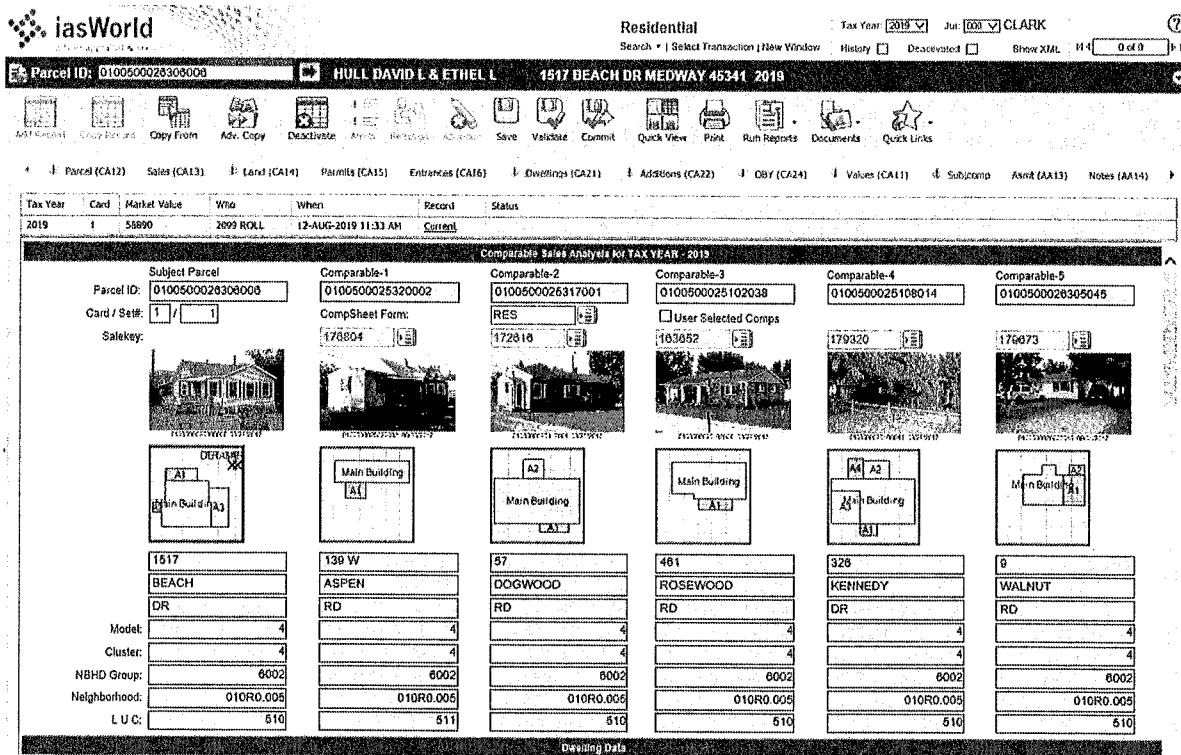
Figure 6: Example of comparable grid

Details of Residential Improvement Cost Table Calibration and Index

Methodology

The local construction cost index is the ratio of the cost to construct a dwelling in one location compared with the cost to construct the same dwelling in another location at a given date. The cost schedules will be calibrated to closely reflect the region encompassing the county.

The cost index will be developed from an analysis of sales of newly constructed, average quality dwellings located within the county and/or sales of "relatively" new, average quality dwellings which have been properly adjusted for time. This is a four-step process that should be completed in the following order:

- Develop a market trend based on re-sales of improved residential properties within the county.
- Trend the construction costs for each new dwelling to be used in the index study to an estimate of the reassessment date.
- Calculate a cost ratio for each new dwelling by comparing the iasWorld Replacement Cost New (RCN) to actual construction costs.
- Analyze the individual cost ratios and correlate an overall local construction index.

In the event that a sufficient number of newly constructed, average quality dwellings are not available to adequately document the local index, supplemental sources may include contractors' cost estimates of stock or standard building plans.

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Index Calculation

The calculation process to establish the local index is as follows:

Trend all sales to be used in the index study to December 31, 2023 using the monthly trending factor established in the market trend analysis.

Subtract the land value estimate from each adjusted sales price. The result is the indicated dwelling or building residual value.

Obtain the Replacement Cost New for each dwelling through iasWorld.

For each sample, divide the indicated dwelling residual value by the iasWorld "Base Value." The result is the index factor for the improvements.

Calibrating the Residential Depreciation Tables

The iasWorld residential accrued depreciation or percent good tables are a matrix which is set up by the "Year Built" and the "Condition, Desirability, and Usefulness" (CDU) rating of the dwelling. The tables will be calibrated to reflect the local market conditions for the county. The calibration process is completed by analyzing verified sales which are contained in the sales history file.

Commercial and Industrial Valuation

Neighborhoods

Delineation of neighborhoods for commercial and industrial properties is a primary driver in the valuation of land, the application of the income approach and the application of the cost approach.

Significant characteristics in defining neighborhoods include:

- Physical boundaries
- Natural - as rivers, streams, woods, etc.
- Manmade - as roads, railroads, power lines, etc.
- Building characteristics: type, quality, age, and condition
- Type of occupancy: such as industrial, apartment, retail, and office.
- Current zoning: Preexisting nonconformity and development rights
- Typical land size and land valuation
- Sale prices
- Economic Forces: In most circumstances, properties will compete within the same immediate neighborhood.

The delineation process will involve the following procedures:

- Establish base neighborhood delineation maps from the County's tax maps.
- Each defined neighborhood will be driven and analyzed in the field. Based on physical observation and the other factors previously mentioned, the neighborhood boundaries could be:

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- Deleted and the properties included in an adjoining neighborhood when economic conditions indicated they were similar, OR
- Create a new neighborhood from part of an existing neighborhood where there was clear indication that the economic level of value and/or similarity is different from that of its original proposed neighborhood
- Upon completion of the field review, the boundaries will be refined down to the parcel level as part of the computer database utilizing the iasWorld CAMA system.

Approaches to Value and Appropriate Units of Comparison

There are three accepted approaches or methods to arrive at value. The cost approach provides an estimate of value based upon the replacement cost of the improvements, less depreciation, plus the value of the land. The income approach estimates value by capitalizing the net operating income of a property. The market or sales approach estimates value by comparing similar properties to the property being appraised.

For the 2023 Reassessment of commercial and industrial properties, models will be calibrated to predict fair market value using two approaches, the income approach and the cost approach. The income approach best reflects the actions and motivations of investors who buy certain types of commercial properties in the county but is not applicable for every type of property appraised (vacant lots, certain manufacturing, service stations to name a few).

Unlike residential properties, the appraisal of commercial and industrial properties requires utilizing multiple units of comparison to arrive at an accurate value estimate. Units of comparison are those variables or characteristics that investors use in making decisions in purchasing commercial and industrial properties.

Units of comparison enable appraisers to distill value to a specific rate such as rent/square foot so that comparison may be made with properties that are somewhat dissimilar.

County commercial and industrial properties will be analyzed with the following units of comparison:

- Sale Price/acre
- Income or Sale Price/square foot
- Income or Sale Price/apartment unit
- Income or Sale Price/parking space
- Income or Sale Price/hotel room
- Sale Price /nursing bed
- Cost/square foot
- Sale Price per square foot or acre of land

Using different units of comparison is not intended to produce higher values, just more valid and reliable values. In general, rate/square foot and rate/per unit (such as apartments and hotels/motels) will be the most common unit of comparison in the county.

Cost Approach Overview

Land Values and Models

Land models will be created for the reassessment to accommodate the land valuation for parcels in the commercial, industrial and apartment classes of property. Each of the models has rates which will be applied to individual parcel land formats by location and land code.

Locations will be identified for each parcel in each neighborhood. The possible location options could be:

1. Central Business District
2. Perimeter Central Business District
3. Major Strip
4. Secondary Strip
5. Neighborhood/Spot (Includes apartments 4-6 units)
6. Industrial Site
7. Apartment/Condominium Site
8. Business Cluster
9. Commercial/Industrial Park

Wherever possible, the land model rates will be developed from an analysis of valid vacant land sales located within each model and location. Though there will be vacant land sales for the reassessment, it is unrealistic to expect that sufficient sales data would exist for every unique location within each neighborhood model. Where no vacant sales exist in a given location, comparative rates used in similar models will be used to determine the desired rates.

Building Cost

The cost approach provides an estimate of value based upon the replacement cost of the improvements, less depreciation, plus the value of the land.

Replacement cost means replacing the improvement with an improvement of the same utility; reproduction cost only equals replacement cost when a building is relatively new.

Local costs will be researched by using actual construction costs within the county. Since various construction types are necessary for different uses, several costs will be developed for basic structure codes such as hi -rise offices, banks, retail space, etc. The cost table will also be updated to account for items such as interior finish, heating, plumbing, air conditioning, etc. for the various uses.

The quality grade of materials and workmanship is one of the most significant adjustments to be made in the cost approach. Many buildings with similar square foot areas and uses can vary significantly in cost due to quality of materials and workmanship. The mass appraiser will analyze these characteristics in order to arrive at an estimate of quality grade.

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In addition to the independent research outlined above, we will use accepted cost indexing services as a check against our replacement cost tables. We will compare the results with our verified costs to reinforce our locally obtained costs.

Depreciation

Depreciation is defined by the IAAO as: "Loss in value of an object, relative to its replacement cost new, reproduction cost new, or original cost, whatever the cause of the loss in value." Basically, depreciation is loss in value due to any cause. The three types of simple depreciation are:

Physical Depreciation

Physical depreciation is defined by the IAAO as "arising solely from a lowered physical condition of the property or a shortened life span as the result of ordinary use, abuse, and action of the elements."

In general, physical depreciation is due to deterioration or "wear and tear" over time.

Functional Depreciation (or Functional Obsolescence)

Functional Obsolescence is defined by the IAAO as: "A decrease in the value of a property occasioned solely by shifts in demand from properties of this type to other types of property and/or to personal services."

In general, functional depreciation is due to the loss of a buildings ability to function as efficiently as a modern building (an old-style heating system versus a modern HVAC system).

Economic Depreciation

Economic depreciation is defined by the IAAO as: (1) "Depreciation due either (a) to an increase in supply of the property under consideration or (b) to a reduction in monetary demand for properties of the type under consideration unaccompanied by shifts in demand from such properties to other properties and/or personal services (preferred). (2) Depreciation of any sort other than physical depreciation." Economic depreciation is due to factors outside the property. The location of the property may also be a cause of economic depreciation.

Depreciation in Mass Appraisal

The age life method considers how long a property will be considered economically viable, or the economic "life" of a property. Depreciation on a parcel level is based on multiple data elements which take into account the age of the building, the structure and construction type of the building, and the observed condition and utility. The structure and construction type will form the basis of the expected life, and the observed physical and functional condition ratings will estimate the percentage of depreciation to determine the value of the building in its current condition.

Market Analysis Overview

During this step of the valuation process, Tyler will use the analytical tools in iasWorld to develop markets for residential improved parcels, where possible. Therefore, both the cost and comparable sales approach will be considered when arriving at the final estimate of value. When applicable, up to five comparable sales for each subject will be available for review. This comparable sales approach allows us to better

reflect market activity in this uncertain economy and explain the anomalies that may occur with bank sales, foreclosures and other distressed sales. A market model is a statistical picture of the elements affecting sale price within the market area. By determining the relative effect of specified property characteristics on sale price, markets will be constructed and used to predict value for unsold properties.

Income Approach Overview

The income approach is defined by the IAAO as:

"The concept that current value is the present worth of future benefits to be derived through income production by an asset over the remainder of its economic life. The income approach uses capitalization to convert the anticipated benefits of the ownership of property into an estimate of present value."

In mass appraisal, there are two major elements of the income approach that must be defined. The first is determining the market capitalization rate that typical investors will require to purchase different types of property. The second is estimating the expected Net Operating Income on a property when the actual NOI may or may not be known. The estimation of Net Operating Income of different types of properties is derived from three factors: the expected gross rental income of the property, the expected occupancy of the property, and the expected operating expenses of the property.

Capitalization Overall Rate Development

Income producing properties are assets that offer a return on, and a return of, an investment. Investors buy property in order to receive income which represents a return on their investment. That return is measured in many ways but the standard that is used by appraisers most often to summarize investment rate of return is the capitalization rate or CAP rate; calculated by dividing net income (NOI) by purchase price. Net income is calculated by subtracting from the property's rental income if fully occupied, any shortfall due to vacancies and credit losses, and all operating expenses except for real estate taxes and debt service. For assessment purposes, the expense of real estate taxes is incorporated into the overall capitalization rate (OAR) as an effective tax rate for the municipality.

Where income and expense information are available for commercial and industrial properties that have sold, it is possible to derive direct capitalization rates. This is preferred to alternative techniques such as Band of Investment because it is based on a property's actual as opposed to pro forma financial performance and reflects the expectations of investors in a competitive marketplace.

Income and Expense Valuation

Economic data will be collected from the local marketplace and used to develop Income Valuation Models. These models contain typical rents, expenses, and capitalization rates for the various income use groups. The appraiser can make parcel level adjustments to the income valuation components generated by the Income Models.

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Final Value Review

Residential and Agricultural

After the creation of market values and in accordance with IAAO and state statutes; Tyler will appraise each property. This review will be made property-by-property to eliminate errors in data entry, judgment, and computations that might have occurred. The mass appraiser will conduct the final review using the technology of advanced desktop verification loaded with current CAMA data, and an initial value estimates showing both a predicted cost and market value. The mass appraiser determines that the structures have been properly described and valued so as to assure the use of the proper schedules for computing replacement cost new; shall make a judgment as to the grade of construction and depreciation of each structure; shall consider indicated value of the structure and indicated value of the land against sales information concerning comparable properties and shall make a determination on the judgmental factors which affect the estimated value.

Commercial and Industrial

Similar to the phase above, mass appraisers review the value estimates, verify observable data, adjust the value estimates for any changes, choose the final valuation methodology reconciling the cost and income approaches and ensure that like properties are appraised equitably. Tyler will appraise all utility properties in the same manner as other industrial properties.

Performance Standards

Upon completion of the final review, Tyler shall submit to the Director of Assessment the results of a formal sales ratio study. Table 6 describes the performance standards which will be met on this project.

Table 7: IAAO Performance Standards

Class	Standard
Single Family Residential over 15 years old	COD less than 15%
Single Family Residential less than 15 years old	COD less than 10%
All other improved stratum or classes	COD of less than 15%
All other vacant stratum or classes	COD of less than 20%

Appraisal Quality Control

It is important for the County to know that Tyler is dedicated from the top down to delivering quality work. A primary element of management's job is to ingrain this precept into the culture of all new employees and to build upon it during their careers. Quality in a service business can be a difficult concept to define. Tyler's definition consists of five basic components:

1. Understanding what is to be done.
2. Defining what constitutes successful completion of each project activity.
3. Gaining assurance that the County shares this understanding.
4. Doing this work on time.

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5. Getting recognition of success from the County.

A detailed quality control plan is outlined below:

At the project level, several quality control procedures will be in place. For review, personnel will follow these procedures:

1. The supervisor will recheck all properties completed during the training period, typically five (5) days, by each data verifier. All noted errors are recorded on a QC form and discussed with the employee; corrective action is identified and taken.
2. Throughout the review effort, the supervisor will review completed parcels for each employee within his/her group. A "Quality Check Form" will be completed for the parcels reviewed.
3. If the results of the quality check are satisfactory, they are discussed with the employee and the pack is turned in to the project office for clerical quality control.
4. If the results of the quality check are unsatisfactory the quality check report is returned to the employee and one of two courses of action is taken:
   a. A pack with a less significant degree of error but a still unsatisfactory quality report is returned to the employee. The employee corrects the noted errors and rechecks the balance of the cards in the pack for similar errors.
   b. A significant level of multiple significant errors requires a complete rework of the pack by the employee.
5. Regular reviews are held between the supervisor and all staff for current status regarding quality results, productivity, training and corrective actions.
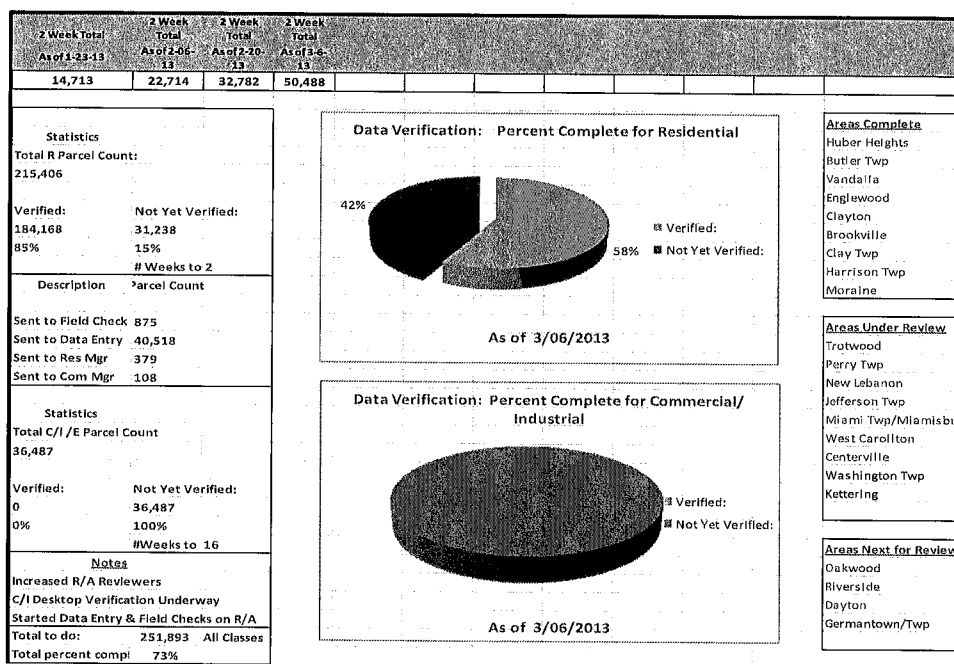

Figure 7: Tyler's Appraisal Data Verification Bi-Weekly Reporting

Support of Values

Tyler's Conduct of Informal Reviews

The County will mail each taxable property owner a notice showing their tentative value. Tyler will have an informal discussion with the owner or agent who requests the same during the specified period at a location provided by the County. Tyler will be responsible for all informal reviews filed as a direct result of this reassessment which are requested within the timeframe scheduled for setting appointments.

Results of Informal Reviews

The County will mail a notice to all property owners who attended an informal review or whose values were changed during the informal process of the final value that Tyler will recommend to the County.

Formal Appeals to the County

Tyler will, upon request, support the Assessment Department and Appeal Board regarding formal appeals filed with the Board as a result of the reassessment for the 2023 tax year. These services would be provided at negotiated terms.

Litigation Support

Tyler will, upon request, participate in all appeals to the courts taken and processed in accordance with administrative or statutory procedures from any individual assessment or group action, including a challenge in general to the methodology or procedures used by Tyler in the reassessment, which is computed from Tyler's appraised value provided that the first stage of the appeal has commenced within the time allowed. The County will give Tyler copies of all documents involved in any complaint or appeal, prior notice to permit scheduling and travel to any conference or hearings at which Tyler's representative is requested to be present, and prompt notice of the cancellation or postponement of the same. These services would be provided at negotiated terms.

Mass Appraisal Report

A mass appraisal report will be provided to the Director of Assessment as a summary of the work performed during the 2023 Jackson County Reassessment project. This report is intended to complement, but not replace, the supporting materials that will be provided to the Director of Assessment in the form of interim reports, quality audit reports, and appendices, as well as procedural and training materials throughout the project.

This summary report will serve to define, summarize, and document the standards followed and the process associated with the data verification, value review, analysis and reporting necessary to render a credible opinion of true value(s) in accordance with Missouri Statutes, IAAO technical standards and "Standard 6" of the Uniform Standards of Professional Appraisal Practices.

Client Responsibilities

The following details the responsibilities of the County during this project.

Use of County Records

The Director of Assessment agrees that Tyler shall utilize the County's computer systems and software including, but not limited to, the County's real estate appraisal software, the Geographic Information System (GIS) software and the aerial photography software to complete this update and that its accessibility is an integral part of the success of this program. The County shall make the computer system and its technicians available to Tyler on a timely basis. Both parties recognize the importance of this relationship to complete all tasks in a timely manner.

CAMA Access and Computer Processing and Supplies

The County will be responsible for all labor costs required to operate the computers and for providing the use of computers during normal working hours. All costs associated with computer hardware, tablets, dedicated phone lines, data connections, external data connections, base existing licenses of Mobile Assessor currently owned by the County, and associated items would be the responsibility of the County.

Multiple Listing Service (MLS) and Certification of Values (COV)

The County shall provide Tyler with a list of sales parcels to be reviewed and provide access to the MLS and COV sources as necessary to complete the sales verification process.

Doorhangers

The County will be responsible for fielding the phone calls from property owners and processing doorhangers for data characteristic updates. The cost of the doorhangers and processing is the responsibility of the County.

Data Mailers

The County will prepare a mailer to be sent to each improved taxable residential property owner on County letterhead listing certain data on file for their parcel. This data will include such items as improvement descriptions, and recent sales data. Owners will be asked to review the data for accuracy and return the mailer to the County with corrections, if any. The County will provide staff to answer questions as a result of the mailers. Returned mailers will be reviewed by the County and appropriate action taken, which would include changing the data as indicated by the owner, performing a field check, calling the owner for clarification, or determining that the owner's change is a misinterpretation of the data. Cost of the data mailers and processing is the responsibility of the County.

Data Entry

As the field work is completed during the Parcel Inventory Review phase of the project, digital information and PRCs will be returned to Tyler's local office in Jackson County for delivery to the County in an electronic format. If electronic format for individual parcels is not obtained, the County will receive said individual parcels in paper form. The County shall be responsible for all data entry of all Parcel Inventory

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Review, Occupancy/New Construction/Permits, and Sales Verification parcels completed by Tyler that are not otherwise handled by the Mobile Assessor data synchronization process.

Parcel Identification Characteristics/Data

The County shall provide electronic CAMA data for each parcel, correct and current as of the most recent tax lien date prior thereto, consisting of the owner's name and mailing address, parcel identification number, legal description, improvement characteristics, and such information shall be presumed to be correct. Corrections to such information shall be made at the County's expense.

Tax Maps

The County shall provide electronic maps (GIS information) covering all parcels, correct and current as of the most recent tax lien date prior thereto. Each map shall be drawn to scale, be identified by a map number and taxing jurisdiction, delineate each parcel, sufficiently specify its dimensions so that its size may be determined, show recorded easements and restrictions, and such information shall be presumed to be correct. Corrections to such information shall be made at the County's expense.

The County shall supply Tyler with an electronic version of the County's GIS parcel layer and available aerial photography. The GIS layer shall accurately indicate the area, acreage, or dimensions of each lot, tract, or parcel of land in the county with the parcel identification number.

The County shall provide Tyler with a GIS layer updated for corrections to any descriptions due to splits, new subdivisions, or any other changes to parcel property lines.

Facilities

Tyler's project office, utilities, local telephone services shall be provided by the County. Except as may be specifically provided for in the contract, all vehicles and office supplies required by Tyler for the project shall be provided or paid for by Tyler. The County shall supply office furniture and computers for Tyler's use during the project. Typically, an area of 600-800 square feet of office space is required for the duration of the project.

Additional Information

The County shall further assist Tyler by providing or making available such other information which the County possesses or is conveniently available to them, including, but not limited to, general assessment records or information necessary for Tyler to successfully complete it responsibilities under this agreement.