

**BOARD OF COMMISSIONERS**

**AGENDA**

**Monday, May 9, 2016 - 6:30 PM**

Pledge of Allegiance

Notice of Executive Session on May 9, 2016

1. Consent Agenda

- a) Disbursement Review and Approval: 2016-04D and 2016-04E
- b) Resolution #2016-59 - Further amending the 2016 Wage and Salary Schedule
- c) Resolution #2016-60 - Authorize Township Manager to Execute Contract with Tyler Technologies for ERP Purchase & Implementation
- d) Consideration of a Motion to Approve the Certificate of Appropriateness:
  - HARB-2016-04 – 406 North Wayne Avenue - Demolish existing single family dwelling and construct new single family dwelling, garage and pool – Amended. Referred back from the Board of Commissioners.
  - HARB-2016-06 – 401 Midland Avenue - Removal of non-original addition at rear of house and construct new two (2) story addition.
  - HARB-2016-07 – 414 Radnor Street Road - Addition to the rear of the house and a new garage.
  - HARB-2016-08 – 19 Louella Court - New construction of a partially underground concrete garage.
- e) Motion to authorize John Rice to attend the Zoning Hearing Board meeting and oppose the following: **Appeal #2968** - The Applicant, Villanova University, property located at 800 E. Lancaster Avenue and zoned PI, seeks a variance from Section 280-68.1.D(3)(g) of the Zoning Code regarding “Dark Sky” full-cutoff requirements.
- f) Resolution #2016-61 - Authorization for Gilmore and Associates to Provide Survey, Design, Construction Drawings, Specifications, and Bidding Documents for the Installation of Traffic Calming Medians on Pine Tree Road
- g) Motion to Authorize the Engineering Department to Receive Sealed Bids for the Installation of Traffic Calming Medians on Pine Tree Road

2. Public Participation

3. Committee Reports

***PUBLIC SAFETY***

- A. Ordinance #2016-06 (***Introduction***) - Amending The Code Of The Township Of Radnor, Chapter 270, Vehicles And Traffic, Section 270-30, Time Limit Parking
- B. Ordinance #2016-07 (***Introduction***) - Amending The Code Of The Township Of Radnor, Section 270-13, One-Way Streets, Section 270-16 Stop Intersections And Section 270-28, Parking Prohibited On Meredith Avenue

***PERSONNEL & ADMINISTRATION***

***COMMUNITY DEVELOPMENT***

***PUBLIC WORKS & ENGINEERING***

***FINANCE & AUDIT***

***PARKS & RECREATION***

***LIBRARY***

***PUBLIC HEALTH***

Old Business

New Business

- The Carol H. Axelrod Memorial Blood Drive
- Villanova CICD CARE Group Update

Public Participation

Adjournment

**RADNOR TOWNSHIP**  
**DISBURSEMENTS SUMMARY**  
**May 9, 2016**

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The table below summarizes the amount of disbursements made since the last public meeting held on April 25, 2016. As approved by the Board, the Administration is now making weekly accounts payable disbursement batches and publishing those lists on the Township's web site at the following link. Please refer to those files for a detailed listing of the amounts paid by vendor by account code.

Link: <http://www.radnor.com/egov/apps/document/center.egov?path=browse&id=22>


Fund (Fund Number)	2016-4D April 22, 2016	2016-4E April 29, 2016	Total
General Fund (01)	483,950.99	150,926.19	\$634,877.18
Sewer Fund (02)	21,525.54	63.34	21,588.88
Storm Sewer Management (04)	0.00	3,545.00	3,545.00
Capital Improvement Fund (05)	39,967.00	9,238.64	49,205.64
OPEB Fund (08)	130,849.27	0.00	130,849.27
Escrow Fund (10)	1,200.00	0.00	1,200.00
Police K-9 Fund (17)	78.28	0.00	78.28
Parks & Open Space Fund (22)	1,120.20	1,120.20	2,240.40
The Willows Fund (23)	710.69	282.85	993.54
Park & Trail Improvement Fund (501)	0.00	54,278.75	54,278.75
<b>Total Accounts Payable Disbursements</b>	<b>679,401.97</b>	<b>219,454.97</b>	<b>\$898,856.94</b>
<i>Electronic Disbursements</i>	n/a	n/a	836,800.00
<b>Grand Total</b>	<b>679,401.97</b>	<b>219,454.97</b>	<b>\$1,735,656.94</b>

In addition to the accounts payable checks, the Township also has various electronic payments including payroll, debt service, credit card purchases and fees as well as others from time to time. The attached table reflects all of the electronic payments made since the last public Board meeting as well as those anticipated prior to the next Board meeting.

The Administration has adopted various internal control and processing procedures to insure that amounts obligated are within the budgetary limits established by the Board of Commissioners. Those procedures are monitored on a daily basis by members of the Finance Department and responsible employees of the various departments. The amounts included in the table above have been scrutinized as part of the internal control and processing procedures and have obtained the required approvals prior to disbursement.

If you should have any questions, please contact the Finance Department.

Respectfully Submitted,




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William M. White  
 Finance Director

**ELECTRONICALLY PAID DISBURSEMENT LISTING**  
**Estimated Through May 23, 2016**

Description	Account No.	Date	Purpose	Amount
Credit Card Revenue Fees - Estimated	Various Funds	5/10/2016	4/16 Credit Card Revenue Processing Fees	\$6,000.00 *
Payroll [Bi-Weekly] Transaction - Estimated	01-various	5/5/2016	Salaries and Payroll Taxes - General Fund	\$400,000.00
Payroll [Bi-Weekly] Transaction - Estimated	02-various	5/5/2016	Salaries and Payroll Taxes - Sewer Fund	\$15,000.00
Payroll [Bi-Weekly] Transaction - Estimated	17-various	5/5/2016	Salaries and Payroll Taxes - K-9 Fund	\$400.00
Payroll [Bi-Weekly] Transaction - Estimated	01-various	5/19/2016	Salaries and Payroll Taxes - General Fund	\$400,000.00
Payroll [Bi-Weekly] Transaction - Estimated	02-various	5/19/2016	Salaries and Payroll Taxes - Sewer Fund	\$15,000.00
Payroll [Bi-Weekly] Transaction - Estimated	17-various	5/19/2016	Salaries and Payroll Taxes - K-9 Fund	\$400.00
<b>Period Total</b>				<b>\$836,800.00</b>

Submitted:



\* Credit card fees are charged to the Township's accounts on the tenth of the month

<u>Original Estimate</u>			<u>Actual Amount</u>
\$400,000.00	4/21/2016	Salaries and Payroll Taxes - General Fund	\$482,795.24
\$15,000.00	4/21/2016	Salaries and Payroll Taxes - Sewer Fund	\$14,675.30
\$0.00	4/21/2016	Salaries and Payroll Taxes - Willows Fund	\$0.00
\$400.00	4/21/2016	Salaries and Payroll Taxes - K-9 Fund	\$271.28
<u>\$415,400.00</u>			<u>\$497,741.82</u>

**RESOLUTION NO. 2016-59**

**A RESOLUTION OF RADNOR TOWNSHIP, DELAWARE COUNTY, PENNSYLVANIA, AMENDING THE 2016 WAGE AND SALARY SCHEDULE**

*WHEREAS*, Section 6.05 of the Radnor Township Home Rule Charter requires that the Board of Commissioners adopt human resource policies and procedures as part of the Township's Administrative Code; and

*WHEREAS*, the Administrative Code establishes pay-setting practices based upon applicable Federal, State and Township laws; and

*WHEREAS*, the Board of Commissioners adopted Resolution 2015-126 on December 14, 2015 establishing the 2016 Wage and Salary schedule for all Township employees; and

*WHEREAS*, pursuant to the Township's Collective Bargaining Agreement with the Fraternal Order of Police, Police Officers assigned to the Detective Unit receive an increase in pay; and

*WHEREAS*, in the effort to promote fiscal transparency, the Board wishes to amend the 2016 Wage & Salary Schedule to reflect the change in wages to Employee #153 who has been assigned from a patrol officer to the Detective Unit.

*NOW, THEREFORE*, be it hereby *RESOLVED* that the Board of Commissioners of Radnor Township does hereby adopt the amendment to the 2016 Wage and Salary Schedule for fiscal year 2016 as follows:

Department	Position	Emp#	Approved 1/1/2016 Rate	Amended 2016 Rate
Police	Detective	153	\$41.8204	\$45.1660

*SO RESOLVED*, at a duly convened meeting of the Board of Commissioners of Radnor Township conducted on this 9<sup>th</sup> day of May, 2016.

RADNOR TOWNSHIP

By: \_\_\_\_\_  
Name: Philip Ahr  
Title: President

ATTEST: \_\_\_\_\_  
Name: Robert A. Zienkowski  
Title: Township Manager / Secretary



## Radnor Township

# PROPOSED LEGISLATION



**DATE:** May 9, 2016

**TO:** Board of Commissioners

**FROM:** William M. White, Finance Director

**LEGISLATION:** Resolution 2016-59 amending the 2016 Wage and Salary schedule to incorporate the increased wages for a Patrol Officer being assigned to the Detective Unit.

**LEGISLATIVE HISTORY:**

(1) The Board of Commissioner entered into a Collective Bargaining Agreement (“CBA”) with the Fraternal Order of Police (“FOP”) on May 19, 2014 as incorporated in Resolution 2014-49.

(2) The Board of Commissioners adopted Resolution 2015-126 on December 14, 2015 establishing the 2016 Wage and Salary schedule for all Township employees.

**PURPOSE AND EXPLANATION:** During the Executive Session at the April 25, 2016 Meeting, the Board of Commissioners approved the promotion of a Patrol Officer being assigned to the Detective Unit. In an effort to promote fiscal transparency, this resolution is being presented to amend the 2016 Wage & Salary Schedule to incorporate the increased wages for the Officer being assigned to the Detective Unit.

**FISCAL IMPACT:** This increase was budgeted and equates to an increase in pay of \$3.3456 per hour, pursuant to the CBA with the FOP. On an annual basis, the impact is approximately \$7,500 (wages plus payroll taxes).

**RECOMMENDED ACTION:** The Administration respectfully recommends that the Board adopt this resolution at the May 9, 2016 Board of Commissioner meeting.

**RESOLUTION 2016-60  
RADNOR TOWNSHIP**

**A RESOLUTION OF RADNOR TOWNSHIP, DELAWARE COUNTY,  
PENNSYLVANIA AUTHORIZING THE TOWNSHIP MANAGER TO ENTER  
INTO AN AGREEMENT WITH TYLER TECHNOLOGIES INC. FOR THE  
PURCHASE AND IMPLEMENTATION OF AN ENTERPRISE RESOURCE  
PLANNING (ERP) SYSTEM**

*WHEREAS*, The Board of Commissioners adopted Resolution 2013-129 on October 28, 2013 which allocated \$1,000,000 of an \$8,000,000 business tax settlement specifically towards the purchase and implementation of an ERP system; and

*WHEREAS*, The Board of Commissioners adopted Resolution 2015-118 on November 23, 2015 authorizing the administration to negotiate with Tyler Technologies for an ERP software system either through a cloud-based system or to be hosted on site; and

*WHEREAS*, The Board of Commissioners adopted Resolution 2016-42 on March 14, 2016 approving the purchase of updated IT networking and infrastructure which will provide the Township with the capabilities to host the ERP on-site which carries a significantly lower license and service cost; and

*WHEREAS*, the Citizens Audit Review & Financial Advisory Committee (“CARFAC”) has worked hand-in-hand with the Administration during the two plus year system review, evaluation, demonstration, selection, and negotiation process and fully supports the agreement and statement of work incorporated herein; and

*WHEREAS*, CARFAC and the Administration have negotiated a License and Service Agreement and Statement of Work attached hereto.

*NOW, THEREFORE*, it is hereby **RESOLVED** that the Board of Commissioners of Radnor Township hereby authorizes the Township Manager to execute an agreement with Tyler Technologies Inc. for the purchase and installation of an ERP system at a one-time price not-to-exceed \$507,431 plus \$68,500 for travel and expenses to be paid entirely from the Township’s ERP set-aside account to include an ongoing services agreement cost of \$48,282 to begin in year 2 and to grow as set forth in the agreed terms.

**SO RESOLVED**, at a duly convened meeting of the Board of Commissioners of Radnor Township conducted on this 9<sup>th</sup> day of May, A.D., 2016.

RADNOR TOWNSHIP

By: \_\_\_\_\_  
Name: Philip Ahr  
Title: President

ATTEST: \_\_\_\_\_  
Robert A. Zienkowski  
Township Manager / Secretary

# Radnor Township

## PROPOSED LEGISLATION



**DATE:** May 9, 2016

**TO:** Board of Commissioners

**FROM:** William M. White, Finance Director

A handwritten signature in black ink, appearing to read "William M. White".

**LEGISLATION:** Resolution 2016-60 authorizing the Township Manager to enter into an agreement with Tyler Technologies for an Enterprise Resource Planning ("ERP") Purchase and Implementation.

**LEGISLATIVE HISTORY:** There are three significant resolutions that have set the table for Resolution 2016-60:

1. Resolution 2013-129 | October 28, 2013: Allocated \$1,000,000 from the Township's \$8.0M Business Tax Settlement to fund the upfront costs associated with the purchase and implementation of an ERP system
2. Resolution 2015-118 | November 23, 2015: Authorized the Administration to negotiate an ERP contract with Tyler Technologies
3. Resolution 2016-42 | March 14, 2016: Authorized the purchase of updated IT network and infrastructure to allow the Township to host the ERP data on-site (versus on the Cloud)

### **PURPOSE AND EXPLANATION:**

[Executive Summary](#) | On October 28, 2013, the Radnor Township Board of Commissioners approved Resolution 2013-129 which allocated funds towards an Enterprise Resource Planning (ERP) Software Program. In August 2014, the Township Finance Department and CARFAC initiated the project to search for an entity-wide software solution to improve operational efficiency, service delivery, transparency, audit comment resolution, interdepartmental cooperation, shared data, online citizen portals, as well as many other benefits. The project includes pursuing an integrated software program that addresses the business process needs of the Finance, Community Development, Public Works, Police, and Recreation Departments. These business processes are currently supported by the Township's use of SunGard PLUS software (last major upgrade took place in 2006), in-house applications developed using Microsoft Access, and numerous ancillary spreadsheets and manual processes. Online credit card payment transactions is provided as a hosted internet service from eGov Strategies LLC (but still require additional, manual entry to get the transaction into the financial system).

[Project Summary](#) | The project kicked off during the summer of 2014 with members of the Township Finance Department presenting the CARFAC IT Subcommittee an overview of departmental level business processes and the inefficiencies in workflow and duplicative efforts caused by the Township's usage of non-integrated pieces of software. Over the next several months, Finance Department staff continued to meet with the CARFAC IT Subcommittee to discuss project objectives and goals, address audit comments and disaster recovery options, and identify potential ERP vendors. The project immediately resolved that the current system setup (or status quo) is *not an option* moving forward.

Between October 2014 and July 2015 software demonstrations were provided by select market leading ERP vendors. SunGard, the Township's current provider, was invited to provide software demonstrations to various Township departments and to perform a gap analysis of the Community Development Department. Two additional ERP vendors were identified as potential ERP providers: New World Systems (Troy, Michigan) with their LOGOS.net software and Tyler Technologies (Yarmouth, ME) with their Munis software. Both vendors were invited to present before the CARFAC IT Subcommittee and demonstrate their software to staff. Feedback from Township staff was



collected and documented after each demonstration.

During the first half of 2015, all three vendors were invited to present an implementation schedule and separate cost proposals for in-house or cloud-based software hosting. Members of the Township Finance Department and the CARFAC IT Subcommittee met to review implementation and cost proposals from all three vendors, narrowing down the potential ERP vendors to SunGard and Tyler Technologies based on staff feedback, costs, and software offerings. New World Systems proposal did not meet essential software requirements; the Real Estate Tax module, Recreation module, and Document Imaging module were not available out-of-the-box and required integration with third-party vendors. The Finance Department also met with various current clients of Tyler Technologies, to gather feedback on their experience with their software and support services. By the end of 2015, CARFAC and the Township Departments have spent hundreds of hours evaluating the various options, demonstrating their functionality, interviewing the implementation teams, reviewing cost proposals and discussing contingencies.

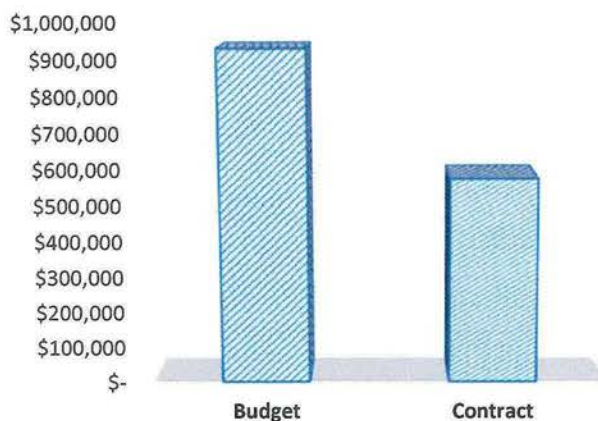
On November 23, 2015, the Radnor Township Board of Commissioners approved Resolution 2015-118 authorizing the Township to negotiate an agreement with Tyler Technologies for an ERP software solution as recommended by CARFAC and the Township Administration as described in this Statement of Work and the associated Agreement.

Since November, CARFAC and the Township Administration have negotiated the purchase and service contract as well as the Statement of Work. Both CARFAC and the Administration support the contract and SOW as presented.

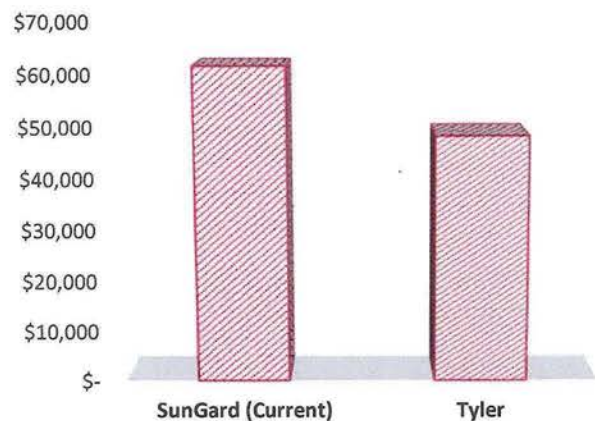
**IMPLEMENTATION SCHEDULE:** Upon adoption, the project is scheduled to kickoff around June 1, 2016 and will take approximately two (2) years to complete.

**FISCAL IMPACT:** As noted by the graphs below, the graphs below show that the Township is selecting the lowest overall cost option that will (1) be less than the amount set aside from the 2013 BPT settlement funds (Graph 1), and (2) the annual maintenance will be less than what the Township is *currently* paying for the outdated SunGard PLUS software resulting in a General Fund savings (Graph 2). Note: These savings are being used to help offset the increased cost of the IT Managed Services agreement approved with the Alura agreement (Res#2016-42).

**GRAPH 1  
ONE TIME COSTS**



**GRAPH 2  
YEAR 2 MAINT. COST**



Note: A portion of the \$1.0M set aside (approx. \$70K) was used for the purchase of Adaptive Reporting and for half of the Alura IT networking/ Infrastructure costs.

**RECOMMENDED ACTION:** The Administration respectfully requests the Board to approve this resolution at the May 9, 2016 meeting. Thank you.



## LICENSE AND SERVICES AGREEMENT

This License and Services Agreement is made between Tyler Technologies, Inc. and Client.

WHEREAS, Client selected Tyler to license the software products and perform the services set forth in the Investment Summary and Tyler desires to perform such actions under the terms of this Agreement;

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 License and 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 Radnor Township, Pennsylvania.
- **“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 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 on which your authorized representative signs 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, 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 software, products, and services attached as Exhibit A.
- **“Invoicing and Payment Policy”** means the invoicing and payment policy. A copy of our current Invoicing and Payment Policy is attached as Exhibit B.
- **“Maintenance and Support Agreement”** means the terms and conditions governing the provision of maintenance and support services to all of our customers. A copy of our current Maintenance and Support Agreement is attached as Exhibit C.
- **“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 Exhibit E.



- “**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 Schedule 1 to Exhibit C.
- “**Third Party End User License Agreement(s)**” means the end user license agreement(s), if any, for the Third Party Software attached as Exhibit D.
- “**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 Software**” means the third party software, if any, identified in the Investment Summary.
- “**Tyler**” means Tyler Technologies, Inc., a Delaware corporation.
- “**Tyler Software**” means our proprietary software and related interfaces identified in the Investment Summary and licensed to you through this Agreement.
- “**we**”, “**us**”, “**our**” and similar terms mean Tyler.
- “**you**” and similar terms mean Client.

## SECTION B – SOFTWARE LICENSE

### 1. License Grant and Restrictions.

- 1.1. We grant to you a license to use the Tyler Software for your internal business purposes only. You may make copies of the Tyler Software for backup and testing purposes, so long as such copies are not used in production and the testing is for internal use only. Your rights to use the Tyler Software are perpetual but may be revoked if you do not comply with the terms of this Agreement.
- 1.2. The Documentation is licensed to you and may be used and copied by your employees for internal, non-commercial reference purposes only.
- 1.3. You may not: (a) transfer or assign the Tyler Software to a third party; (b) reverse engineer, decompile, or disassemble the Tyler Software; (c) rent, lease, lend, or provide commercial hosting services with the Tyler Software; or (d) publish or otherwise disclose the Tyler Software or Documentation to third parties.
- 1.4. The license terms in this Agreement apply to updates and enhancements we may provide to you or make available to you through your Maintenance and Support Agreement.
- 1.5. The right to transfer the Tyler Software to a replacement hardware system is included in your license. You will give us advance written notice of any such transfer and will pay us for any required or requested technical assistance associated with such transfer.
- 1.6. We reserve all rights not expressly granted to you in this Agreement. The Tyler Software and Documentation are protected by copyright and other intellectual property laws and treaties. We own the title, copyright, and other intellectual property rights in the Tyler Software and the Documentation. **The Tyler Software is licensed, not sold.**

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

3. Escrow. We maintain an escrow agreement with a third party under which we place the source code for each major release of the Tyler Software. You may be added as a beneficiary to the escrow agreement by completing a standard beneficiary enrollment form and paying the annual beneficiary fee (currently \$800) directly to the escrow agent. You will be responsible for maintaining your ongoing status as a beneficiary, including payment of the then-current annual beneficiary fees. Release of source code for the Tyler Software is strictly governed by the terms of the escrow agreement.
4. Limited Warranty. We warrant that the Tyler Software will be without Defect(s) as long as you have a Maintenance and Support Agreement in effect. If the Tyler Software does not perform as warranted, we will use all reasonable efforts, consistent with industry standards, to cure the Defect as set forth in the Maintenance and Support Agreement.

### **SECTION C – PROFESSIONAL SERVICES**

1. Services. We will provide you the various implementation-related services itemized in the Investment Summary and described in the Statement of Work. You will receive those 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. You acknowledge that the fees stated in the Investment Summary are good-faith estimates of the amount of time and materials required for your implementation. We will bill you the actual fees incurred based on the in-scope services provided to you. Those amounts are payable in accordance with our Invoicing and Payment Policy. The foregoing notwithstanding, Tyler will not add services to this Agreement unless approved by the Client.
3. Additional Services. 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 project based on our understanding of the specifications you supplied. If additional work is required, or if you use or request additional services, we will provide you with a written addendum or change order, as applicable, outlining the costs for the additional work. Said addendum or change order shall be provided to, and accepted by, Client prior to any work being performed. The price quotes in the addendum or change order will be valid for thirty (30) days.
4. Cancellation. We make all reasonable efforts to schedule our personnel for travel, including arranging travel reservations, at least two (2) weeks in advance of 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. Tyler will waive daily fees associated with the first cancellation and will notify the Client that the next cancellation will result in fees being incurred. The Township will not be responsible for fees related to cancellation if a Township emergency occurs that would reasonably prevent Tyler from conducting onsite sessions as intended by this Agreement.



5. Services Warranty. We will perform the services in a professional, workmanlike manner, consistent with industry standards. In the event we provide services that do not conform to this warranty, we will re-perform such services at no additional cost to you.
6. Site Access and Requirements. 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 implementation services, subject to any reasonable security protocols or other written policies provided to us. You further agree to provide a reasonably suitable environment, location, and space for the installation of the Tyler Software and Third Party Products, including, without limitation, sufficient electrical circuits, cables, and other reasonably necessary items required for the installation and operation of the Tyler Software and Third Party Products.
7. Client Assistance. 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 you have contracted for. 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).
8. Assignment, Removal, Replacement, and Promotion of Tyler Personnel.

8.1. After the Effective Date, and in coordination with the Project kick-off activities identified in the Statements of Work, we will make our Project staffing recommendations. We will provide you with project resumes, demonstrating relevant past project experience, for Project team members that are allocated for potential onsite services on the Project. Those resumes are for your information and planning purposes only.

8.2. You may (a) meet with the proposed Project Manager prior to the project kickoff meeting, with any travel expenses for onsite meetings you request to be billable to you, in order to ensure that the Township is comfortable with the Project Manager both in terms of ability and personality; (b) conduct, at your expense, reference checks on the proposed Key Personnel, as applicable;. In exercising this option, you understand and agree that (a) any meeting, must be requested and conducted within a timeframe, to be mutually agreed upon and that does not impact project initiation. You further understand and agree that staffing assignments, including the assignment of the Project Manager are subject to our reasonable discretion and that our resources are finite, so your approval of the proposed Project Manager will not be unreasonably withheld. Reasonableness, in this context, will be measured by the proposed Project Manager's ability to satisfy the applicable performance standards.

8.3. Once the Tyler Project team is assembled and your counterparts have been identified, both parties agree that they will use commercially reasonable efforts to not remove that staff and personnel from their assigned Project roles without providing at least five (5) days' advance notice, that any such removal shall be for good cause, and that they will work together to mitigate project impacts after any such removal. The parties will also work together to manage the Project impact resulting from the temporary unavailability of Project staff from either party. The Township shall not be responsible for any delays resulting from Tyler's removal of personnel from the Project.



8.4. In the event our personnel is/are not providing services consistent with Tyler's services warranty or as otherwise required by this Agreement, you will notify us of that deficiency and give us a reasonable opportunity to correct it. In the event the deficiency is not timely remedied, we will replace that project member, upon written request. Replacement staff shall have, at minimum, the reasonably equivalent experience as the person being replaced. Replacement personnel shall provide services at no charge to you for such time as is reasonably sufficient, in Tyler's sole discretion, to successfully acquire project knowledge. The foregoing notwithstanding, if the replacement personnel is providing services onsite, you shall remain liable for travel expenses incurred by such personnel, to be invoiced in accordance with the Business Travel Policy.

#### **SECTION D – MAINTENANCE AND SUPPORT**

We will provide you with maintenance and support services for the Tyler Software under the terms of our standard Maintenance and Support Agreement. You agree to pay us the annual maintenance and support fees in accordance with our Invoicing and Payment Policy.

#### **SECTION E – 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. Upon payment in full of the Third Party Software license fees, you will receive a non-transferable license to use the Third Party Software and related documentation for internal business purposes only. Your license rights to the Third Party Software will be governed by the Third Party End User License Agreement(s).
  - 2.1. We will install onsite the Third Party Software. The installation cost is included in the installation fee in the Investment Summary.
  - 2.2. If the Developer charges a fee for future updates, releases, or other enhancements to the Third Party Software, you will be required to pay such additional future fee.
  - 2.3. The right to transfer the Third Party Software to a replacement hardware system is governed by the Developer. You will give us advance written notice of any such transfer and will pay us for any technical assistance required or requested by the Client and actually performed by Tyler, associated with such transfer.
3. Third Party Products Warranties.
  - 3.1. We are authorized by each Developer to grant or transfer the licenses 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. Maintenance. If you have a Maintenance and Support Agreement in effect, you may report defects and other issues related to the Third Party Software directly to us, and we will (a) directly address the defect or issue, to the extent it relates to our interface with the Third Party Software; and/or (b) facilitate resolution with the Developer, unless that Developer requires that you have a separate, direct maintenance agreement in effect with that Developer. In all events, if you do not have a Maintenance and Support Agreement in effect with Tyler, you will be responsible for resolving defects and other issues related to the Third Party Software directly with the Developer.

## **SECTION F – INVOICING AND PAYMENT; INVOICE DISPUTES**

1. Invoicing and Payment. We will invoice you the fees for the license(s), products, and services in the Investment Summary per our Invoicing and Payment Policy, subject to Section F(2).
2. Invoice Disputes. If you believe any delivered product or service does not conform to the warranties or requirements in this Agreement you will provide us with written notice within fifteen (15) days of your receipt of the applicable invoice. The written notice must contain sufficient detail of the issues you contend are in dispute. We will provide a written response to you that will include either a justification of the invoice, an adjustment to the invoice, or a proposal addressing the issues presented in your notice. We will work together 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 only withhold payment of the amount(s) actually in dispute 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 services, including maintenance and support services, if you fail to pay an invoice not disputed as described above.

## **SECTION G – TERMINATION & ADDITION OF SAAS SERVICES**

1. For Cause. You may terminate this Agreement for cause in the event we don't cure, or create a mutually agreeable action plan to address, a material breach of this Agreement within forty-five (45) days of receiving a written notice of the alleged breach. You agree to comply with Section I(3), Dispute Resolution, prior to termination. In the event of termination for cause, 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.

2. Lack of Appropriations. If you should not appropriate or otherwise make available funds sufficient to purchase, lease, operate, or maintain the products or services set forth in this Agreement, you may unilaterally terminate this Agreement upon thirty (30) days written notice to us. In the event of termination due to a lack of appropriations, 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. You will not be entitled to a refund or offset of previously paid license and other fees. You agree not to use termination for lack of appropriations as a substitute for termination for convenience.

3. Force Majeure. Either party has the right to terminate this Agreement if a Force Majeure event



suspends performance of scheduled tasks for a period of forty-five (45) days or more. In the event of termination due to Force Majeure, 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. Client shall be reimbursed for any fees pre-paid to Tyler for services and/or products not delivered.

4. Convenience. You may terminate this Agreement for any reason with forty-five (45) days advance written notice. In the event of termination for convenience, you will pay us for all 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.

5. Migration to SaaS Hosting. Client may add SaaS hosting of the Tyler Software licensed to the Client as of the Effective Date under the following terms:

5.1. Client shall be for all license and services fees (plus expenses) as agreed as of the Effective Date.

5.2. The annual SaaS fee applicable shall be as follows:

5.2.1. Within 1 year of the Effective Date: \$96,564;

5.2.2. Within two (2) years of the Effective Date: \$96,564;

5.2.3. Within three (3) years of the Effective Date: \$99,460.92;

5.2.4. Within four (4) years of the Effective Date: \$102,444.75; and

5.2.5. Within five (5) years of the Effective Date: \$105,518.09.

5.3. Client and Tyler shall execute a mutually agreed addendum including Tyler's then current SaaS services terms and Service Level Agreement.

5.4. Client shall be responsible for other costs associated with Tyler hosting including, without limitation, costs for VPN installation.

## **SECTION H – INDEMNIFICATION, LIMITATION OF LIABILITY AND INSURANCE**

### **1. Intellectual Property Infringement Indemnification.**

1.1. We will defend you against any third party claim(s) that the Tyler Software 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 H(1) will not apply to the extent the claim or adverse final judgment is based on your: (a) use of a previous version of the Tyler Software and the claim would have been avoided had you installed and used a more current version of the Tyler Software of which you had notice regarding its availability and reasonable opportunity to implement; (b) combining the Tyler Software with any product or device not provided, contemplated, or approved by us; (c) altering or modifying the Tyler Software, including any modification by third parties at your direction or otherwise permitted by you; (d) use of the Tyler Software in contradiction of this Agreement, including with non-licensed third parties; or (e) willful infringement, including use of the Tyler Software after we notify you to discontinue use due to such a claim.

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.

1.4. If, as a result of an infringement or misappropriation claim, 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; (c) replace it with a functional equivalent; or (d) terminate your license and refund the license fees paid for the infringing Tyler Software. This section provides your exclusive remedy for third party copyright, patent, or trademark infringement and trade secret misappropriation claims.

2. Property Damage and Personal Injury Indemnification.

2.1. We will indemnify and hold harmless you and your agents, officials, and employees from and against any and all direct claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for personal injury or property damage to the extent caused by our negligence or willful misconduct.

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 direct 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.

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

4. **LIMITATION OF LIABILITY. EXCEPT AS OTHERWISE EXPRESSLY SET FORTH IN THIS AGREEMENT, OUR LIABILITY FOR DAMAGES ARISING OUT OF 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) ONE AND ONE HALF (1.5) THE AMOUNTS LISTED IN THE INVESTMENT SUMMARY AS OF THE EFFECTIVE DATE OF THIS AGREEMENT. THE PRICES SET FORTH IN THIS AGREEMENT ARE SET IN RELIANCE UPON THIS LIMITATION OF LIABILITY. THE FOREGOING LIMITATION OF LIABILITY SHALL NOT APPLY TO CLAIMS THAT ARE SUBJECT TO SECTIONS H(1) AND H(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; and (d) Workers Compensation complying with applicable statutory requirements. We will add you as an additional insured and provide you with copies of certificates of insurance upon written request.

## SECTION I – GENERAL TERMS AND CONDITIONS

1. Additional Products and Services. You may purchase additional products and services at the rates set forth in the Investment Summary for twelve (12) months from the Effective Date, and thereafter 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.
3. Dispute Resolution. 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 meet 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, 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. Taxes. 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 arising from our performance of this Agreement.
5. Nondiscrimination. 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. E-Verify. 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. Subcontractors. We will not subcontract any services under this Agreement without your prior written consent, not to be unreasonably withheld.

8. No Assignment. Neither party may assign this Agreement without the prior written consent of the other party; provided, however, that your consent is not required in the event we have a change of control.
9. Force Majeure. 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 five (5) 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. No Intended Third Party Beneficiaries. 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 End User License Agreement(s).
11. Entire Agreement; Amendment. 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. This Agreement may only be modified by a written amendment signed by an authorized representative of each party.
12. Severability. 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. No Waiver. 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. Independent Contractor. We are an independent contractor for all purposes under this Agreement.
15. Notices. All notices or communications required or permitted as a part of this Agreement 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. Client Lists. You agree that we may identify you by name in client lists, marketing presentations, and promotional materials.
17. Confidentiality. 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:

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;  
a party can establish by reasonable proof was in that party's possession at the time of initial disclosure;  
a party receives from a third party who has a right to disclose it to the receiving party; or  
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. Business License. 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. Governing Law. This Agreement will be governed by and construed in accordance with the laws of your state of domicile.
20. Multiple Originals and Signatures. 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.
21. Contract Documents. This Agreement includes the following exhibits:

- Exhibit A - Investment Summary
- Exhibit B - Invoicing and Payment Policy
  - Schedule 1: Business Travel Policy
- Exhibit C - Maintenance and Support Agreement
  - Schedule 1: Support Call Process
- Exhibit D - Third Party End User License Agreement
- Exhibit E - 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. Radnor Township  
ERP and Schools Division

By: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Address for Notices:

Tyler Technologies, Inc.  
One Tyler Drive  
Yarmouth, ME 04096  
Attention: Associate General Counsel

Address for Notices:

Radnor Township  
301 Iven Ave  
Wayne, Pennsylvania 19087  
Attention: \_\_\_\_\_





## **Exhibit A**

### **Investment Summary**

The following Investment Summary details the software, products, and services to be delivered by Tyler Technologies, Inc. to Radnor Township under your License and Services 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 your License and Services Agreement.

See Tyler Sales Quotation # 2015-12987

**Exhibit B**  
**Invoicing and Payment Policy**

Tyler Technologies, Inc. will provide you with the software, products, and services set forth in the Investment Summary of your License and Services Agreement. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your License and Services Agreement.

**Invoicing:** We will invoice you for the applicable license fees, products, and services in the Investment Summary as set forth below. Your rights to dispute any invoice are set forth in your License and Services Agreement.

1. Tyler Software.

1.1 License Fees: License fees are invoiced as follows:

- a) 25% of the Tyler Software license fees for all phases on the Effective Date;
- b) 50% of the Tyler Software license fees for all phases on the date when we make the applicable Tyler Software available to you for downloading (the "Available Download Date");
- c) 25% (\$23,630) of Phase 1 Tyler Software License fees upon the earlier of: (i) the date, not to exceed July 1, 2017 which provides for Authorization of Live Processing for Phase 1 ("Phase 1 Authorization of Live Processing"), unless such Phase 1 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 1 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 1 Authorization of Live Processing.
- d) 25% (\$5,057.50) of Phase 2 Tyler Software License fees upon the earlier of: (i) the date, not to exceed October 1, 2017 which provides for Authorization of Live Processing for Phase 2 ("Phase 2 Authorization of Live Processing"), unless such Phase 2 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 2 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 2 Authorization of Live Processing.
- e) 25% (\$9,034.25) of Phase 3 Tyler Software License fees upon the earlier of: (i) the date, not to exceed January 1, 2018, which provides for Authorization of Live Processing for Phase 3 ("Phase 3 Authorization of Live Processing"), unless such Phase 3 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 3 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 3 Authorization of Live Processing.
- f) 25% (\$5,142.50) of Phase 4 Tyler Software License fees upon the earlier of: (i) the date, not to exceed June 1, 2018 which provides for Authorization of Live Processing for Phase 4 ("Phase 4 Authorization of Live Processing"), unless such Phase 3 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 4 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 4 Authorization of Live Processing.
- g) 25% (\$7,947.50) of Phase 5 Tyler Software License fees upon the earlier of: (i) the date, not to exceed October 1, 2018 which provides for Authorization of Live Processing for

- Phase 5 ("Phase 5 Authorization of Live Processing"), unless such Phase 5 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 5 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 5 Authorization of Live Processing.
- h) 25% (\$3,516.75) of Phase 6 Tyler Software License fees upon the earlier of: (i) the date, not to exceed January 1, 2019 which provides for Authorization of Live Processing for Phase 6 ("Phase 6 Authorization of Live Processing"), unless such Phase 6 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 6 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 6 Authorization of Live Processing.

1.2 *Maintenance and Support Fees*: The first year maintenance and support fees (\$48,282.00) for the one (1) year period commencing on the Effective Date are waived. Subsequent maintenance and support fees shall be payable as follows:

- a) 100% of the Year Two maintenance and support fees for the Phase 1 and Phase 2 Tyler Software products (totaling \$26,921.00) are due on the first anniversary of the Effective Date.
- b) 60% of the Year Two maintenance and support fees for Phases 3 through 6 (totaling \$12,816.60) are due on the first anniversary of the Effective Date.
- c) 40% of the Year Two maintenance and support fees for Phase 3 Tyler Software Products (\$644.40) are due on upon the earlier of: (i) the date, not to exceed the date listed in the Statement of Work as of the Effective Date which provides for Authorization of Live Processing for Phase 3 ("Phase 3 Authorization of Live Processing"), unless such Phase 3 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 3 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 3 Authorization of Live Processing..
- d) 40% of the Year Two maintenance and support fees for Phase 4 Tyler Software Products (\$2,153.20) are due on the earlier of: (i) the date, not to exceed the date listed in the Statement of Work as of the Effective Date which provides for Authorization of Live Processing for Phase 4 ("Phase 4 Authorization of Live Processing"), unless such Phase 3 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 4 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 4 Authorization of Live Processing..
- e) 40% of the Year Two maintenance and support fees for Phase 5 Tyler Software Products (\$5,030.40) are due on the earlier of: (i) the date, not to exceed the date listed in the Statement of Work as of the Effective Date which provides for Authorization of Live Processing for Phase 5 ("Phase 5 Authorization of Live Processing"), unless such Phase 5 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 5 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 5 Authorization of Live Processing. .
- f) 40% of the Year Two maintenance and support fees for Phase 6 Tyler Software Products (\$716.40) are due on the earlier of: (i) the date, not to exceed the date listed in the Statement of Work as of the Effective Date which provides for Authorization of Live

Processing for Phase 6 ("Phase 6 Authorization of Live Processing"), unless such Phase 6 Authorization of Live Processing is postponed solely due to Tyler's failure to perform, in which event the date for Phase 6 Authorization of Live Processing will be postponed the corresponding number of days; or (ii) actual Phase 6 Authorization of Live Processing. .

Year Three and subsequent annual maintenance and support fees will be invoiced annually in advance on each anniversary of the Effective Date. The foregoing notwithstanding, increases to the annual maintenance and support fees for the Tyler Software Products will accord with the lesser of (i) the actual increase imposed on Tyler clients not receiving the benefit of a maintenance cap; or (ii) the following schedule:

- Year Two – No increase over un-waived Year One annual Maintenance fees;
- Year Three – Three percent (3%) increase over Year Two annual Maintenance fees;
- Year Four – Three percent (3%) increase over Year Three annual Maintenance fees;
- Year Five – Three percent (3%) increase over Year Four annual Maintenance fees.

## 2. Professional Services.

2.1 *Project Planning Services:* Project planning services fee (\$5,000) is invoiced upon delivery of the Implementation Planning Document.

2.2 *Consulting Services:* Consulting services are invoiced 50% upon commencement of the service and 50% upon completion of the service, by product.

2.3 *Data Conversion Services:* Data conversion services are invoiced 50% upon initial delivery of converted data, by conversion option, and 50% upon Client acceptance to load converted data into live environment, by conversion option.

2.4 *Implementation and Other Professional Services (excluding training):* Quote #2015-125987 (Exhibit A) contains not-to-exceed amounts on Implementation and other professional services. The foregoing notwithstanding, Implementation and other professional services (excluding training) are billed at daily rates and invoiced as delivered. **Client will retain ten percent (10%) of the Implementation service day fees associated with a given software module until Live Production of such module, not to exceed the dates set forth in the Statement of Work for Live Production of such module as set forth on the Effective Date.**

2.5 *Training Services:* Training services, included as part of Implementation costs on the Investment Summary, are billed in half-day and full-day increments and invoiced as delivered.

2.6 *Requested Modifications to the Tyler Software:* Requested modifications to Tyler Software are invoiced as follows: (i) 50% upon delivery of specifications and (ii) the remaining 50% thirty (30) days following delivery of the applicable modification. The foregoing

notwithstanding, the Client must report any failure of the modification to conform to the specifications within thirty (30) days of delivery; otherwise, the modification will be deemed to be in compliance with the specifications after the 30-day period has passed.

3. Third Party Products.

4.1 *Third Party Software License Fees:* License fees for Third Party Software are invoiced when Tyler makes the third party software available to the Client for downloading.

4.2 *Third Party Software Maintenance:* The first year maintenance for the Third Party Software is invoiced when Tyler makes the third party software available to the Client for downloading.

4.3 *Third Party Hardware:* Third Party Hardware costs are invoiced upon delivery.

4. Expenses. The service rates in the Investment Summary do not include travel expenses, which are billed in accordance with Tyler's Business Travel Policy attached as Exhibit B, Schedule 1. Copies of receipts will be provided on an exception basis at no charge. You will incur an administrative fee if you request receipts for all non-per diem expenses. Receipts for mileage or miscellaneous items less than twenty-five dollars are not available.

**Payment:** Payment for undisputed invoices is due within forty-five (45) days of the invoice date. Maintenance and support fees are due on each anniversary of the Available Download Date. We prefer to receive payments electronically. Tyler's electronic payment information is:

Bank:	Wells Fargo Bank, N.A. 420 Montgomery San Francisco, CA 94104
ABA:	121000248
Account:	4124302472
Beneficiary:	Tyler Technologies, Inc. – Operating



**Exhibit B**  
**Schedule 1**  
**Business Travel Policy**

1. Air Travel

A. Reservations & Tickets

Tyler's Travel Management Company (TMC) 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 day advance booking requirement is mandatory. When booking less than seven days in advance, management approval will be required.

Except in the case of international travel where a segment of continuous air travel is scheduled to exceed six hours, only economy or coach class seating is reimbursable.

B. Baggage Fees

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

- Up to five days = one checked bag
- Six or more days = two 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 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; 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.

## 4. Meals and Incidental Expenses

Employee meals and incidental expenses while on travel status 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](http://www.gsa.gov/perdiem).

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.





## **Exhibit C**

### **Maintenance and Support Agreement**

Tyler Technologies, Inc. will provide you with the following maintenance and support services for the Tyler Software licensed to you. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your License and Services Agreement.

1. Term. We provide maintenance and support services on an annual basis. The initial term commences on the date when we make the applicable Tyler Software available to you for downloading (the "Available Download Date") and remains in effect for one (1) year. The term will renew automatically for additional one (1) year terms at Tyler's then-current maintenance and support fees, unless terminated in writing by either party at least thirty (30) days prior to the end of the then-current term.
2. Maintenance and Support Fees. The maintenance and support fees for the Tyler Software licensed to you are listed in the Investment Summary of your Agreement. Those amounts are payable in accordance with our Invoicing and Payment Policy. We will provide you with at least forty-five (45) days written notice of any change in your annual maintenance and support fees. We reserve the right to suspend maintenance and support services if you fail to pay undisputed maintenance and support fees within sixty (60) days of the due date. We will reinstate maintenance and support services only if you pay all past due maintenance and support fees, including all fees for the periods during which services were suspended.
3. Maintenance and Support Services. As long as you timely pay your maintenance and support fees, we will, consistent with our then-current Support Call Process:
  - 3.1. perform our maintenance and support obligations in a professional, good, and workmanlike manner, consistent with industry standards, to conform the Tyler Software to the warranty set forth in your Agreement; provided, however, that if you modify the Tyler Software without our consent, our obligation to provide maintenance and support services on and warrant the Tyler Software will be void;
  - 3.2. provide telephone support during our established support hours;
  - 3.3. maintain personnel that are sufficiently trained to be familiar with the Tyler Software and Third Party Software in order to provide maintenance and support services;
  - 3.4. provide you with a copy of 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
  - 3.5. support prior releases of the Tyler Software in accordance with our then-current release life cycle policy.

4. Client Responsibilities. We will use all reasonable efforts to perform any maintenance and support services remotely. 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 can't resolve a support issue remotely, we may be required to provide onsite services. In such event, 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 a VPN for backup connectivity purposes.
5. Excluded Services. Maintenance and support fees do not include fees for the following services: (a) initial installation or implementation of the Tyler Software; (b) onsite maintenance and support (unless Tyler cannot remotely correct a defect in the Tyler Software); (c) application design; (d) other consulting services; (e) maintenance and support of an operating system or hardware; (f) support outside our normal business hours as listed in our then-current Support Call Process; or (g) installation, training services, or third party product costs related to a new release. Requested maintenance and support services beyond those outlined in this section will be billed to you at our then current rates.
6. Current Support Call Process. Our current Support Call Process is attached to this Exhibit C at Schedule 1.



**Exhibit C**  
**Schedule 1**  
**Support Call Process**

**Tyler Technical Support Department for Munis®**

*Goal: To provide an effective support mechanism that will ensure timely resolution to calls, resulting in high-level client satisfaction.*

**Contact Us**

Call Tyler’s toll free number (800-772-2260) or log a support request online through the Tyler Client Portal available at Tyler’s Support Web site ([www.tylertech.com](http://www.tylertech.com)).

**Support Organization**

Tyler’s Technical Support Department for its ERP/Schools Division (also referred to as “Munis”) is divided into multiple teams: Financials; Payroll/HR/Pension; Tax/Other Revenue and Collections; Utility Billing and Collections; OS/DBA (Operating System and Database Administration); and TylerForms and Reporting Services.

These “product-specific” teams allow support staff to focus on a group of products or services. A group of specialists assigned to each team handle calls quickly and accurately.

Each team consists of a Munis Support Product Manager, Support Analysts, and Technical Support Specialists. The Support Product Manager is responsible for the day-to-day operations of the team and ensures we provide exceptional technical support to our clients. The Support Analysts are responsible for assisting the team with clients’ issues, and provide on-going team training. Technical Support Specialists are responsible for diagnosing and resolving client issues in a timely and courteous manner.

**Standard Support Hours**

<b>Applications</b>	<b>Hours</b>
Financials	8:00am-9:00pm EST Monday-Friday
Payroll/HR/Pension	8:00am-9:00pm EST Monday-Friday
Tax/Other Revenue & Collections	8:00am-6:00pm EST Monday-Friday
Utility Billing & Collections	8:00am-8:00pm EST Monday-Friday
OS/DBA	8:00am-9:00pm EST Monday-Friday
TylerForms, Reporting Services and TCM	8:00am-9:00pm EST Monday-Friday





## **Focus on Incoming Rate**

When you call Technical Support, your call is answered by a Support Technician, or is transferred into the Support voice mail. *Our goal is to capture 75 percent of our daily incoming calls*, which means you will often start working with a Support Specialist immediately upon calling Tyler.

## **Leaving Messages for Support**

When leaving a message on the Support voice mail, ensure the following information is contained within the message:

- your full name (first name, last name) and the site you are calling for/from;
- a phone number where you can be reached;
- the details of the issue or question you have (i.e.: program, • process, error message);
- the priority of the issue (1, 2, 3, or 4); and
- when you will be available for a return call (often Support will call back within an hour of receiving your message).

## **Paging**

All client questions are important to us. There may be times when you are experiencing a priority 1 critical issue and all technicians for the requested team are on the line assisting clients. In this circumstance, it is appropriate to press “0” to be redirected to the operator. The operator will page the team you need to contact. We ask that you reserve this function for those times when Munis is down, or a mission critical application is down and you are not able to reach a technician immediately.

## **Online Support**

Some questions can be handled effectively by email. Once registered as a user on Tyler’s Support Web site at [www.tylertech.com](http://www.tylertech.com), you can ask questions or report issues to Support through “Customer Tools”. Tyler’s Client Portal (TCP) allows you to log an incident to Technical Support anytime from any Internet connection. All TCP account, incident, and survey data is available in real-time.

Your existing contact information defaults when you add a new Support incident. You will be asked for required information including Incident Description, Priority, Product Group, and Product Module. Unlimited work-note text is available for you to describe the question or problem in detail, plus you can attach files or screenshots that may be helpful to Support.

When a new incident is added, the incident number is presented on the screen, and you will receive an automated email response that includes the incident number. The new incident is routed to the appropriate Technical Support Team queue for response. They will review your incident, research the item, and respond via email according to the priority of the incident.

## **Customer Relationship Management System**

Every call or email from you is logged into our Customer Relationship Management System and given a unique call number. This system tracks the history of each incident, including the person calling, time of the call, priority of the call, description of the problem, support recommendations, client feedback, and resolution. For registered users on Tyler’s Support Web site ([www.tylertech.com](http://www.tylertech.com)), a list of calls is available real-time under the Tyler Client Portal (TCP).

### Call Numbers

Support's goal is to return clients' calls as soon as possible. Priority 1 calls received before the end of business will be responded to that day. If you are not available when we call back, we will leave a message with the open call number on your voice mail or with a person in your office. When you call back, you can reference this call number so you do not have to re-explain the issue.

An open call number is also given to you once an initial contact has been made with Support and it has been determined that the issue can't be resolved during the initial call. The open call number lets you easily track and reference specific open issues with Support.

### Call Response Goals

Support will use all reasonable efforts to address open calls as follows:

Open Call Priority	Maximum number of days a support call is open	Support managers and analysts review open calls
1	Less than a day	Daily
2	10 Days or less	Every other day
3	30Days or less	Weekly
4	60 Days or less	Weekly

### Call Priorities

A call escalation system is in place where, each day, Support Analysts and Product Support Managers review open calls in their focus area to monitor progress.

Each call logged is given a priority (1, 2, 3, and 4) according to the client's needs/deadlines. The goal of this structure is to clearly understand the importance of the issue and assign the priority for closure. The client is responsible for setting the priority of the call. Tyler Support for Munis tracks responsiveness to priority 1, 2, and 3 calls each week. This measurement allows us to better evaluate overall client satisfaction.

**Priority 1 Call** — issue is critical to the client, the Munis application or process is down.

**Priority 2 Call** — issue is severe, but there is a work around the client can use.

**Priority 3 Call** — issue is a non-severe support call from the client.

**Priority 4 Call** — issue is non-critical for the client and they would like to work with Support as time permits.

### Following Up on Open Calls

Some issues will not be resolved during the initial call with a Support Technician. If the call remains open, the technician will give you an open call number to reference, and will confirm the priority of the incident.

If you want to follow up on an open call, simply call the appropriate Support Team and reference the call number to the Technician who answers or leave this information in your message. Referencing the open call number allows anyone in support to quickly follow up on the issue. You can also update the incident through TCP on Tyler's Web site ([www.tylertech.com](http://www.tylertech.com)) and add a note requesting follow-up.



## Escalating a Support Call

If the situation to be addressed by your open call has changed and you need to have the call priority adjusted, please call the appropriate Support Team and ask to be connected to the assigned technician. If that technician is unavailable, another technician on the team may be able to assist you, or will transfer you to the Product Support Team Manager. If you feel you are not receiving the service you need, please call the appropriate Product Manager and provide them with the open call number for which you need assistance. The Product Manager will follow up on your open issue and determine the necessary action to meet your needs.

## Technical Support Product Managers:

### Financials, Payroll and Human Resources

**Brian Gilman**  
Support Product Manager – Purchasing  
brian.gilman@tylertech.com (X4436)

**Evan Smith**  
Support Product Manager – Budget and General Ledger  
evan.smith@tylertech.com (X4621)

**Holly LaRou**  
Support Product Manager – Equipment  
holly.larou@tylertech.com (X4482)

**Tracy Silva**  
Support Product Manager – Payroll  
tracy.silva@tylertech.com (X4433)

**Ed Haggerty**  
Support Product Manager – Human Resources  
ed.haggerty@tylertech.com (X4464)

**Sonja Johnson**  
Senior Support Product Manager  
sonja.johnson@tylertech.com (X4157)

### Utility Billing and Revenue

**Peggy Wintle**  
Support Product Manager – Utility Billing  
peggy.wintle@tylertech.com (X4567)

**Parker LaChance**  
Support Product Manager – Revenue  
parker.lachance@tylertech.com (X4257)

**Steven Jones**  
Senior Support Product Manager  
steven.jones@tylertech.com (X4255)

### Technology

**Installation  
Dean Wilber**  
Installation Manager  
dean.wilber@tylertech.com (X4730)

**OS/DBA Team  
Ben King**  
Senior Support Product Manager  
ben.king@tylertech.com (X4867)

**TylerForms, Reporting Services & TCM  
Michele Brown**  
Support Product Manager  
michele.brown@tylertech.com (X4381)

### State Reporting

**Patience Stetson**  
Product Supervisor – Payroll State Reporting  
patience.stetson@tylertech.com (X4165)

**Ryan Blair**  
Development Product Manager  
ryan.blair@tylertech.com (X4579)

**CJ McCarron**  
Vice President of Technical Support  
cj.mccarron@tylertech.com (X4124)

*If you are unable to reach the Product Manager, please call CJ McCarron, Vice President of Technical Support at 800-772-2260, ext. 4124 ([cj.mccarron@tylertech.com](mailto:cj.mccarron@tylertech.com)).*

## Resources

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

- **Managed Internet Update (MIU):** Allows you to download and install critical and high priority fixes as soon as they become available.
- **Release Admin Console:** Allows you to monitor and track the availability of all development activity for a particular release directly from Munis.

- **KnowledgeBase:** A fully searchable depository of thousands of documents related to Munis processing, procedures, release info, helpful hints, etc.

### **Remote Support Tool**

Some Support calls may require further analysis of your database or setup to diagnose a problem or to assist you with a question. GoToAssist® shares your desktop via the Internet to provide you with virtual on-site support. The GoToAssist tool from Citrix ([www.citrix.com](http://www.citrix.com)) provides a highly secure connection with 128-bit, end-to-end AES encryption. Support is able to quickly connect to your desktop and view your site's setup, diagnose problems, or assist you with screen navigation.

At the end of each GoToAssist session, there is a quick survey you should complete so we have accurate and up-to-date feedback on your Support experiences. We review the survey data in order to continually improve our Support services.

### **Email Registration**

Clients can go to our Web site and register for email "groups" based on specific Munis applications. We use these groups to inform clients of issues, and to distribute helpful technical tips and updated technical documentation. The survey information allows you to update your registration at any time, and you may unregister for one or more distribution lists at any time.

### **Tyler Web site**

Once you have registered as a user on Tyler's Support Web site ([www.tylertech.com](http://www.tylertech.com)), you have access to "Customer Tools" and other information such as online documentation, user forums, group training schedule/sign-up, and annual user conference updates/registration.

### **Timely TCP Progress Updates**

Our technicians are committed to providing you timely updates on the progress of your open support incidents via the Tyler Client Portal. The frequency of these updates is determined by issue priority.

**Priority 1 Incidents** — Daily updates (only if phone contact is not possible)

**Priority 2 Incidents** — Weekly Updates

**Priority 3 Incidents** — Biweekly Updates

**Priority 4 Incidents** — Biweekly Updates

Updates will also be provided for any issue, regardless of priority, when action items have been completed or when there is pertinent information to share.



**Exhibit D**  
**DocOrigin End User License Agreement**

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**DocOrigin**

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- A. Per-CPU.** The total number of CPUs on a computer used to operate the Software may not exceed the licensed quantity of CPUs. For purposes of this license metric: (a) CPUs may contain more than one processing core, each group of two (2) processing cores is consider one (1) CPU., and any remaining unpaired processing core, will be deemed a CPU. (b) all CPUs on a computer on which the Software is installed shall be deemed to operate the Software unless You configure that computer (using a reliable and verifiable means of hardware or software partitioning) such that the total number of CPUs that actually operate the Software is less than the total number on that computer.
  - B. Per-Document.** This is defined as a fee per document based on the total number of documents generated annually by merging data with a template created by the Software. The combined data and template produce documents of one or more pages. A document may contain 1 or more pages. For instance a batch of invoices for 250 customers may contain 1,000 pages, this will be counted as 250 documents which should correspond to 250 invoices.
  - C. Per-Surface.** This is defined as a fee per surface based on the total number of surfaces generated annually by merging data with a template created by the Software. The combined data and template produce documents of one or more pages, the pages may be printed one side (one surface) or duplexed (2 surfaces). The documents may be rendered to a computer file (i.e. PDF), each page placed in the file is considered a surface. A document may contain 1 or more surfaces. For instance a batch of invoices for 250 customers may contain 500 pages duplexed, this will be counted as 1000 surfaces.
- 1.5 Disaster Recovery License.** You may request a Disaster Recovery license of the Software for each production license You have purchased as a failover in the event of loss of use of the production server(s). This license is for disaster recovery purposes only and under no circumstance may the disaster recovery license be used for production simultaneously with a production license with which it is paired.
- 1.6 Backup Copies.** After installation of the Software pursuant to this EULA, you may store a copy of the installation files for the Software solely for backup or archival purposes. Except as expressly provided in this EULA, you may not otherwise make copies of the Software or the printed materials accompanying the Software.
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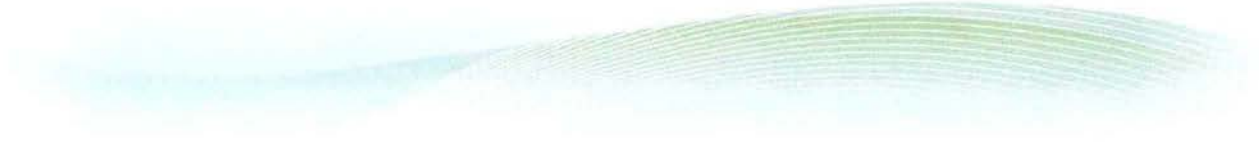
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- 7.2 OF Software Ltd. may terminate this Agreement in the event of any breach by You if such breach has not been cured within five (5) days of notice to You. No termination of this Agreement will entitle You to a refund of any amounts paid by You to OF Software Ltd. or its applicable distributor or reseller or affect any obligations You may have to pay any outstanding amounts owing to OF Software Ltd. or its distributor.
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- 8.2 **Severability.** If any provision of this Agreement is, or becomes, unenforceable, it will be severed from this Agreement and the remainder of this Agreement will remain in full force and effect.
- 8.3 **Assignment.** You may not transfer or assign this Agreement (whether voluntarily, by operation of law, or otherwise) without OF Software Ltd.'s prior written consent. OF Software Ltd. may assign this Agreement at any time without notice. This Agreement is binding upon and will inure to the benefit of both parties, and their respective successors and permitted assigns.
- 8.4 **Governing Law and Venue.** This Agreement shall be governed by the laws of the Province of Ontario. No choice of laws rules of any jurisdiction shall apply to this Agreement. You consent and agree that the courts of the Province of Ontario shall have jurisdiction over any legal action or proceeding brought by You arising out of or relating to this Agreement, and You consent to the jurisdiction of such courts for any such action or proceeding.

**8.5 Entire Agreement.** This Agreement is the entire understanding and agreement between You and OF Software Ltd. with respect to the subject matter hereof, and it supersedes all prior negotiations, commitments and understandings, verbal or written, and purchase order issued by You. This Agreement may be amended or otherwise modified by OF Software Ltd. from time to time and the most recent version of the Agreement will be available on the OF Software website [www.docorigin.com](http://www.docorigin.com).

**Last Updated: [July 18 2013]**



# Tyler Technologies – Radnor Township, PA

Statement of Work- V1.0



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## **Section A: Executive Summary**

### **A.1 Project Overview**

#### **Executive Summary**

On October 28, 2013, the Radnor Township Board of Commissioners approved Resolution 2013-129 which allocated funds towards an Enterprise Resource Planning (ERP) Software Program. In August 2014, the Township Finance Department and CARFAC initiated the project to search for an entity-wide software solution to improve operational efficiency, service delivery, transparency, audit comment resolution, interdepartmental cooperation, shared data, online citizen portals, as well as many other benefits. The project includes pursuing an integrated software program that addresses the business process needs of the Finance, Community Development, Public Works, Police, and Recreation Departments. These business processes are currently supported by the Township's use of SunGard PLUS software (last major upgrade took place in 2006), in-house applications developed using Microsoft Access, and numerous ancillary spreadsheets and manual processes. Online credit card payment transactions is provided as a hosted internet service from eGov Strategies LLC (but still require additional, manual entry to get the transaction into the financial system).

#### **Project Summary**

The project kicked off during the summer of 2014 with members of the Township Finance Department presenting the CARFAC IT Subcommittee an overview of departmental level business processes and the inefficiencies in workflow and duplicative efforts caused by the Township's usage of non-integrated pieces of software. Over the next several months, Finance Department staff continued to meet with the CARFAC IT Subcommittee to discuss project objectives and goals, address audit comments and disaster recovery options, and identify potential ERP vendors. The project immediately resolved that the current system setup (or status quo) is not an option moving forward.

Between October 2014 and July 2015 software demonstrations were provided by select market leading ERP vendors. SunGard, the Township's current provider, was invited to provide software demonstrations to various Township departments and to perform a gap analysis of the Community Development Department. Two additional ERP vendors were identified as potential ERP providers: New World Systems (Troy, Michigan) with their LOGOS.net software and Tyler Technologies (Yarmouth, ME) with their Munis software. Both vendors were invited to present before the CARFAC IT Subcommittee and demonstrate their software to staff. New World Systems performed a business process review (BPR) of all departments, provided a summary to the Township, and based secondary demonstrations on their business process review. Feedback from Township staff was collected and documented after each demonstration.

During the first half of 2015, all three vendors were invited to present an implementation schedule and separate cost proposals for in-house or cloud-based software hosting. Members of the Township Finance Department and the CARFAC IT Subcommittee met to review implementation and cost proposals from all three vendors, narrowing down the potential ERP vendors to SunGard and Tyler Technologies based on staff feedback, costs, and software offerings. New World Systems proposal did not meet essential software requirements; the Real Estate Tax module, Recreation module, and Document Imaging module were not available out-of-the-box and required integration with third-party vendors. The Finance Department also met with various current clients of Tyler Technologies, to gather feedback on their experience with their software and support services. By the end of 2015, CARFAC and the Township



Departments have spent countless hours evaluating the various options, demonstrating their functionality, interviewing the implementation teams, reviewing cost proposals and discussing contingencies.

On November 23, 2015, the Radnor Township Board of Commissioners approved Resolution 2015-118 authorizing the Township to negotiate an agreement with Tyler Technologies for an ERP software solution as recommended by CARFAC and the Township Administration as described in this Statement of Work and the associated Agreement.

## **A.2 Project Criteria for Success**

The overall objective of the project is to capitalize on advances in information technology to increase the efficiency of Township staff, improve access to information, and increase direct access to system functions by employees and constituents. Primary objectives include the implementation of an integrated system to eliminate inefficiencies such as duplicate data management, data entry, transactional processes and reconciliation, provide better and timelier information for decision making, streamline workflow, improve ability to access information for staff and constituents, eliminate the need to manually re-enter data to prepare regular and ad hoc reports, increase direct constituent access to information online and performance of online transactions, and improve security, controls, and disaster recovery.

These objectives include:

- Implement an integrated system to eliminate duplicate data entry and reconciliation, and to provide better and timelier information for decision making.
- Enter information at the source of the transaction (departments, constituents) and streamline workflow.
- Improve ability to access information, including on-line inquiry and download capabilities. Eliminate the need to re-enter data and the manual effort with preparing regular and ad hoc reports.
- Reduce system operational and maintenance costs. Minimize township staff effort to maintain the system.
- Consider outsourcing system management and business process functions, versus running in-house, including hybrid approaches.
- Improve system usability and reduce training requirements.
- Improve security, controls and disaster recovery.
- Maintain access to historical information and minimize system conversion effort.
- Increase direct constituent access to information and transactions, to include access to performing online transactions, requests for action, etc.
- Improve timeliness of information. Eliminate or reduce delays due to batching of transactions.
- Improve ability to drill down through financial reports and to drill down to source documents (many transactions are summarized by the time they get into financial system).
- Improve capability to use information for decision making by staff, township management and commissioners.
- Improve accounting and reconciliation process for credit card receipts.
- Identify capabilities for direct entry of time accounting by employees, including potential use of time clocks.

- Review ability to reduce or eliminate use of separate spreadsheets and word processing documents for budget development.
- Review ability to reduce use of separate spreadsheets and word processing documents for CAFR production.
- Eliminate Microsoft Access databases and applications to improve data management, transactional processes, and gain efficiency by housing information in a single source with the general ledger for timelier and easier reporting.

### **A.3 Project Scope**

The project scope is comprised of the following modules, data conversions, interfaces, reports, workflows, and deliverables defined in this section plus any related professional services described throughout this SOW.

#### **A.3.1 Module Scope**

The scope of modules included in this ERP project includes the following Tyler and Third party software products.

#### **A.3.2 Project Phases**

Implementation for the following functional areas and each of the modules related to the functional areas has been divided into the following major phases.

<b>Phase</b>	<b>Functional Areas</b>	<b>Modules</b>	<b>Start Date</b>	<b>Go-Live Date</b>
1	<b>Core Financials</b>	<ul style="list-style-type: none"> <li>• Accounting General Ledger</li> <li>• Project &amp; Grant Accounting</li> <li>• Cash Management</li> <li>• Budgeting</li> <li>• Requisitions</li> <li>• Purchase Orders</li> <li>• Accounts Payable</li> <li>• Accounts Receivable</li> <li>• General Billing</li> </ul>	June 2016	July 2017 or as defined in the Project Plan
	<b>System Wide</b>	<ul style="list-style-type: none"> <li>• Munis Analytics &amp; Reporting               <ul style="list-style-type: none"> <li>○ Tyler Reporting Services</li> <li>○ Munis Office</li> <li>○ Role Tailored Dashboard</li> </ul> </li> <li>• Tyler Forms Processing</li> <li>• Tyler Content Manager SE</li> </ul>		
2	<b>Core Human Resources / Payroll</b>	<ul style="list-style-type: none"> <li>• Payroll</li> <li>• Employee Self Service</li> <li>• HR Management</li> </ul>	Jan 2017 or as	Oct 2017 or as

			defined in the Project Plan	defined in the Project Plan
3	<b>Tax Billing</b>	<ul style="list-style-type: none"> <li>• Tax Billing</li> <li>• Tax Lien</li> <li>• Tyler Cashiering</li> <li>• CAMA Bridge</li> </ul>	July 2017 or as defined in the Project Plan	April 2018 or as defined in the Project Plan
4	<b>Utility Billing</b>	<ul style="list-style-type: none"> <li>• Utility Billing CIS</li> <li>• UB Interface</li> <li>• Citizen Self-Service</li> </ul>	Sept 2017 or as defined in the Project Plan	July 2018 or as defined in the Project Plan
5	<b>Work Orders/Asset Management/Extended Financials</b>	<ul style="list-style-type: none"> <li>• Work Orders, Fleet &amp; Facilities Management</li> <li>• Fixed Assets</li> <li>• eProcurement</li> <li>• CAFR Statement Builder</li> <li>• Parks and Recreation</li> </ul>	Jul 2017 or as defined in the Project Plan	Jan 2018 or as defined in the Project Plan
6	<b>Permitting/Licensing</b>	<ul style="list-style-type: none"> <li>• Permits &amp; Code Enforcement</li> <li>• Business License</li> <li>• Maplink GIS Integration</li> </ul>	Oct 2017 or as defined in the Project Plan	Jun 2018 or as defined in the Project Plan

#### **A.4 Organizational Scope**

Tyler will implement the functional scope and in-scope software modules for use across the entire Radnor Township including process considerations for all departments.

#### **A.5 Data Conversion Scope**

The following conversion options are a comprehensive list that represents the quoted modules included in the Tyler proposal and considered in scope. Requests to convert data outside of the contracted conversion options or failing to adhere to the noted conversion assumptions in section E.8.7 will be considered out of scope.

<b>Conversion ID</b>	<b>Description</b>
<b>Accounting Opt 1 - Actuals</b>	General ledger – actual account summary balances for up to 3 years, to be populated in the GL Master and GL Master Balance tables



<b>Accounting Opt 2 - Budgets</b>	General Ledger – budgeted account balances for up to 3 years, to be populated in the Munis GL Master and GL Master Balance tables. This can include the original budget, budget adjustments and revised budget
<b>Accounting Standard COA</b>	Chart of Accounts conversion from spreadsheet (to be provided during COA analysis)
<b>Accounts Payable Opt 1 Checks</b>	Check History
<b>Accounts Payable Opt 2 - Invoice</b>	Invoice History
<b>Accounts Payable Standard Master</b>	Vendor Master
<b>Business License- Opt 1 Bills</b>	AR amounts associated with license detail
<b>Business License Std Master</b>	Businesses, licenses, and permits, charges and receipts, and classification codes
<b>Payroll - Option 1 Deductions</b>	Employee Deductions
<b>Payroll - Option 2 Accrual Balances</b>	Employee Accrual Balances
<b>Payroll - Option 3 Accumulators</b>	YTD, QTD, MTD Accumulators
<b>Payroll - Option 4 Check History</b>	Payroll Check History
<b>Payroll - Option 5 Earning/Deduction History</b>	Payroll Earnings and Deductions History
<b>Payroll - Standard</b>	Payroll Employee Master
<b>Permits and Code Enforcement- Opt 1</b>	PI- Opt 1
<b>Permits and Code Enforcement- Opt 2</b>	PI- Opt 2
<b>Permits and Code Enforcement- Opt 3</b>	PI- Opt 3
<b>Permits and Code Enforcement- Standard</b>	PI Master
<b>Purchase Orders - Standard</b>	Open purchase orders with encumbrances
<b>Real Estate- Standard</b>	Tax Master
<b>Utility Billing- Opt 1 Services</b>	UB Services
<b>Tyler Content Manager SE- Permits &amp; Code Enforcement- Opt 1</b>	Applications- 2 Doc Types
<b>Tyler Content Manager SE- Permits &amp; Code Enforcement- Opt 2</b>	Violations- 1 Doc Type
<b>Tyler Content Manager SE- Permits &amp; Code Enforcement- Opt 3</b>	Inspections- 1 Doc Type
<b>Utility Billing- Opt 3 Consumption History</b>	UB Consumption History
<b>Utility Billing- Opt 4 Balance Forward AR</b>	UB Balance Forward AR
<b>Utility Billing- Standard</b>	UB Master

## **A.6 Import and Export Scope**

The standard file layouts and methods will be used for each interface not listed below. For each standard interface, Tyler requires that Radnor Township has an active support agreement with the third party system and for Radnor Township to be on a current version actively supported by the manufacturer/developer of the product installed. Radnor Township understands that not being on the supported version may have an impact on the use. Any requests to modify standard file layouts will follow the Scope/Contract Change Process defined in this Statement of Work.

The following interfaces are in the scope for this project:

- Payroll Positive Pay Export Format

## **A.7 Reports**

The Tyler suite of programs contains hundreds of canned system reports, each utilizing configurable user-supplied parameters to provide hundreds of reporting variations. However, Tyler recognizes that its clients want the flexibility to create even more unique reports and queries to fit their own business needs. Tyler has included Report Writing training as part of our Proposal. Radnor Township will also have available a Report Library of over 200 reports via the Munis Support Website.

Tyler Reporting Services utilizes an SQL report writing tool called Business Intelligence Development Studio (BIDS) to extract data from the Munis system and create custom reports. Once trained, Radnor Township will have the ability to create its own custom reports and modify any report from the TRS Report Library.

## **A.8 Workflows**

All of the available workflow functionality in the licensed modules shall be considered as in scope. Tyler consultants will work with Radnor Township resources to help identify, configure, and train on included workflow processes including preparation of the System Design Document – (DED 5).

## **A.9 Development Services**

No Development Services have been identified at the time of this Statement of Work. If Development Services are necessary, an enhancement request must be submitted to Tyler Development and a quote will be provided.

## **A.10 Project Release Schedule**

Tyler's implementation approach requires that the Township will adhere to the following upgrade schedule. Tyler's Project Manager(s) will coordinate with the Radnor Township's project team to coordinate the upgrade activities as follows:

Version	Test Environment Deployment	Live Environment Deployment	Train Environment Deployment
V11.2	Upon Installation	Upon Installation	Upon Installation

## **A.11 Deliverables**

Tyler will provide the Deliverables identified throughout this statement of work. Deliverables will be submitted as a work product for Radnor Township's review and follow the Deliverable acceptance procedures defined in Section C.11.

Deliverable	Phase	Deliverable Number
Implementation Management Plans	Cross Phase	1-1
Phase 1		
Project Plan	1	1-2
User Manuals	1	1-3

Deliverable	Phase	Deliverable Number
Data Conversion Plan	1	1-4
System Design Document	1	1-5
Static Environment Test (SET) Plan	1	1-6
Modification Specifications	1	1-7 (if applicable)
Pre-Live Checklist	1	1-8
Lessons Learned Document	1	1-9
Phase 2		
Project Plan	2	2-2
User Manual	2	2-3
Data Conversion Plan	2	2-4
System Design Document	2	2-5
SET Test Plan	2	2-6
Modification Specifications	2	2-7 (if applicable)
Pre-Live Checklist	2	2-8
Lessons Learned Document	2	2-9
Phase 3		
Project Plan	3	3-2
User Manual	3	3-3
Data Conversion Plan	3	3-4
System Design Document	3	3-5
SET Test Plan	3	3-6
Modification Specifications	3	3-7 (if applicable)
Pre-Live Checklist	3	3-8
Lessons Learned Document	3	3-9
Phase 4		
Project Plan	4	4-2
User Manual	4	4-3
Data Conversion Plan	4	4-4
System Design Document	4	4-5
SET Test Plan	4	4-6
Modification Specifications	4	4-7 (if applicable)
Pre-Live Checklist	4	4-8
Lessons Learned Document	4	4-9
Phase 5		
Project Plan	5	5-2
User Manual	5	5-3
Data Conversion Plan	5	5-4
System Design Document	5	5-5
SET Test Plan	5	5-6
Modification Specifications	5	5-7 (if applicable)
Pre-Live Checklist	5	5-8
Lessons Learned Document	5	5-9
Phase 6		
Project Plan	6	6-2
User Manual	6	6-3
Data Conversion Plan	6	6-4



Deliverable	Phase	Deliverable Number
System Design Document	6	6-5
SET Test Plan	6	6-6
Modification Specifications	6	6-7 (if applicable)
Pre-Live Checklist	6	6-8
Lessons Learned Document	6	6-9

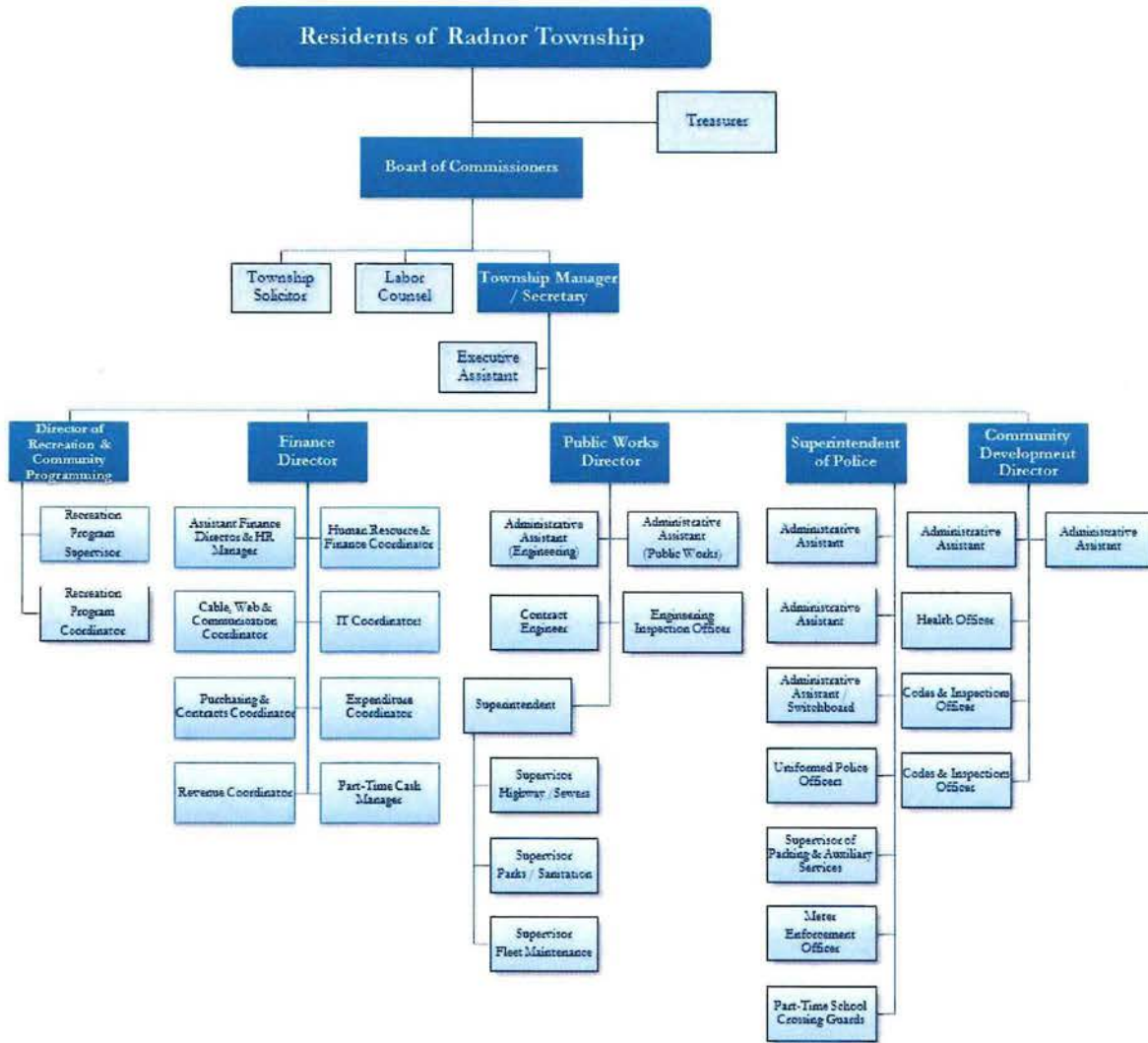
## **A.12 Tyler Forms**

Tyler's Form Library prices are based on delivering the specific form quantities listed below. Additional formats of forms listed below are extra. Custom forms, where custom designs are not required to meet any of Radnor Township's functional requirements, would require a change order. Please note that Tyler Forms requires the use of approved printers only.

- Payroll Library includes: 1 Payroll Check, 1 Direct Deposit, 1 Vendor from Payroll Check, 1 Vendor from Payroll Direct Deposit, W2, W2c, 1099R, ACA 1095B and ACA 1095C.
- Financial Library includes: 1 A/P Check, 1 EFT/ACH, 1 Purchase Order, 1 Contract, 1099M, 1099INT, 1099S and 1099G.
- General Billing Library includes: 1 Invoice, 1 Statement, 1 General Billing Receipt and 1 Miscellaneous Receipt.
- Business License Library includes: 1 Business license and 1 Renewal application.
- Permits Library includes: 1 Building permit, 1 Trades permit, 1 Zoning permit, 1 certification of occupancy completion.
- Utility Billing Library includes: 1 Utility Bill, 1 Assessment, 1 UB receipt, 1 Lien letter, 1 UB delinquent action, 1 door hanger and 1 final utility bill.
- State Tax Library includes: 3 Forms.

## Section B: Project Governance

### B.1 Radnor Township Project Structure



### B.2 Radnor Township Project Roles and Responsibilities

This section presents the anticipated roles and responsibilities for the key staff positions for the project. The joint team of Radnor Township and Tyler will ultimately be responsible for designing, developing and delivering the final products of this project.

### B.3 Radnor Township Decision Making

Decisions will be made in a timely fashion in order to achieve scheduled due dates on tasks and prepare for subsequent training sessions. Decisions left unmade may affect the project schedule as each analysis

and implementation session builds on the decisions made in prior sessions. The following table identifies the type of decisions and project team members with decision authority:

Type of Decision	Radnor Township Decision Making Responsibility
Changes to SOW affecting project budget and/or timing and/or project goals	Executive Steering Committee
Radnor Township Policy Decisions	Executive Steering Committee
Changes to SOW not affecting project budget and/or timing and/or project goals	Radnor Township Project Manager
Acceptance of Milestones / Deliverables	Radnor Township Project Manager
Configuration Decisions	Radnor Township Project Team

#### **B.4 Executive Project Sponsors:**

The Radnor Township Executive Project Sponsors provide support to the project by allocating resources, providing strategic direction, communicating key issues about the project and the project’s overall importance to the organization; and when called upon acting as the final authorities on all project decisions. The project sponsors will be involved in the project as needed to provide necessary support, oversight, guidance, and escalation, but will not participate in day-to-day activities. The project sponsors will empower the steering committee and project team to make critical business decisions for Radnor Township.

Resource	Title
Robert Zienkowski	Township Manager
William White	Director of Finance

#### **B.5 Executive Steering Committee:**

The Executive Steering Committee will understand and support the cultural change necessary for the project and foster throughout the organization an appreciation of the value of an integrated ERP system. The Executive Steering Committee oversees the project team and the project as a whole. Through participation in regular internal meetings the Executive Steering Committee will remain updated on all project progress, project decisions, and achievement of project milestones. The Executive Steering Committee will also provide support to the project team by communicating the importance of the project to each member’s department along with other department managers in Radnor Township. The Executive Steering Committee is responsible for ensuring that the project has appropriate resources, providing strategic direction to the project team, and is responsible for making timely decisions on critical project or policy issues. The Executive Steering Committee also serves as primary level of issue resolution for the project.

Resource	Title
Mark Blair	CARFAC member
Jerry Linden	CARAFAC member
TBD	Radnor Township Commissioner
William White	Director of Finance

#### **B.6 Project Manager:**



Radnor Township’s Project Manager will coordinate project team members, subject matter experts, and the overall implementation schedule and serve as the primary point of contact with Tyler. The Project Manager will be responsible for reporting to the Executive Steering Committee and providing the majority of Radnor Township’s change management communications and coaching.

Resource	Title
Melissa Conn	ERP Project Manager

### **B.7 Project Team:**

The assigned Project Team will have detailed subject matter expertise and be empowered to make appropriate business process and configuration decisions in their respective areas.

The Project Team is tasked with carrying out all project tasks described in the Statement of Work including planning, business process analysis, configuration, documentation, testing, training, and all other required Radnor Township tasks. The Project Team will be responsible for and empowered to implement the new system in the best interests of Radnor Township consistent with the project goals, project vision, and direction from the Project Manager and Executive Steering Committee. Project Team Leads are identified below.

Radnor Township’s project team is responsible for maintaining regular and effective project communications between project stakeholders and supporting overall change efforts in Radnor Township.

Resource	Functional Areas
<b>Robert Tate</b> Assistant Finance Director & HR Manager	<ul style="list-style-type: none"> <li>• Asset Management                             <ul style="list-style-type: none"> <li>○ Fixed Assets</li> </ul> </li> <li>• Extended Financials                             <ul style="list-style-type: none"> <li>○ CAFR Statement Builder</li> </ul> </li> <li>• Permitting/Licensing                             <ul style="list-style-type: none"> <li>○ Business License</li> </ul> </li> </ul>
<b>Amy Lacey</b> Revenue Coordinator	<ul style="list-style-type: none"> <li>• Tax Billing                             <ul style="list-style-type: none"> <li>○ Tax Billing</li> <li>○ Tax Lien</li> <li>○ Tyler Cashiering</li> <li>○ CAMA Bridge</li> </ul> </li> <li>• Utility Billing                             <ul style="list-style-type: none"> <li>○ Utility Billing CIS</li> <li>○ UB Interface</li> <li>○ Citizen Self-Service</li> </ul> </li> <li>• Core Financials                             <ul style="list-style-type: none"> <li>○ Accounts Receivable</li> <li>○ General Billing</li> </ul> </li> </ul>
<b>Ellen McDevitt</b> Cash Manager	<ul style="list-style-type: none"> <li>• Core Financials                             <ul style="list-style-type: none"> <li>○ Accounting General Ledger</li> <li>○ Project &amp; Grant Accounting</li> <li>○ Cash Management</li> </ul> </li> </ul>

<b>Benjamin Cooper</b> Expenditure Coordinator	<ul style="list-style-type: none"> <li>• Core Financials <ul style="list-style-type: none"> <li>○ Accounts Payable</li> <li>○ Requisitions</li> <li>○ Purchase Orders</li> </ul> </li> <li>• Extended Financials <ul style="list-style-type: none"> <li>○ eProcurement</li> </ul> </li> </ul>
<b>Mary Lou Knepschild</b> HR and Finance Coordinator	<ul style="list-style-type: none"> <li>• Core HR/Payroll <ul style="list-style-type: none"> <li>○ Payroll</li> <li>○ Employee Self Service</li> <li>○ HR Mgmt.</li> </ul> </li> </ul>
<b>Melissa Conn</b> Purchasing & Contracts Coordinator	<ul style="list-style-type: none"> <li>• Core Financials <ul style="list-style-type: none"> <li>○ Project &amp; Grant Accounting</li> <li>○ Requisitions</li> <li>○ Purchase Orders</li> </ul> </li> <li>• System Wide</li> </ul>
<b>TBD</b> Community Development Administrative Assistant	<ul style="list-style-type: none"> <li>• Permitting/Licensing</li> </ul>
<b>TBD</b> Engineering Administrative Assistant	<ul style="list-style-type: none"> <li>• Permitting/Licensing</li> </ul>
<b>TBD</b> Public Works Administrative Assistant	<ul style="list-style-type: none"> <li>• Work Orders</li> <li>• Fleet &amp; Facilities</li> <li>• Maplink GIS Integration (Stormwater)</li> </ul>
<b>TBD</b> Recreation	<ul style="list-style-type: none"> <li>• Recreation</li> </ul>

## **B.8 Subject Matter Experts (SMEs)**

Subject Matter Experts (SME's) will play an important role in the project to provide necessary expertise not found on the project team and to support project team activities. However, subject matter experts will have a primary responsibility to their "home" department and not be available for significant periods of time on the project.

SMEs will be Radnor Township's primary interface to all other users of the system throughout Radnor Township (the End Users). Radnor Township's End Users will ultimately be the users of the system in all areas through Radnor Township. SME proactive adoption of the system is vital to Radnor Township realizing success in this project. SMEs will be consulted throughout the process to provide feedback on business processes decisions, configuration decisions, training, documentation, and testing.

<b>Resource</b>	<b>Title</b>
William White	Director of Finance
Kevin Kochanski	Director of Community Development
Steven Norcini	Director of Public Works
Tammy Cohen	Director of Recreation and Community Programming

## **B.9 Technical Team:**

Radnor Township’s Technical Team may be primarily responsible for overall system administration, security, and workflow. The Technical Team will also handle all data conversions, interfaces, and reporting for Radnor Township. It is expected that the Technical team will be responsible for system administration post go-live.

Radnor Township’s technical team will be responsible for all technical aspects of the project.

Resource	Title
Robert Hale	IT Coordinator
Steve Giancristoforo	Part-time IT

### **B.10 Upgrade Coordinator**

The Radnor Township Upgrade Coordinator is the individual that is responsible for the coordination of activities related to upgrading Tyler’s application during the project (if required). Additionally, this role is responsible for managing the upgrade process post go-live.

- Become familiar with the upgrade process and required steps
- Become familiar with Tyler’s Release Life-cycle policy
- Utilize Tyler Community to stay abreast of the latest Tyler Release Life Cycle updates as well as the latest helpful tools to manage your upgrade process
- Assist with the upgrade process, if required, during implementation
- Manage upgrade activities post-implementation
- Manage upgrade plan activities
- Coordinate upgrade plan activities with Tyler and Radnor Township resources
- Communicate changes that will affect users and department stakeholders
- Obtain department stakeholder sign-offs to upgrade Live/Production environment
- Create and publish your site’s multi-year, forward projection upgrade plan

Resource	Title
Melissa Conn	ERP Project Manager

### **B.11 Radnor Township Tyler University Manager**

To assist with the knowledge transfer of Tyler’s products, Tyler provides a Learning Management System, or LMS, known as Tyler University. Tyler University is loaded with course curriculum and corresponding courses for users of all types. Radnor Township’s Tyler University Manager is responsible for the following roles:

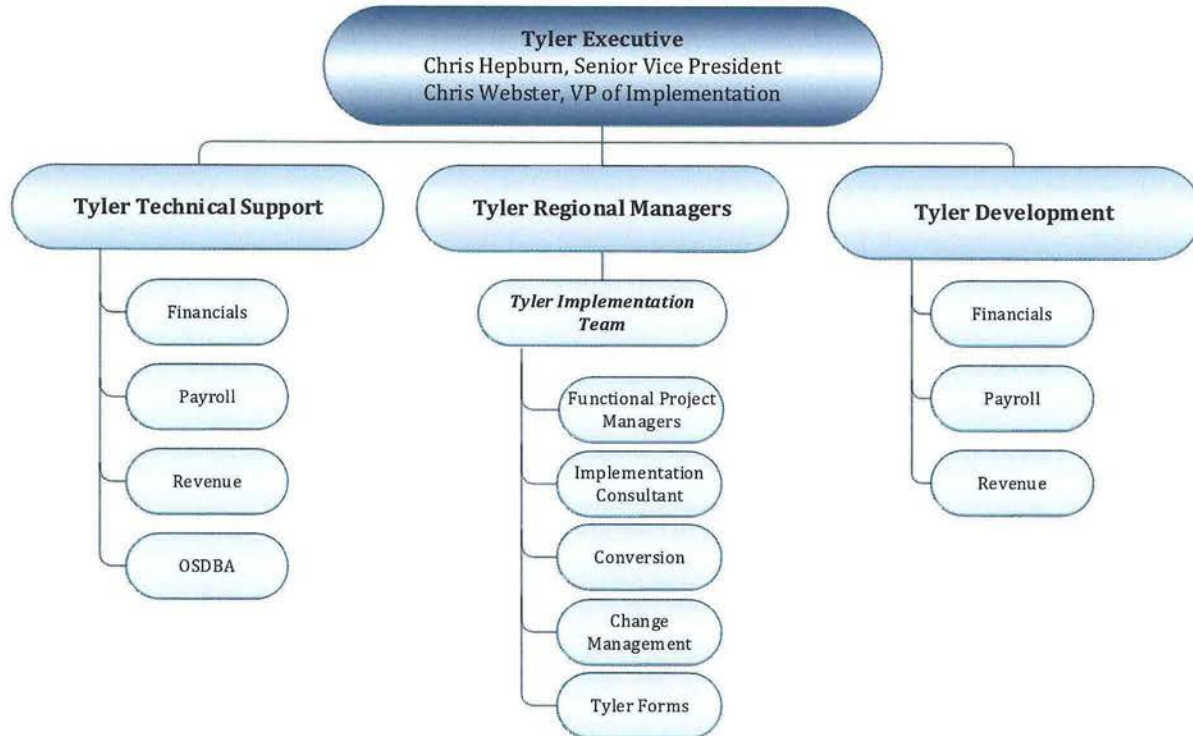
- Work with the Tyler Project Manager(s) to map out standard curricula for users
- Communicate registration and enrollment requirements to Radnor Township users
- Monitor the progress of user’s prerequisite courses
- Act as a Tyler University resource for users
- Work with Tyler Project Manager to import users



Resource	Title
Benjamin Cooper	Expenditure Coordinator

## B.12 Tyler Project Structure

Below is a description of the roles and responsibilities of each member of the Tyler project structure with a level of commitment for both overall work and on-site presence for the Township's project.



## B.13 Tyler Roles and Responsibilities

Tyler plans to leverage the strengths, skills and knowledge of its blended team members. In the tables that follow, a description of the various roles associated with the overall project team is provided Tyler Executive Oversight. The Tyler Vice President of Implementation 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 is able to work with other Tyler department managers in order to escalate and facilitate implementation project tasks and decisions. The Tyler Project Manager or Regional Manager will apprise the Vice President of Implementation of known issues that may require assistance or impede project performance.

Resource	Title	Onsite Commitment	Key Personnel
Chris Webster	Vice President - Implementation	As needed	No

## B.14 Tyler Regional Manager

This team member has indirect involvement with the project and is part of the Tyler escalation process. Tyler Project Managers may consult the Regional Manager with issues and decisions regarding the project. The Tyler Regional Manager is responsible for:

Assignment of consultants and ensuring that availability, or lack of availability for consultants assigned to the Radnor Township’s project does not negatively impact the Radnor Township’s timeline.

- Assisting the Tyler Project Managers with resolution of issues Monitoring progress of the implementation and ensuring the project is on target to meet the desired objectives
- Monitoring overall quality of the project including quality of consulting deliverables
- Providing proactive personal communication with Radnor Township’s Executive Sponsors, Radnor Township’s Steering Committee, and/or Radnor Township’s Project Manager

Resource	Title	Onsite Commitment	Key Personnel
Cheryl Polymeros	Regional Implementation	As needed	No

### **B.15 Tyler Project Manager**

Tyler will assign the role of the Tyler Project Managers and that individual will be responsible for the following.

- Serve as primary point of contact for Radnor Township
- Coordination of all Tyler resources across all modules, phases, and activities including development, conversions, forms, installation, reporting, implementation, and billing.
- Monitor and manage overall project risks
- Communicate regularly with the Radnor Township Project Manager
- Track completion of project tasks
- Escalate outstanding issues for approval within Tyler or coordinate change order process.
- Monitor project quality
- Identify and communicate any Radnor Township risks that may negatively impact the project.

Resource	Title	Onsite Commitment	Key Personnel
TBD	FIN/PR/HR Project Manager	As needed	Yes
TBD	Revenue Project Managers	As needed	Yes

### **B.16 Tyler Implementation Consultants**

Tyler’s Implementation Consultants will bring to the project Tyler Munis knowledge as well as industry knowledge of public sector practices and processes that will enable each consultant to advise Radnor Township on the most appropriate way of configuring Munis and overall achievement of the Radnor Township project scope and goals.

The Tyler Implementation Consultants will be responsible for:

- Reviewing module options and assisting in configuration of module design plans
- Providing conversion consulting and crosswalk assistance
- Participating in to-be Static Environment Testing
- Conducting training (process, conversion validation, parallel processing)
- Testing functionality with Township (base, customizations, interfaces)
- Performing problem solving and troubleshooting



- Following up on issues
- Completing site reports detailing activities for each implementation day
- Keeping Tyler Project Managers apprised of any and all issues that may result in the need for additional training needs, slip in schedule, change in process decisions, or that could adversely impact the success of the project

Resource	Title	Onsite Commitment	Key Personnel
TBD	Implementation Consultants-FIN	75-80% onsite, 20-25% via webinar	Yes
TBD	Implementation Consultants-PR/HR	75-80% onsite, 20-25% via webinar	Yes
TBD	Implementation Consultants-REV	75-80% onsite, 20-25% via webinar	Yes

### **B.17 Tyler Developers**

The Tyler Developers are offsite resources responsible for:

- Performing detailed requirement gathering for contracted modifications (in scope enhancements, custom reports and custom interfaces)
- Reviewing the existing development queue and existing product offerings to determine if the desired functionality can be provided in a less expensive fashion
- Creating and delivering functional specifications for contracted modifications
- Programming and incorporating modifications per the specifications into the base product
- Performing internal quality assurance and developing technical and help documentation
- Providing custom development packages to be loaded into the Tyler system via the Munis Internet Update (MIU) utility
- Performing and providing any necessary modification defect corrections

### **B.18 Tyler Implementation Programmers**

The Tyler Implementation Programmers are offsite resources responsible for:

- Validating customer data files are readable
- Developing customized conversion programs to convert legacy data into the Tyler database for production use according to defined mapping.
- Providing custom conversion packages to be loaded into Tyler's system via the Munis Internet Update (MIU) utility.
- Providing error reports on unsupported data conditions and the merging or normalization of data fields. Assisting Radnor Township with understanding and interpreting those reports.
- Perform modifications and corrections to customized conversion programs as data anomalies and exception conditions are discovered



## **B.19 Tyler Forms Designers**

The Tyler Forms Designers are offsite resources responsible for:

- Providing specifications, or Forms Kits, for all forms in scope
- Reviewing requirements for equipment and supplies
- Developing and provide form mock-up designs
- Conducting review of Radnor Township's form mock-up sheets
- Developing final form designs
- Testing forms and modifying as appropriate based on test results
- Working with Radnor Township team members on the results of functional testing and making changes to address issues from testing
- Configuring and installing forms software and approved forms
- Producing design and troubleshooting documentation for forms

## **B.20 Tyler Support Account Manager**

Tyler Support Account Managers are offsite resources responsible for the following the first year after each phase go-live:

- Providing post-implementation Radnor Township management and planning services
- Planning and preparing for key first year processes such as year-end and W-2 processing
- Assisting Radnor Township plan release upgrades

## **B.21 Tyler Technical Support Specialist**

Tyler Support Specialists are offsite resources responsible for:

- Managing incoming customer issues via phone, email and online customer incident portal
- Documenting and prioritizing issues in Tyler's Customer Relationship Management (CRM) system
- Providing issue analysis and general product guidance
- Tracking issues and tickets to timely and effective resolution
- Identifying options for resolving the reported issue
- Reporting and escalating defects to Tyler Development
- Communicating with customers on the status and resolution of reported issues

## Section C: Project Management

This section outlines key project management tasks that are to occur throughout the project.

### C.1 Project Plan Development and Management

Tyler will create the project plan for phase one within (thirty) 30 calendar days from the first project planning call, which is to occur after the contract signing and will help Tyler get the information necessary to complete the project plan. Upon completion and acceptance of the phase 1 project plan (DED 2), Tyler will begin work on the project plan for Phase 2. Project plans for phase 2 shall be completed at least ninety (90) calendar days prior to the start of any Phase 2 activities. Once the project plan is approved by Radnor Township, All other phases will be developed closer to the start of their respective phases. Tyler's Project Managers will edit and update as necessary as part of regularly scheduled project management meetings with Radnor Township's Project Manager.

All project tasks will be assigned owners and due dates which correspond with the overall project schedule. Project Tasks that are not completed by the due date may adversely affect the project schedule and live dates.

	Radnor Township Role	Tyler Role
Steering Committee/Regional Manager	<ul style="list-style-type: none"> <li>Review project plan</li> </ul>	<ul style="list-style-type: none"> <li>Review project plan for compliance with SOW</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>Work with Tyler project manager to develop project plan</li> </ul>	<ul style="list-style-type: none"> <li>Take lead in developing project plan</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>Review project plan</li> </ul>	<ul style="list-style-type: none"> <li>Review and become familiar with full project plan</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>Identify applicable meetings/deadlines on project plan and plan accordingly</li> </ul>	<ul style="list-style-type: none"> <li>Identify applicable meetings/deadlines on project plan and plan accordingly</li> </ul>

#### C.1.1 Requirements/Notes

The Project Work Plan will contain:

- Project's activities and tasks
- Dates of project activities and tasks
- Specific resources assigned to project tasks
- Detailed Project schedule/Work Breakdown Structure (WBS) featuring phases, deliverables, and work packages
- Milestones and Deliverables
- Radnor Township Review Periods for Milestones and Deliverables
- Project Acceptance of Implementation Control Points
- Decisions will be made in a timely fashion in order to achieve scheduled due dates on tasks and prepare for subsequent training sessions. Decisions left unmade may affect the project

schedule as each analysis and implementation session builds on the decisions made in prior sessions

- The project plan will be consistent with the SOW
- All homework and other activities required of either the Radnor Township Project Team or Tyler consultants will be included on the project plan.

## **C.2 Project Status Reports**

Tyler will prepare project status reports every month throughout the project. Project reports are intended for the Radnor Township Executive Sponsor, Radnor Township Steering Committee, Tyler Executive Oversight, and Tyler Regional Manager and provide the following key elements:

- Project Status
- Summary of accomplishments
- Status of key milestones and deliverables
- Upcoming tasks and schedule
- Assist with Identification Issues/Risks (including issues/risk that may impact project goals)
- Planned risk mitigation strategy
- Summary of change requests.

Tyler Project Managers will also review project progress and status with the project leads and team members for both Tyler and Radnor Township on a bi-weekly basis, or more often if deemed necessary by either the Tyler Project Managers or Radnor Township Project Manager.

	Radnor Township Role	Tyler Role
Steering Committee/Regional Manager	<ul style="list-style-type: none"> <li>• Review status reports</li> </ul>	<ul style="list-style-type: none"> <li>• Review status reports</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>• Provide any necessary updates for status reports</li> <li>• Participate in bi-weekly status meetings</li> <li>• Review status reports</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare status reports</li> <li>• Post status report to project SharePoint</li> <li>• Facilitate bi-weekly status meeting</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Review status reports</li> <li>• Participate in bi-weekly status meeting if necessary</li> </ul>	<ul style="list-style-type: none"> <li>• Participate in bi-weekly status meeting if necessary</li> </ul>
Subject Matter Expert / Other		

### **C.2.1 Requirements/Notes**

- The format for the status reports will be mutually agreed as part of the project planning phase of the project.
- Radnor Township will cooperate and provide information for inclusion on the status report.
- The Status report will be delivered at least two (2) business days prior to any scheduled Executive Sponsor, Steering Committee, or Project Manager meeting at which the status report is being discussed.



### C.3 SharePoint

Tyler will provide a SharePoint site that will serve as the primary collaboration tool for use on the project. The SharePoint site will contain the project plan, all Tyler project documents, any Radnor Township project documents, any deliverables, sign offs, change orders or other documents that will be shared with the project team.

	Radnor Township Role	Tyler Role
Steering Committee	<ul style="list-style-type: none"> <li>Review SharePoint site as necessary</li> </ul>	<ul style="list-style-type: none"> <li>Review SharePoint site as necessary</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>Manage Radnor Township information on SharePoint Site</li> </ul>	<ul style="list-style-type: none"> <li>Manage overall SharePoint site include set up of SharePoint folders</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>Utilize SharePoint site for project documents (both posting and downloading)</li> </ul>	<ul style="list-style-type: none"> <li>Utilize SharePoint site for project documents (both posting and downloading)</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>Review SharePoint as necessary</li> </ul>	<ul style="list-style-type: none"> <li>Post trip reports and other documents as necessary.</li> </ul>

#### C.3.1 Requirements/Notes

- As part of the Project Kick Off, The Tyler Project Managers will provide an overview of the SharePoint Site, its organization, included documents and policies for use.
- The Radnor Township and Tyler will mutually agree upon SharePoint use for the project.
- Tyler performs a daily routine backup for all Radnor Township SharePoint sites using industry standard backup techniques and processes. Site-specific backup files can be provided as a billable service with a minimum of 4 hours charged for each backup file using the contracted Tyler rate for implementation services. Tyler does not provide SharePoint consulting services to restore provided backup files in Radnor Township-hosted environment.

### C.4 Agendas

Tyler’s Project Managers will provide agendas at least 2 weeks prior to any on-site meeting. Agendas will include:

- Session Title
- Required Attendees
- Prerequisites (eLearning and documents)
- Session Topics
- Requirements (classroom)
- Known homework tasks to be assigned

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>Review Agenda</li> <li>Distribute to Meeting Participants</li> </ul>	<ul style="list-style-type: none"> <li>Develop agendas</li> <li>Post agendas to SharePoint</li> </ul>
Project Team / Implementation	<ul style="list-style-type: none"> <li>Review Agendas prior to</li> </ul>	<ul style="list-style-type: none"> <li>Review agendas prior to</li> </ul>

Consultant	meeting	meeting
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>Review agendas prior to meeting</li> </ul>	<ul style="list-style-type: none"> <li>Review agendas prior to meeting</li> </ul>

**C.4.1 Requirements/Notes**

- Upon submission of the agenda, Radnor Township shall review and provide comments or questions on the agenda within five (5) business days. Tyler shall make any required revisions promptly to allow for appropriate meeting preparation.
- All meeting participants will review meeting agendas prior to the meeting.

**C.5 Executive Steering Committee Meetings**

The Project Communications Plan developed at the beginning of the project (as part of the implementation management plan) will identify a meeting schedule for the Radnor Township Executive Steering Committee. It is expected that the Executive Steering Committee will meet biweekly and Radnor Township Project Manager, will prepare the Executive Steering Committee Agenda prior to all scheduled Executive Steering Committee meetings. The Executive Steering Committee agenda will include any issues that require approval at the next meeting. If necessary, Tyler’s Project Managers, or Regional Manager may participate in the Executive Steering Committee meeting either in person or by phone.

	Radnor Township Role	Tyler Role
Steering Committee / Tyler Regional Manager or Tyler Executive Oversight	<ul style="list-style-type: none"> <li>Participate in meetings at least once per every 2 weeks</li> </ul>	<ul style="list-style-type: none"> <li>Participate in Steering Committees as necessary</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>Develop agenda for steering committee meeting</li> </ul>	<ul style="list-style-type: none"> <li>Participate in Steering Committees as necessary</li> </ul>
Project Team / Implementation Consultant		
Subject Matter Expert / Other		

**C.5.1 Requirements/Notes**

In the event that there are project issues that require Tyler’s on-site participation, Radnor Township will not be required to reimburse the costs of travel for Tyler’s Project Managers, Regional Project Manager, or Tyler Executive Sponsor’s on-site participation. Radnor Township may cancel Executive Steering Committee Meetings if there are not a sufficient number of items to discuss or if items can be deferred until the following meeting.

**C.6 Site Reports**

Each Tyler resource that is on-site for project activities with Radnor Township will provide a site-report and post to the Tyler SharePoint site. All site reports will contain meeting notes, issues, and documentation of any decisions during the visit. Site reports will be completed within one week for each visit. Tyler will be responsible for taking any issues or risks identified in the site reports and adding it to the Issues Log.

	Radnor Township Role	Tyler Role
Steering Committee		



	Radnor Township Role	Tyler Role
	<ul style="list-style-type: none"> <li>Monitor and communicate user progress to Township management staff</li> </ul>	
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>Complete Tyler University prerequisites prior to attending related knowledge transfer or training courses</li> </ul>	<ul style="list-style-type: none"> <li>Communicate and identify prerequisite content on agendas and site reports.</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>Complete Tyler University prerequisites prior to attending related knowledge transfer or training courses</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>

### **C.12.2 Knowledge Base**

Tyler provides a knowledge base website that allows users to search and receive training materials such as videos, step by step documentation, how to documentation, etc. Documentation and Release Notes are included with every new release and are distributed with each new release. Additionally, release notes and documentation are updated within the support knowledgebase. Knowledge base will be available to Radnor Township staff at the time of contract signing.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		<ul style="list-style-type: none"> <li>Provide reference to knowledge base documents</li> </ul>
Project Team / Implementation Consultant		<ul style="list-style-type: none"> <li>Provide reference to knowledge base documents</li> </ul>
Subject Matter Expert / Other		

### **C.12.3 Requirements/Notes**

- Tyler will ensure that all referenced knowledge base documents are current and applicable for Radnor Township’s project.
- References to documents on the knowledge base will be specific and direct Radnor Township to specific documents.
- Tyler will provide guidance and demonstrate to Radnor Township project team members how to use the knowledge base to find necessary information.



Project Manager	• Review site reports	• Review site reports
Project Team / Implementation Consultant	• Review site reports	• Complete site reports
Subject Matter Expert / Other		• Complete site reports

**C.6.1 Requirements/Notes**

- Any issues identified on the site report will also be identified on the Project Issues Log
- All site reports will be completed no later than one week after completion of a site visit.
- All site reports will be reviewed and edited for quality by the Tyler Project Managers prior to posting to SharePoint for Radnor Township review.
- The Tyler Project Managers will be responsible for ensuring that site reports are complete and accurate.
- Completion of site reports will be part of acceptance criteria for each phase.

**C.7 Issues Log and Issue Tracking**

Tyler will maintain a list of issues (both open and closed) that have been identified for the project on the SharePoint site. Any project risks, key decisions, issues, disputes, or late tasks shall be identified on the Issues Log.

Upon identification of project issues, risks, and key project decisions both Tyler and Radnor Township team members are responsible for adding the issue to the Issues Log. For each identified issue, the following information will be captured:

- Issue Number
- Reported by/date
- Status (i.e. new, open, closed, pending)
- Module/Business Process
- Priority
- Issue
- Comments
- Findings
- Recommendations
- Resolution Assignment
- Date Tested
- Testing comments/issues
- Date Closed

Radnor Township and Tyler Project Managers will review the Issues Log during project status meetings, or in individual meetings as needed. Radnor Township and Tyler Project Managers will collaboratively assign a priority to each issue and identify the individual(s) responsible for facilitating its resolution. During the critical phases of the project, Radnor Township and Tyler Project Managers will review the issues log on a daily basis.

Issues identified through the Issues Log will be resolved by the implementation team or the Tyler implementation team will coordinate as necessary with Tyler’s internal resources.

Radnor Township Role	Tyler Role
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Steering Committee / Tyler Regional Manager	<ul style="list-style-type: none"> <li>• Serve as point of escalation of issues</li> </ul>	<ul style="list-style-type: none"> <li>• Serve as point of escalation of issues</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>• Document and review issues</li> </ul>	<ul style="list-style-type: none"> <li>• Document and review issues</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Document issues</li> </ul>	<ul style="list-style-type: none"> <li>• Document issues</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Report issues to Project Manager or Project Team Lead</li> </ul>	<ul style="list-style-type: none"> <li>• Report issues to Project Manager</li> </ul>

**C.7.1 Requirements/Notes**

- At any time during the project, if Radnor Township is not satisfied with the level of response from the Tyler Project Managers or Tyler Regional Manager, or if the Tyler Project Manager or Tyler Regional Manager do not have the ability to make key decisions or resolve potential issues, Radnor Township will reserve the right to escalate the issue to the Tyler Executive Oversight Team. Tyler’s Executive Oversight Team will have responsibility for overall project delivery.

**C.8 Risk Management**

Radnor Township and Tyler will jointly work to identify and communicate risks and identify strategies for mitigating the impacts of project risks.

	Radnor Township Role	Tyler Role
Steering Committee	<ul style="list-style-type: none"> <li>• Address any issues escalated to the Steering Committee level</li> </ul>	<ul style="list-style-type: none"> <li>• Address any issues escalated to the Steering Committee level</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>• Monitor risks and communicate any identified risks to the Tyler Project Managers and Steering Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor risks and work with Radnor Township Project Manager to develop risk mitigation plans</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Communicate any risks to the Radnor Township Project Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate any risks to the Tyler Project Managers</li> </ul>
Subject Matter Expert / Other		

**C.8.1 Requirements/Notes**

- Risks will be monitored, recorded, and assessed using an agreed upon methodology in the Tyler Risk Plan. All risks will be actively monitored by both Tyler and Radnor Township
- Tyler will have responsibility for maintaining the project risk plan.

**C.9 Scope/Contract Change Process**

Tyler acknowledges that any scope change proposal that affects the total cost of the project is subject to the Radnor Township’s policies and must provide adequate time for consideration. Radnor Township acknowledges that such scope change proposals may affect the implementation costs, schedule and go-live dates, which will be changed by mutual agreement. All scope change proposals shall be governed by



the terms and conditions of the Master Agreement, including adjusting or adding milestone payments where applicable.

### **C.9.1 Implementation Services Change Process**

If Radnor Township requires the performance of services, including any implementation, consulting, training, or conversion services that are not then being performed, or requires a change to the existing services, Radnor Township's Project Manager shall deliver to the Tyler's Project Managers an implementation services scope change request specifying the proposed work with sufficient detail to enable Tyler to evaluate it. Tyler, within ten (10) business days, or longer as may be mutually agreed between the parties, following the date of receipt of such change request, shall provide Radnor Township with a written scope change proposal containing the following:

- Detailed description of resources (both Tyler and Radnor Township) required to perform the change
- Implementation Plans
- Schedule for completion
- Acceptance criteria
- Impact on current milestones and payment schedule
- Impact on project goals and objectives
- Price

### **C.9.2 Product Enhancement/Change Process**

If the Radnor Township requires the modification of the products in scope, including any interface not in scope, the Radnor Township's Project Manager shall submit the request via the Enhancement Request Process documented on Tyler Community specifying the proposed enhancement with sufficient detail to enable Tyler to evaluate it.

Tyler has two different types of Product Enhancement Requests:

1. Product Suggestions - Suggestions will not be assigned submission numbers, will not be officially tracked and will not receive a response. Throughout the development planning cycle, Tyler's Strategic Review Committees will analyze thousands of suggestions. Tyler will work to identify patterns within the suggestions, which will help us best determine the areas of the product needing to be addressed.
2. Request for Development Quote - Requests are submitted via the Request for Development Quote website, assigned a submission number for tracking purposes and reviewed by our Development Teams. Tyler, within thirty (30) business days, or longer as may be mutually agreed between the parties, following the date of receipt of such change request. If the request is not generally consistent with the current direction of the respective product Tyler will notify Radnor Township in writing; otherwise Tyler shall provide Radnor Township with a written development scope change proposal containing the following:
  - Specification
  - Schedule for completion
  - Minimum version requirements



- Any additional implementation services required, such as project management, conversions, forms output and/or training outside of the current project scope
- Impact on current milestones and payment schedule
- Impact on project goals and objectives
- Response Due Date
- Total cost

All Request for Development requests will be coordinated and/or approved first by Radnor Township Project Manager or other designee and Tyler Project Manager. Development requests will also be identified on the issues log and elevated to Radnor Township Executive Team for review at the next Executive Team meeting.

By the Response Due Date Radnor Township shall notify Tyler in writing if Radnor Township elects to proceed with the Development request. Tyler’s Project Manager will submit the approved Development request to Tyler’s Contract team to create a contract amendment. Tyler will schedule the work described in the Development change request upon Tyler’s receipt of a signed contract amendment. If, by the Response Due, Radnor Township gives notice to Tyler not to proceed, or fails to give any notice to Tyler, then the scope change proposal shall be deemed withdrawn and Tyler shall take no further action with respect to it.

	Radnor Township Role	Tyler Role
Steering Committee	<ul style="list-style-type: none"> <li>• Review and approve change proposals</li> </ul>	
Project Manager	<ul style="list-style-type: none"> <li>• Communicate requested changes to Tyler</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinate change process</li> <li>• Communicate requested changes to Radnor Township</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Communicate issues, risks, and other potential change items to Radnor Township Project Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate issues, risks, and other potential change items to Tyler Project Manager</li> </ul>
Subject Matter Expert / Other		

**C.9.3 Requirements/Notes**

- Radnor Township acknowledges that such scope change proposals may affect the implementation schedule and Go-Live Dates, which will be changed by mutual agreement.
- Within the timeframe specified in Tyler’s scope change proposal, which timeframe shall not be less than ten (10) business days from Radnor Township Project Managers’ receipt of such scope change proposal, Radnor Township shall notify Tyler in writing if Radnor Township elects to proceed with the change proposal.
- All scope change requests and scope change proposals will be approved first by Radnor Township Project Managers and Tyler Project Managers. Scope change requests that impact the project timeline and/or the project milestones, including pricing milestones will also elevated to Radnor Township Executive Steering Committee for review

**C.10 Deliverable / Milestone Acceptance:**

When complete, all deliverables and payment milestones require acceptance from the Radnor Township Project Manager. Upon completion, the Tyler Project Manager shall notify the Radnor Township Project Manager and provide any necessary documents for review.

	Radnor Township Role	Tyler Role
Steering Committee	<ul style="list-style-type: none"> <li>Review any issues escalated from the Radnor Township or Tyler Project Manager</li> </ul>	<ul style="list-style-type: none"> <li>Review any issues escalated from the Radnor Township or Tyler Project Manager</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>Review and accept/reject</li> <li>Provide feedback on rejections</li> </ul>	<ul style="list-style-type: none"> <li>Coordinate acceptance process</li> </ul>
Project Team / Implementation Consultant		
Subject Matter Expert / Other		

**C.10.1 Requirements/Notes**

- All review periods will be tracked on the project plan
- The Radnor Township Project Manager will have decision authority to approve/reject all project milestones
- The deliverable review and acceptance period is defined in section C.11 of the SOW. For the project plan (DED 2), the System Design Document (DED 5) and the Static Environment Test Plan (DED 6) shall be ten (10) days.

## **C.11 Control Point Acceptance**

At each control point identified in the Radnor Township project manager, and Tyler Project Manager shall review project progress, project outcomes, deliverables, and current status. Any open issues shall be resolved or decisions made on appropriate plans within five (5) business days after the Control Point Acceptance review, or as mutually agreed upon between the parties, for resolution prior to advancing on in the project. Both Tyler and Radnor Township recognize that failure to complete tasks and resolve open issues may have a negative impact on the project.

Both Tyler and Radnor Township are required to sign off on the control point acceptance.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>Review control point and upon completion grant sign off</li> </ul>	<ul style="list-style-type: none"> <li>Review control point and upon completion grant sign off</li> </ul>
Project Team / Implementation Consultant		
Subject Matter Expert / Other		

### **C.11.1 Requirements/Notes**

- All control point reviews will be identified on the project plan.
- Any open issues shall be resolved or decisions made on appropriate plans within five (5) business days after the Control Point Acceptance review, or as mutually agreed upon between the parties, for resolution prior to advancing on in the project.
- Both Tyler and Radnor Township recognize that failure to complete tasks and resolve open issues may have a negative impact on the project.
- For any tasks not yet complete, Tyler and Radnor Township will provide sufficient resources to expedite completion of tasks as to not negatively impact the project.

### **C.11.2 Deliverable Acceptance**

Deliverable Acceptance will be initiated and managed by utilizing the SharePoint workflow approval process and other process defined by Tyler Project Managers.

## **C.12 Other Project Management Resources**

### **C.12.1 Tyler University**

To assist with the knowledge transfer of Tyler's products, Tyler provides a Learning Management System, or LMS, known as Tyler University. Tyler University is loaded with course curriculum and corresponding courses for users of all types. Courses provide step-by-step, interactive eLearning recordings that allows users to enroll and participate in session content on their schedule. Tyler University will be available to Radnor Township staff upon installation of Tyler's ERP system.

	Radnor Township Role	Tyler Role
Project Manager / Tyler University Manager	<ul style="list-style-type: none"> <li>Assist with creation of Tyler University user accounts</li> <li>Ensure users are following curriculums</li> </ul>	<ul style="list-style-type: none"> <li>Assist with creation of Tyler University user accounts</li> <li>Provide user progress reports</li> </ul>



## Section D: Technology Architecture

### D.1 Environments

As part of the project, Tyler will establish the following environments in our SaaS center. During the implementation project, environments will be established separately for each phase as needed

- Testing
- Training
- Production/Live

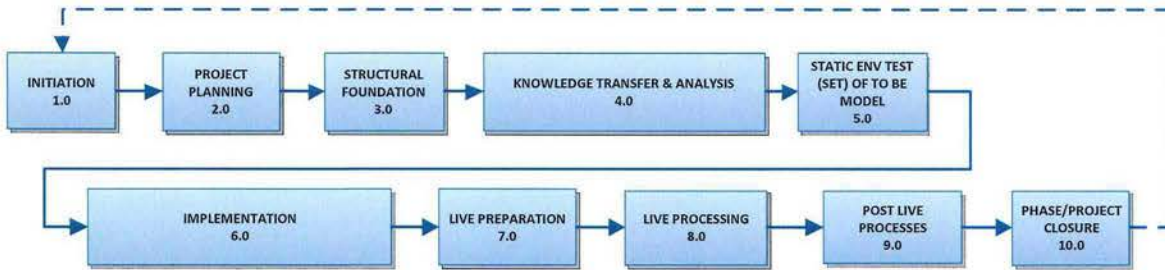
### D.2 SaaS Solution

Please refer to the SaaS agreement in regards to access, connectivity and service level details.

## Section E: Implementation

### E.1 Implementation Methodology Overview

Each phase of the project will be implemented using the methodology defined below. Throughout the project methodology, Tyler has established control points (critical review points) to ensure an organization fully understands and accepts the project and to ensure that Tyler is providing quality services to assist in Radnor Township's implementation. It is at these check points that organizational stakeholders monitoring the overall project (for both Tyler and Radnor Township) must formally accept the project to date. Once there is formal acceptance, the project will proceed to the next phase. Control points are defined in the section below and the process for accepting each is identified in Section C.11.



IMPLEMENTATION METHODOLOGY  
PROCESS REPEATED FOR EACH PHASE

### E.2 Control Points

To ensure quality and adherence to the methodology identified in this SOW, Tyler and Radnor Township have identified the following control points that must be formally accepted prior to moving on in the project. Control points are as follows:

Phase	Control Point	Description
1	1.1	Radnor Township Acceptance of Phase Schedule <ul style="list-style-type: none"> <li>• Kick-off complete</li> <li>• Implementation Management plans accepted (DED 1-1)</li> <li>• Project Plan accepted and posted to project SharePoint site (DED 1-2)</li> <li>• User Manuals Provided (DED 1-3)</li> </ul>
1	1.2	Chart of Accounts Design Acceptance <ul style="list-style-type: none"> <li>• Chart of Accounts analysis complete</li> <li>• Chart of Accounts Workbook delivered</li> <li>• Chart of Accounts conversion loaded into Test/Train</li> </ul>
1	1.3	Authorization to Proceed to SET <ul style="list-style-type: none"> <li>• As-is/to-be analysis complete</li> <li>• Data Conversion Plan accepted (DED 1-4)</li> <li>• System design Document completed with initial to-be decisions (DED 1-5)</li> <li>• Static Environment Test plan accepted (DED 1-6)</li> </ul>
1	1.4	Authorization to Proceed to Implementation <ul style="list-style-type: none"> <li>• Static Environment Test complete</li> <li>• System Design Document updated with to-be decisions (DED 1-5)</li> <li>• Acceptance to load final Chart of Accounts into Live/Production</li> </ul>
1	1.5	Authorization to Proceed to Live Preparation <ul style="list-style-type: none"> <li>• Training complete for all applicable processes</li> <li>• Go-live planning complete</li> <li>• Authorization to load Tyler Forms Libraries</li> <li>• Pre-live check list accepted (DED 1-8)</li> </ul>
1	1.6	Sign-off to begin Live Processing <ul style="list-style-type: none"> <li>• Go-live checklist complete</li> <li>• Authorization to load required data conversions into Live/Production</li> <li>• Authorization to begin live processing</li> <li>• Lessons Learned (DED 1-9)</li> </ul>
1	1.7	Phase Closure (Conditional Acceptance) <ul style="list-style-type: none"> <li>• Post-live training topics scheduled, if applicable</li> <li>• Support transition call complete</li> </ul>
2	2.1	Radnor Township Acceptance of Phase Schedule <ul style="list-style-type: none"> <li>• Kick-off complete</li> </ul>

		<ul style="list-style-type: none"> <li>Project Plan accepted and posted to project SharePoint site (DED 2-2)</li> <li>User Manuals Provided (DED 2-3)</li> </ul>
2	2.2	<p>Authorization to Proceed to SET</p> <ul style="list-style-type: none"> <li>As-is/to-be analysis complete</li> <li>Data Conversion Plan accepted (DED 2-4)</li> <li>System design Document completed with initial to-be decisions (DED 2-5)</li> <li>Static Environment Test plan accepted (DED 2-6)</li> </ul>
2	2.3	<p>Authorization to Proceed to Training</p> <ul style="list-style-type: none"> <li>Static Environment Test complete</li> <li>System Design Document updated with to-be decisions (DED 2-5)</li> </ul>
2	2.4	<p>Authorization to Proceed to Live Preparation</p> <ul style="list-style-type: none"> <li>Training complete for all applicable processes</li> <li>Go-live planning complete</li> <li>Authorization to load Tyler Forms Libraries</li> <li>Pre-live check list accepted (DED 2-8)</li> </ul>
2	2.5	<p>Sign-off to begin Live Processing</p> <ul style="list-style-type: none"> <li>Go-live checklist complete</li> <li>Authorization to load required data conversions into Live/Production</li> <li>Authorization to begin live processing</li> <li>Lessons Learned (DED 2-9)</li> </ul>
2	2.6	<p>Phase Closure (Conditional Acceptance)</p> <ul style="list-style-type: none"> <li>Post-live training topics scheduled, if applicable</li> <li>Support transition call complete</li> </ul>
3	3.1	<p>Radnor Township Acceptance of Phase Schedule</p> <ul style="list-style-type: none"> <li>Kick-off complete</li> <li>Project Plan accepted and posted to project SharePoint site (DED 3-2)</li> <li>User Manuals Provided (DED 3-3)</li> </ul>
3	3.2	<p>Authorization to Proceed to SET</p> <ul style="list-style-type: none"> <li>As-is/to-be analysis complete</li> <li>Data Conversion Plan accepted (DED 3-4)</li> <li>System design Document completed with initial to-be decisions (DED 3-5)</li> <li>Static Environment Test plan accepted (DED 3-6)</li> </ul>
3	3.3	<p>Authorization to Proceed to Training</p> <ul style="list-style-type: none"> <li>Static Environment Test complete</li> <li>System Design Document updated with to-be decisions (DED 3-5)</li> </ul>
3	3.4	<p>Authorization to Proceed to Live Preparation</p> <ul style="list-style-type: none"> <li>Training complete for all applicable processes</li> <li>Go-live planning complete</li> </ul>



		<ul style="list-style-type: none"> <li>• Authorization to load Tyler Forms Libraries</li> <li>• Pre-live check list accepted (DED 3-8)</li> </ul>
3	3.5	<p>Sign-off to begin Live Processing</p> <ul style="list-style-type: none"> <li>• Go-live checklist complete</li> <li>• Authorization to load required data conversions into Live/Production</li> <li>• Authorization to begin live processing</li> <li>• Lessons Learned (DED 3-9)</li> </ul>
3	3.6	<p>Phase Closure (Conditional Acceptance)</p> <ul style="list-style-type: none"> <li>• Post-live training topics scheduled, if applicable</li> <li>• Support transition call complete</li> </ul>
4	4.1	<p>Radnor Township Acceptance of Phase Schedule</p> <ul style="list-style-type: none"> <li>• Kick-off complete</li> <li>• Project Plan accepted and posted to project SharePoint site (DED 4-2)</li> <li>• User Manuals Provided (DED 4-3)</li> </ul>
4	4.2	<p>Authorization to Proceed to SET</p> <ul style="list-style-type: none"> <li>• As-is/to-be analysis complete</li> <li>• Data Conversion Plan accepted (DED 4-4)</li> <li>• System design Document completed with initial to-be decisions (DED 4-5)</li> <li>• Static Environment Test plan accepted (DED 4-6)</li> </ul>
4	4.3	<p>Authorization to Proceed to Training</p> <ul style="list-style-type: none"> <li>• Static Environment Test complete</li> <li>• System Design Document updated with to-be decisions (DED 4-5)</li> </ul>
4	4.4	<p>Authorization to Proceed to Live Preparation</p> <ul style="list-style-type: none"> <li>• Training complete for all applicable processes</li> <li>• Go-live planning complete</li> <li>• Authorization to load Tyler Forms Libraries</li> <li>• Pre-live check list accepted (DED 4-8)</li> </ul>
4	4.5	<p>Sign-off to begin Live Processing</p> <ul style="list-style-type: none"> <li>• Go-live checklist complete</li> <li>• Authorization to load required data conversions into Live/Production</li> <li>• Authorization to begin live processing</li> <li>• Lessons Learned (DED 4-9)</li> </ul>
4	4.6	<p>Phase Closure (Conditional Acceptance)</p> <ul style="list-style-type: none"> <li>• Post-live training topics scheduled, if applicable</li> <li>• Support transition call complete</li> </ul>
5	5.1	<p>Radnor Township Acceptance of Phase Schedule</p> <ul style="list-style-type: none"> <li>• Kick-off complete</li> <li>• Project Plan accepted and posted to project SharePoint site (DED 5-2)</li> <li>• User Manuals Provided (DED 5-3)</li> </ul>

5	5.2	<p>Authorization to Proceed to SET</p> <ul style="list-style-type: none"> <li>As-is/to-be analysis complete</li> <li>Data Conversion Plan accepted (DED 5-4)</li> <li>System design Document completed with initial to-be decisions (DED 5-5)</li> <li>Static Environment Test plan accepted (DED 5-6)</li> </ul>
5	5.3	<p>Authorization to Proceed to Training</p> <ul style="list-style-type: none"> <li>Static Environment Test complete</li> <li>System Design Document updated with to-be decisions (DED 5-5)</li> </ul>
5	5.4	<p>Authorization to Proceed to Live Preparation</p> <ul style="list-style-type: none"> <li>Training complete for all applicable processes</li> <li>Go-live planning complete</li> <li>Authorization to load Tyler Forms Libraries</li> <li>Pre-live check list accepted (DED 5-8)</li> </ul>
5	5.5	<p>Sign-off to begin Live Processing</p> <ul style="list-style-type: none"> <li>Go-live checklist complete</li> <li>Authorization to load required data conversions into Live/Production</li> <li>Authorization to begin live processing</li> <li>Lessons Learned (DED 5-9)</li> </ul>
5	5.6	<p>Phase Closure (Conditional Acceptance)</p> <ul style="list-style-type: none"> <li>Post-live training topics scheduled, if applicable</li> <li>Support transition call complete</li> </ul>
6	6.1	<p>Radnor Township Acceptance of Phase Schedule</p> <ul style="list-style-type: none"> <li>Kick-off complete</li> <li>Project Plan accepted and posted to project SharePoint site (DED 6-2)</li> <li>User Manuals Provided (DED 6-3)</li> </ul>
6	6.2	<p>Authorization to Proceed to SET</p> <ul style="list-style-type: none"> <li>As-is/to-be analysis complete</li> <li>Data Conversion Plan accepted (DED 6-4)</li> <li>System design Document completed with initial to-be decisions (DED 6-5)</li> <li>Static Environment Test plan accepted (DED 6-6)</li> </ul>
6	6.3	<p>Authorization to Proceed to Training</p> <ul style="list-style-type: none"> <li>Static Environment Test complete</li> <li>System Design Document updated with to-be decisions (DED 6-5)</li> </ul>
6	6.4	<p>Authorization to Proceed to Live Preparation</p> <ul style="list-style-type: none"> <li>Training complete for all applicable processes</li> <li>Go-live planning complete</li> <li>Authorization to load Tyler Forms Libraries</li> <li>Pre-live check list accepted (DED 6-8)</li> </ul>
6	6.5	<p>Sign-off to begin Live Processing</p>



		<ul style="list-style-type: none"> <li>• Go-live checklist complete</li> <li>• Authorization to load required data conversions into Live/Production</li> <li>• Authorization to begin live processing</li> <li>• Lessons Learned (DED 6-9)</li> </ul>
6	6.6	Phase Closure (Conditional Acceptance) <ul style="list-style-type: none"> <li>• Post-live training topics scheduled, if applicable</li> <li>• Support transition call complete</li> </ul>

\* Note: Radnor Township may authorize Tyler to proceed with the project and withhold acceptance of the control point. For the control point to be accepted, all work identified under each must be complete.

### **E.3 Project Initiation**

During this step, Tyler and Radnor Township will begin working to plan the project kick off meeting. The kick off will be scheduled and completed no later than sixty calendar (60) days after contract signing, but not before the Phase 1 project plan is completed. During the kick off, Tyler’s project team will meet Radnor Township’s project team and discuss project expectations and policies. All team members will be present for the project kick off.

#### **E.3.1 Task – Project Kick Off**

	Radnor Township Role	Tyler Role
Steering Committee	<ul style="list-style-type: none"> <li>• Participate in kick off meeting</li> </ul>	
Project Manager	<ul style="list-style-type: none"> <li>• Review SOW</li> <li>• Coordinate kick off meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Review SOW</li> <li>• Coordinate kick off meeting</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Review SOW</li> <li>• Participate in kick off meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Review SOW</li> <li>• Participate in kick off meeting</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Participate in kick off meeting</li> </ul>	

#### **E.3.2 Requirements/Notes**

- All Tyler Project Managers and Implementation Consultants will become familiar with the contract, SOW, and any applicable Radnor Township policies.
- The kick off meeting presentation will be a collaborative effort between Radnor Township and Tyler
- Tyler will lead development of the kick off presentation (Radnor Township to provide input) and the kick off presentation will be developed specific to the Radnor Township project (not a generic kick off PowerPoint template).
- Kick Off meetings will occur prior to the beginning of each phase.

#### **E.3.3 Outcomes/Deliverables**



- Deliverables:
- Project Outcomes:
  - Introduction of all key project team members
  - All project team members understand project and contract requirements
  - Radnor Township project team members understand Tyler implementation approach

## **E.4 Project Planning**

Radnor Township and Tyler will work to develop customized project plans and implementation management plans that document key project management processes and policies. The project management plans will establish project policies for the duration of the project and be consistent across all phases of the project. Overall project planning will occur at the beginning of the project for all phases and the implementation management plan (DED-1) will be developed to cover all phases. As part of the implementation management plan tasks Tyler will provide change management training. The project plan, as defined in Section C.1 will occur in phases.

### **E.4.1 Develop Implementation Management Plans**

	Radnor Township Role	Tyler Role
Steering Committee	• See DED 1	• See DED 1
Project Manager	• See DED 1	• See DED 1
Project Team / Implementation Consultant	• See DED 1	• See DED 1
Subject Matter Expert / Other	• See DED 1	• See DED 1

### **E.4.2 Develop Project Plan**

	Radnor Township Role	Tyler Role
Steering Committee	• See Section C.1	• See Section C.1
Project Manager	• See Section C.1	• See Section C.1
Project Team / Implementation Consultant	• See Section C.1	• See Section C.1
Subject Matter Expert / Other	• See Section C.1	• See Section C.1

### **E.4.3 Requirements/Notes**

- Project Planning will occur in full during Phase 1. For subsequent phases, the Tyler Project Manager and Radnor Township Project Manager will review plans and make any necessary changes, as applicable.

### **E.4.4 Outcomes/Deliverables**

- Deliverables:

- Deliverable 1: Implementation Management Plans (DED 1)
- Deliverable 2: Project Plan/Schedule (DED 2)
- Deliverable 3: Standard Tyler Munis User Manuals (DED 3)
  
- Project Outcomes:
  - Project Plan Complete
  - Project Plan Includes Full Scope of Project and is Consistent with SOW Tasks
  - Implementation Plans complete and all project stakeholders understand key project management processes and roles throughout the project.
  
- Control Point(s):
  - Phase Schedule Accepted

## **E.5 Structural Foundation**

The Structural Foundation includes tasks required to start a Munis implementation.

### **E.5.1 Chart of Accounts (CoA) design**

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>● Build CoA Spreadsheet</li> <li>● Review and confirm CoA in spreadsheet was loaded correctly</li> <li>● Schedule load of converted CoA into Munis</li> </ul>	<ul style="list-style-type: none"> <li>● Discuss CoA options</li> <li>● Facilitate discussions on CoA Best practices</li> <li>● Demonstrate CoA options in Munis</li> <li>● Train Radnor Township on preparing CoA Spreadsheet</li> <li>● Review and validate CoA spreadsheet</li> </ul>
Subject Matter Expert / Other		

### **E.5.2 Software installation**

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>● Participate in software installation activities</li> </ul>	<ul style="list-style-type: none"> <li>● Coordinate software installation activities</li> </ul>
Project Team / Implementation Consultant		
Technical Team	<ul style="list-style-type: none"> <li>● Participate in providing necessary information for connectivity and access to system once configured</li> </ul>	<ul style="list-style-type: none"> <li>● Install software</li> </ul>

### **E.5.3 Initial System Administration Training.**

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>• Schedule training attendees</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinate Training</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Attend Training</li> </ul>	<ul style="list-style-type: none"> <li>• Provide Training</li> <li>• Provide training materials/documentation</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Attend Training (Radnor Township Technical Team)</li> </ul>	

#### **E.5.4 Project Team Overview:**

During this step, Tyler will provide Radnor Township Project Team members an overview on standard functionality and module integration points to better understand the system prior to making any project or business processes decisions.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>• Schedule training and secure training facilities</li> <li>• Attend scheduled sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule and coordinate</li> <li>• Provide overview system training on standard Munis features</li> <li>• Provide “how-to” documentation for all purchased modules</li> <li>•</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Attend sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Provide overview</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Attend sessions, as necessary</li> </ul>	
Tyler University Manager / Tyler Project Manager	<ul style="list-style-type: none"> <li>• Provide project team login details and curriculum assignments for Tyler University</li> <li>• Ensure users are able to access and enroll in Tyler University courses</li> </ul>	<ul style="list-style-type: none"> <li>• Provide Tyler University user and curriculum requirements</li> <li>• Coordinate setup of Tyler University users</li> </ul>

#### **E.5.5 Requirements/Notes**

- With the exception of project team training, Structural foundation will only occur for Phase 1

##### **Chart of Accounts**

- Radnor Township will complete the Tyler Munis CoA workbook as instructed by Tyler consultants
- Tyler consultants will explain and follow up on any Radnor Township questions related to most applicable configurations of the CoA.
- Tyler consultants will review all federal, grantor, or other requirements for the Radnor Township chart of accounts and ensure that the set up will be sufficient to handle any reporting, tracking, or budgeting needs of Radnor Township.



**Installation**

- Tyler will install any third party software included as part of the scope of the project phase

**System Admin Training**

- System admin training will be provided for the Radnor Township Technical Team and select members of the Radnor Township Project Team.

**Project Team Overview**

- Training documents and videos used as prerequisites for the sessions will be referenced on the agendas and available on Tyler University, the project SharePoint site or linked to our Knowledge Base for easy access by attendees. Radnor Township will be responsible for printing any necessary documents for the users, as needed.
- Prior to scheduled sessions, all users must have access to the training environment. The users must have logins established and know how to access the training environment.
- Project team members will be setup and enrolled in their respective Tyler University curriculums with enough time to complete prerequisite courses.
- Project Team shall complete all prerequisite Tyler University requirements prior to attending related training sessions.

**E.5.6 Outcomes/Deliverables**

- Deliverables:
  - N/A
- Project Outcomes:
  - Munis successfully installed and system installation accepted by Radnor Township
  - Project team members trained on standard Munis features
  - Chart of accounts defined and loaded into Munis.
- Control Point(s):
  - Chart of Accounts Design Acceptance

**E.6 Knowledge Transfer**

Knowledge transfer for the project includes tasks necessary to, conduct an as-is analysis, provide to-be demonstrations, and document system set-up decisions. As part of the as-is analysis, Tyler will review all in scope items (both functional and organizational) scope to best assess how the Radnor Township should be configuring Munis. Prior to the project, Radnor Township completed detailed as-is process maps. Tyler consultants will review all Radnor Township documentation and be familiar with current processes prior to analysis meetings. As-is analysis is intended to review detailed Radnor Township needs and how Munis would be configured to meet these needs.

**E.6.1 As-Is Analysis**

Radnor Township Role	Tyler Role
----------------------	------------

Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Complete process questionnaires</li> <li>• Participate in As-Is Sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Review Radnor Township project documentation</li> <li>• Review as-is process maps</li> <li>• Provide process questionnaires</li> <li>• Conduct analysis of Radnor Township business processes</li> <li>• Identify detailed configuration requirements</li> <li>• Review inventory of processing, configuration and data flow options</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Participate in As-Is Sessions</li> </ul>	

### **E.6.2 Data Conversion Analysis**

Tyler consultants will complete a data conversion analysis. During the analysis current data systems will be reviewed and consultants will determine with Radnor Township staff a plan for data conversion. Data conversion plan will include:

- Scope of data conversion
- Level of detail converted
- Historical data converted
- Identification of current data sources
- Strategy and timing for data conversion

Tyler will provide detailed Conversion schemas as a guide to the types of data that can be converted, the specific fields available in Munis and other significant information. These schemas are distributed for all purchased conversions and help guide the data mapping process.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Make decisions on data conversion plans</li> <li>• Identify current data to be converted</li> </ul>	<ul style="list-style-type: none"> <li>• Review contracted data conversions</li> <li>• Review current data</li> <li>• Provide recommendations for data conversion</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Identify current data to be converted</li> </ul>	

### **E.6.3 Security Analysis**

Application security needs are defined during analysis. All user access roles and permissions are reviewed and options are discussed and implemented along with their particular module. Tyler will conduct the security analysis for all the types of users being implemented within each phase. As part of the security

analysis, Tyler will deliver a security matrix to assist Radnor Township to identify appropriate permissions and roles needed to meet Radnor Township business processes.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Attend meetings</li> <li>• Make security decisions</li> <li>• Document security decisions in security matrix</li> </ul>	<ul style="list-style-type: none"> <li>• Review Radnor Township business process and facilitate process to define user access roles and permissions</li> <li>• Identify correct Munis security features to match to Radnor Township business process decisions</li> </ul>
Subject Matter Expert / Other		

#### **E.6.4 Workflow Analysis**

Workflow business rules are defined during analysis and users will be trained to set up all workflow functionality to accommodate Radnor Township’s business practices. All available workflow options are discussed and implemented along with their particular module analysis and setup training sessions. Tyler will conduct the workflow analysis for all workflows applicable to the modules being implemented and processes decided upon. As part of the workflow analysis, Tyler will deliver a workflow matrix to assist Radnor Township to identify appropriate workflow roles and processes configurations to meet Radnor Township business processes.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Attend meetings</li> <li>• Make workflow decisions</li> <li>• Document workflow decisions in workflow matrix</li> </ul>	<ul style="list-style-type: none"> <li>• Review Radnor Township business process and facilitate process to define new Munis workflows</li> <li>• Identify correct Munis workflow features to match to Radnor Township business process decisions</li> </ul>
Subject Matter Expert / Other		

#### **E.6.5 Custom Interface Analysis**

Custom Interfaces involve creating custom layout, web services, etc. for the purpose of receiving, sending, or exchanging data between Munis and a third party system.



So long as the 3<sup>rd</sup> party system integrating with Munis can use the existing Munis formats / methods, then programming charges will not be required. However, if Tyler needs to change any of its formats to meet the needs of 3<sup>rd</sup> party products, the desired changes would follow the process outlined in the Scope/Contract Change Process section.

Tyler will train on the standard import and export functionality within the contracted modules, as needed.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Identify requirements for interfaces</li> <li>• Coordinate third party interface needs/development</li> <li>• Document Interface</li> </ul>	<ul style="list-style-type: none"> <li>• Review existing standard interface options within Munis</li> </ul>
Subject Matter Expert / Other		

#### **E.6.6 Program Modifications Analysis**

Program customizations or modifications (“Program Modifications”) require changes or additions in program functionality in order to affect some new, desired result within the Munis programs. No program modifications have been identified and contracted in the scope of this project. Desired changes would follow the process outlined in the Scope/Contract Change Process section.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• See DED 07</li> </ul>	<ul style="list-style-type: none"> <li>• See DED 07</li> </ul>
Subject Matter Expert / Other		

#### **E.6.7 To-Be Decisions**

	Radnor Township Role	Tyler Role
Steering Committee	<ul style="list-style-type: none"> <li>• Review business process decisions</li> <li>• Make decisions elevated to steering committee</li> </ul>	
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Make decisions on business process</li> <li>• Document system design decisions</li> <li>• Develop customized user documentation</li> <li>• Conduct internal meetings to</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct analysis of desired process changes</li> <li>• Review Flow Charts</li> <li>• Review available options</li> <li>• Review module parameters, code configurations and work flow options</li> </ul>

	review design decisions for Static Environment Test	<ul style="list-style-type: none"> <li>• Conduct analysis of set up tables codes and parameters</li> <li>• Review Munis set up options to facilitate to-be decisions</li> <li>• Prepare System Design Document (DED -5)</li> </ul>
Subject Matter Expert / Other		

**E.6.8 Requirements/Notes**

- All project decisions will be documented in a system design document (DED 5).
- Project decisions and system design documentation will reference the Radnor Township functional requirements

**E.6.9 Outcomes/Deliverables**

- Deliverable(s):
  - Data Conversion Plan (DED 4)
  - System Design Document (DED 5)
    - Workflow Matrix
    - Security Matrix
  - Modification Specifications, if applicable (DED 7)
- Project Outcomes:
  - Review and analysis of all Radnor Township business processes in scope for project
  - Radnor Township and Tyler review of best practice recommendations and decision on to-be process
  - Radnor Township makes all necessary business process and configuration decisions
  - Tyler documents all Munis set up decisions in system design document
- Control Point(s):
  - Authorization to Proceed to Static Environment Test

**E.7 Static Environment Test (SET)**

The Static Environment Test (SET) is designed to test and prove the process decisions made during business process consulting. This test is completed on a clean database with a subset of hand entered (not converted) data provided by Radnor Township. This ensures that Radnor Township is familiar with the data being tested and is able to verify the processes as the test is conducted by Tyler staff. After the SET is complete, implementation activities such as conversions, core user training and testing will begin.

For the payroll phase of the project, SET will occur after initial set up table training and training on how to build employees. This will allow Radnor Township Core Users to view the process using their actual set up and data, and to make process decisions based on the required set up. The first pass of the employee master and deductions may also be done prior to the SET. The Tyler Project Manager will include all activities and their timing in the payroll phase project plan.

Radnor Township Role	Tyler Role
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Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Prepare/gather test data</li> <li>• Review and provide feedback on SET test script</li> <li>• Participate in SET Test Session</li> <li>• Assess project decisions and validate/correct project decisions.</li> <li>• Revise system design document as required.</li> <li>• Re-perform SET Test for any changes to major decisions</li> </ul>	<ul style="list-style-type: none"> <li>• Develop SET Test Script (DED 6)</li> <li>• Facilitate and lead SET Test</li> <li>• Document results from SET Test</li> <li>• Re-perform SET Test for any changes to major decisions</li> <li>• Send forms output data to Tyler Forms team for each form in the scope of the respective Phase.</li> </ul>
Subject Matter Expert / Other		

**E.7.1 Requirements / Notes**

- The Static Environment Test will be used to test business and configuration decisions. After the Static Environment Test, items that Radnor Township identified as open issues will be re-evaluated, new decisions made, and the items re-tested.
- The Static Environment Tests will be organized by module, but will include all necessary cross module processes so that Radnor Township can evaluate the integration between modules and its impact on business processes.

**E.7.2 Outcomes/Deliverables**

- Deliverable(s):
  - Static Environment Test Plan (DED 6)
- Project Outcomes:
  - Major business process and Munis set up decisions are tested and validated.
  - Forms output data sent to Tyler Forms to begin the forms design process
  - Radnor Township ready to begin full configuration of Munis consistent with DED 5: System design document
- Control Point(s):
  - Authorization to Proceed to Implementation

**E.8 Implementation**

The implementation process includes table building and setup, data conversion and proofing, forms design and testing, modifications and interface testing, core user training, and parallel processing or process testing.

**E.8.1 Table Building and Set Up**

Tyler will train Radnor Township on all system set up tables (codes, global settings, user permissions, etc.). Radnor Township is responsible for entering codes into the live Munis database, as instructed.



	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Radnor Township builds Set Up tables</li> <li>• Radnor Township builds Workflow</li> </ul>	<ul style="list-style-type: none"> <li>• Train Radnor Township on completion of Set Up Tables according to analysis sessions</li> <li>• Train Radnor Township on Workflow completion</li> </ul>
Subject Matter Expert / Other		

### **E.8.2 Data Conversion and Proofing**

Tyler will train Radnor Township on the use of all programs needed to proof conversion data. That includes maintenance, inquiry, and reporting programs. Tyler will assist Radnor Township on all initial conversion passes so that Radnor Township has the necessary knowledge and tools to proof conversion data. Radnor Township is responsible for proofing conversion data and signing off before the conversions are loaded into LIVE.

Tyler will provide detailed Conversion schemas as a guide to the types of data that can be converted, the specific fields available in Munis and other significant information. These schemas are distributed for all purchased conversions and help guide the data mapping process.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Radnor Township pulls data from legacy system (-)</li> <li>• Radnor Township produces balancing reports</li> <li>• Radnor Township documents and submits needed corrections to conversion</li> </ul>	<ul style="list-style-type: none"> <li>• Train Radnor Township on methods for validating converted data in Munis</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Radnor Township pulls data from legacy system (-)</li> <li>• Radnor Township produces balancing reports</li> <li>• Radnor Township is responsible for producing reports from the legacy system at the time of data extraction. These reports are critical for use during conversion validation</li> <li>• Schedule load all conversion passes as directed by Tyler PM</li> <li>• Tyler will produce an error report outlining errors that result from running Radnor Township's data</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare system parameters and codes to align with data mapping</li> <li>• Write and execute program to convert submitted data according to crosswalk</li> <li>• Through analysis, fields in legacy systems and Munis will be outlined for conversion. Tyler staff will use best efforts to direct Radnor Township on the legacy source files and desired fields for conversion mapping</li> <li>• Tyler will program conversion programs according to the accepted file submission layout.</li> </ul>

	<p>through the conversion program. Radnor Township is responsible for reviewing the report and investigating solutions</p> <ul style="list-style-type: none"> <li>• Radnor Township validates converted data using error reports, balancing reports, etc.</li> </ul>	

**E.8.3 Forms Design and Proofing**

Using the data extracted during the Static Environment Test process, output data is sent to Tyler’s Forms Design team to create proofs for each of the forms in scope for the respective Phase. Tyler’s Forms Team merges the data according to the decisions and options from the Forms Kits. The proofs are sent back to Radnor Township in an iterative process to review for accuracy or report any necessary adjustments. Once Form proofs have been accepted and forms are loaded on Radnor Township’s server, testing continues throughout the balance of the implementation. The goal, at a minimum, is to print forms as part of SME training so that both the content and process are validated repeatedly.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>• Radnor Township accepts form design and authorizes installation</li> </ul>	
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Radnor Township fills out Tyler Forms Kits</li> <li>• Radnor Township validates form design, content and layout</li> <li>• Submit forms to bank for approval.</li> </ul>	<ul style="list-style-type: none"> <li>• Assist in data mapping questions</li> <li>• Assist in issue resolution</li> </ul>
Subject Matter Expert / Other		<ul style="list-style-type: none"> <li>• Tyler Forms creates form designs from Radnor Township mock-ups</li> <li>• Tyler Forms merges data from To-Be Test with Form designs</li> <li>• Tyler sends form design proofs for review and acceptance</li> <li>• Tyler Forms installs Forms Server on Radnor Township Forms server</li> <li>• Tyler installs Forms Library on Radnor Township forms server</li> </ul>

**E.8.4 Program Modifications/Interfaces**

In the event of an approved Scope Change involving a Program modification or interface, Tyler will provide all in scope program modifications and interfaces according to the timelines mutually agreed to and documented on the project plan. Upon receipt of the program modification or interfaces, Tyler Implementation Consultants will initially test the program modification or interface to ensure it meets the specifications identified in (DED 7) and then submit to Radnor Township for additional testing.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>• Modification sign off</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinate sign off</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Radnor Township will validate performance of customization through repeated unit testing as well as process testing throughout implementation</li> </ul>	
Subject Matter Expert / Other		<ul style="list-style-type: none"> <li>• Tyler will program changes as outlined in the signed specification document. Changes subsequent to sign-off will be considered out of scope and may require repetition of previous steps</li> <li>• Tyler's QA team will test customization within applicable, impacted modules</li> <li>• Tyler will deliver and demonstrate customization as scheduled. Demonstration will include validating compliance with written specification</li> <li>• Programs will be developed to import/export Tyler data in format required</li> <li>• A document is created describing the interface and how to utilize it</li> </ul>

### E.8.5 SME Training

Tyler will train all Radnor Township SMEs to perform ongoing training of Decentralized End Users. The Tyler Project Manager will provide a proposed training schedule based on target live dates and availability of resources (Tyler Implementation Consultants, Radnor Township trainees, training room, etc.).

- Radnor Township Project Manager/Team will be trained according to the schedule developed by the Tyler Project Manager for the Education Plan detailed in the Tyler Implementation Management Plan (DED-01).

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Attend training on completing Trial Run/Parallel processes</li> <li>• Complete Trial Run/Parallel process steps, identify discrepancies and correct</li> </ul>	<ul style="list-style-type: none"> <li>• Perform test of Tyler Forms through process testing and training</li> <li>• Train Project Team Leads/Subject Matter Experts on applicable Munis processing</li> <li>• Train Radnor Township on completing Trial Run/Parallel processes</li> <li>• Train Radnor Township on process of printing and testing forms</li> </ul>



Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>Attend Training</li> <li>Complete Trial Run/Parallel process steps, identify discrepancies and correct</li> </ul>	
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### **E.8.6 Report Training**

Training will be conducted during all phases of the implementation on Tyler reporting. Tyler uses a “train the trainer” approach, which will provide the Radnor Township Project Team the tools necessary to fully use the Tyler reporting tools and to train additional users on the subject matter as they see fit.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>Coordinate report training</li> </ul>	
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>Attend report training</li> </ul>	<ul style="list-style-type: none"> <li>Conduct report training</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>Attend report training</li> </ul>	

### **E.8.7 Requirements / Notes**

- Table Building and Set Up –**
  - All homework tasks will be listed on the project plan
- Data Conversion -** Tyler makes the following assumptions in providing a fixed-price data conversion approach:
  - Legacy system data to be converted is provided in a non-proprietary format, such as fixed ASCII, CSV or character-delimited files
  - Each legacy system data file submitted for conversion includes all associated records in a single file layout
  - Each legacy system data file layout submitted for conversion remains static for all subsequent data submissions, unless mutually agreed upon in advance of the change.
  - Legacy system data validation and control reports are provided with each data submission to ensure data files are complete and accurate
  - Conversion validation is performed after each pass of converted data is loaded into a testing database. Use of control reports, filtering techniques, comparison reports and visual inspection are all part of this process. The purpose is to identify all issues with data, whether due to mapping inconsistencies, source data issues, data submission content or conversion programming errors. Radnor Township must review and provide authorization to proceed to final conversions before the pre-live period so that final conversion submissions have little or no risk of data or conversion programming issues. This authorization to proceed is necessary prior to live processing as the last step before data is loaded in the live database and live processing begins. This testing is part of pre-live assessment.
  - Tyler will program conversion programs according to the accepted file submission layout. This layout must be maintained consistently for all future data submissions.
- Forms Design**

- Radnor Township must receive bank approval for all check forms a minimum of thirty (30) calendar days before live processing. This testing is part of pre-live assessment.
- **Program Modifications/Interfaces**
  - Tyler will provide a separate (DED 7) for each contracted program modification
- **SME Training**
  - Training documents and videos used as prerequisites for the sessions will be referenced on the agendas and available on the SharePoint site or linked to our Knowledge Base for easy access by attendees. Radnor Township will be responsible for printing the necessary documents for the users, as needed.
  - Prior to scheduled training sessions, all users must have access to the Munis training environment. The users must have logins established and know how to access the training environment.
  - Navigational Videos - Tyler will provide Knowledgebase URL links to any referenced or required Munis navigational videos to Radnor Township.

**E.8.8 Outcomes/Deliverables**

- Deliverable:
  - None
- Project Outcomes:
  - Munis system has been configured to meet the functional requirements, SOW, and System Design Document (DED 5).
- Control Point(s):
  - Authorization to Proceed to Live Preparation

**E.9 Live Preparation**

This step allows the Project Team to review the status of the project and its readiness to go live on plan. As part of live preparation, Radnor Township will complete user acceptance testing (Conditional Acceptance), end user training, final data conversions, and prepare a pre-live checklist.

**E.9.1 User Acceptance Testing**

User Acceptance testing is conducted both leading up to and following end-user training. While some recommend that user acceptance testing is all performed post end-user training, Tyler supports incremental user acceptance testing through trial run processing in Financials and parallel processing in Payroll and Human Resources. Early trial runs and parallels will most likely not involve end-users, once again isolating them from any issues that may be discovered through the process. Once processes are stabilized and can be completed without significant error, the user acceptance testing will expand to include End Users. Once the implementation project is complete, Radnor Township will have sufficient time as identified in the agreement to conduct full user acceptance testing and grant Conditional Acceptance prior to go-live.

	Radnor Township Role	Tyler Role
Steering Committee		



Project Manager	<ul style="list-style-type: none"> <li>• Coordinate User Acceptance Test</li> </ul>	
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Conduct User Acceptance Test</li> </ul>	
Subject Matter Expert / Other		

### **E.9.2 End User Training**

Radnor Township trainers will provide training to all of Radnor Township’s End Users. Radnor Township will be responsible for End User Training.

### **E.9.3 End User Training**

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>• Coordinate all logistics for End User Training</li> </ul>	<ul style="list-style-type: none"> <li>• Provide template training materials and template training agendas</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Develop training materials</li> <li>• Train End Users</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule and track completion of training on the project plan</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Attend Training</li> </ul>	

### **E.9.4 Pre-Live Planning**

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>• Meet to outline go-live steps, requirements and assignments</li> <li>• Evaluate readiness of Radnor Township staff to perform live process from training and change management prospective</li> </ul>	<ul style="list-style-type: none"> <li>• Meet to outline go-live steps, requirements and assignments</li> <li>• Evaluate readiness of Radnor Township staff to perform live process from training and change management prospective</li> </ul>
Project Team / Implementation Consultant		
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Radnor Township performs any desired stress testing</li> </ul>	

### **E.9.5 Final Data Conversions**

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager	<ul style="list-style-type: none"> <li>• Radnor Township ceases activities in applicable legacy applications</li> </ul>	
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Radnor Township ceases activities in applicable legacy applications</li> </ul>	



Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Radnor Township ceases activities in applicable legacy applications</li> <li>• Radnor Township pulls Final Conversion data and submits to Tyler</li> <li>• Radnor Township validates converted data using error reports, balancing reports, etc.</li> <li>• Radnor Township accepts final conversions and authorizes them to be loaded in Live Database</li> <li>• Schedule load of data into Live environment</li> </ul>	<ul style="list-style-type: none"> <li>• Execute program to convert submitted final data according to crosswalk</li> <li>• Work with Radnor Township to confirm readiness to load data into Live environment</li> </ul>
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**E.9.6 Requirements / Notes**

User Acceptance

- User Acceptance periods will be scheduled in the project plan. Prior to User Acceptance, the system will be configured to meet all functional requirements.

End User Training

- End User Training will occur after Conditional Acceptance has been granted.
- Prior to scheduled training sessions, the Tyler and Radnor Township will make sure the following prerequisites are met:
  - Training Database - All users must have access to the Munis training environment. The users must have logins established and know how to access the training environment.
  - Tyler will provide interactive eLearnings to Radnor Township via Tyler University. The eLearnings demonstrate basic functions including: navigation, general concepts and process flow, add/update/output, search, and a common toolbar.

Pre-Live Planning:

- NA

Final Data Conversions

- NA

**E.9.7 Outcomes/Deliverables**

- Deliverable(s):
  - Pre-Live Checklist (DED 8)
- Project Outcomes:
  - All end-users included in training plan are trained on system and business processes
  - Radnor Township makes decision to go-live
  - Radnor Township grants conditional acceptance of the system
- Control Point(s):
  - Signoff to Begin Live Processing

## **E.10 Live Processing**

Upon the decision to go-live, Tyler’s Implementation Consultants will assist Radnor Township users in entering and completing transactions in the Live system as well as troubleshooting assistance for desired setup changes or data conversion issues.

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant		<ul style="list-style-type: none"> <li>• Provide go-live assistance</li> <li>• Provide setup and data conversion troubleshooting</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Radnor Township users utilize Munis for live processing</li> </ul>	

### **E.10.1 Requirements / Notes**

- Radnor Township will track any open issues or new issues through the issues log during Live Processing.

### **E.10.2 Outcomes/Deliverables**

- Deliverable
  - NA
- Project Outcomes:
  - Radnor Township is using Munis for live processing

## **E.11 Post Live Process**

After Radnor Township is using the system for live processing, Tyler will provide additional training using actual Radnor Township-processed data as outlined in the Requirements/Notes. A review of System Design document is done to ensure that the processes put into place using the Munis system are being adhered to, or adjusted as necessary.

Radnor Township, with input and assistance from the Tyler, will be responsible to execute against the post-go-live support plan and provide post go-live support in order to complete the conversion to Munis. This will include functional and technical assistance from Tyler in the following areas, per phase:

- Problem analysis and resolution
- Problem tracking
- Guidance and mentoring to Radnor Township staff who provide Munis application support functions and user help desk support (problem resolution)
- Respond to help requests and resolve system defects
- Coaching users on use of the new system
- Support and direct assistance for business owner departments (Finance, Procurement, Benefits, Human Resources, Information Technology, etc.)

- Provide proactive support and special attention to processes and departments for functions that are run for the first time during the post go-live period and any functions that are executed for the first time after the go-live period

	Radnor Township Role	Tyler Role
Steering Committee		
Project Manager		
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>• Review policy and procedure decisions</li> </ul>	<ul style="list-style-type: none"> <li>• On-site to resolve issues</li> <li>• Train Radnor Township on SSRS Reporting Tools</li> <li>• Facilitate review of policy and produce decisions</li> <li>• Provide training on reconciliation process</li> </ul>
Subject Matter Expert / Other	<ul style="list-style-type: none"> <li>• Radnor Township users utilize Munis for live processing</li> <li>• Record issues as identified</li> </ul>	<ul style="list-style-type: none"> <li>• Provide custom reports that are in-scope</li> </ul>

**E.11.1 Requirements / Notes**

- Within the proposed go-live milestone and through coordination with Radnor Township for the post-live plan, Tyler will provide post-go live support after go-live for each project phase.
- Tyler, within the proposed go-live milestone, will also provide post-go live support for all key processes that are run for the first time outside of the initial post go-live support period. Such events include:
  - Fiscal Year End Activities
  - End of Year Payroll and 1099 Activities
  - Benefits Open Enrollment
  - Budget Development
- On-site or scheduled training sessions will be budgeted for and entered into the project plan. Non-scheduled support will also be available through Tyler Technical Support.
- Additional assistance beyond the phase/project closure will be considered out of scope and will require a change order or purchase order for additional services. Additional assistance beyond that specified here will be considered out of scope and will require a change order.

**E.11.2 Outcomes/Deliverables**

- Deliverable(s):
  - Lessons Learned (DED 9)

**E.12 Phase Closure**

This process allows for a formal transition to the Munis support team and a review of the lessons learned during this phase of the project in order to use these lessons on other phases or projects within Radnor Township or at Tyler. Lessons learned will be gathered and documented at each status meeting, and the final lessons learned document will include the lessons documented throughout the project phase.



	Radnor Township Role	Tyler Role
Steering Committee	<ul style="list-style-type: none"> <li>Grant final acceptance</li> </ul>	
Project Manager	<ul style="list-style-type: none"> <li>Coordinate final acceptance process</li> <li>Grant final acceptance for the phase</li> </ul>	<ul style="list-style-type: none"> <li>Initiate transition to support</li> <li>Facilitate Lessons Learned discussion and develop lessons learned document</li> </ul>
Project Team / Implementation Consultant	<ul style="list-style-type: none"> <li>Perform final user acceptance testing</li> <li>Document issues</li> </ul>	<ul style="list-style-type: none"> <li>Troubleshoot and resolve issues related to user acceptance testing</li> </ul>
Subject Matter Expert / Other		

**E.12.1 Requirements / Notes**

- Tyler’s Implementation Consultants will perform training on the identified post-live processes.
- Radnor Township-authorized users shall document and report issues through the provided Tyler support resources

**E.12.2 Outcomes/Deliverables**

- Project Outcomes:
  - Implemented System and Project satisfied all SOW terms and functional requirements
  - Transitioned to Tyler Support
  - Final Acceptance
- Control Point:
  - Acceptance of Project/Phase Closure

## Section F: Homework Requirements

The following outlines major expectations, requirements and, activities surrounding the implementation of the Munis solution:

- Tyler will provide in writing to Radnor Township the trainee prerequisites that must be completed prior to conducting all implementation or training sessions. All prerequisites will be identified on the project plan and communicated to Radnor Township in agenda's for each implementation or training session.
- Tyler will provide in writing to Radnor Township's Project Manager after each training or implementation session what tasks that must be completed prior to Tyler personnel returning to the site. These tasks will be shown on the site report after each site visit and posted on the project SharePoint site. All tasks will also be listed on the project plan.
- Homework assignments and tasks will also be listed on the Project Plan along with due date and owner
- Typical homework items are as follows:
  - Complete set up of tables and codes based on training conducted
  - Practice on processes learned
  - Review any delivered documents prior to attending scheduled training session
- Should Radnor Township not be able to complete communicated prerequisites or tasks, the Radnor Township's Project Manager is to bring it to the attention of the Tyler Project Manager immediately so that assistance can be offered or scheduling be revised.

## Section G: Facility Requirements

The following outlines Radnor Township's requirements for providing a suitable work location to be used by the project.

- Radnor Township will provide a room to be used as a training lab for Tyler staff to transfer knowledge to Radnor Township resources as well as a place for Radnor Township staff to practice what they have learned.
- The room is to be set up in a classroom setting. The number of workstations in the room is to be determined by Radnor Township. It is Tyler's recommendation that every person attending a scheduled session with a Tyler Implementer have their own workstation; however, Tyler requires that there be no more than two people at a given workstation.
- A workstation is to consist of a computer that has access to the Munis training/test database and a printer.
- Radnor Township is to provide a workstation that connects to Munis for the Tyler trainer conducting the session. The computer must be linked to a projector so everyone attending the session is able to follow the information being communicated.
- In addition to computers and a printer, it is recommended that a phone be available in the room as well as a white board with markers and eraser.
- Radnor Township is responsible to schedule the training room for the sessions conducted by Tyler staff.
- Should phases overlap, it may be necessary to make multiple training facilities available.

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## Section H: Appendix

### Appendix 1: Deliverable Expectation Document

A description of each summary deliverable is provided below. All deliverables will be provided electronically in the format used to prepare the deliverable (example: Microsoft Word, Excel) to allow for updates and revisions.

<b>Deliverable Number:</b> DED-1 (1-1)	
<b>Deliverable Name:</b> Implementation Management Plans	<b>Phase:</b> CROSS ALL PHASES
<b>Objective:</b> To provide procedures for project management and managing changes to the project scope, schedule or budget.	
<b>Scope:</b> Customized management plans to reflect Radnor Township's specific project approach. Management plans will document specific project management processes that are agreed upon between Radnor Township and Tyler project manager. As part of project planning, the Tyler project manager will review the SOW and contract with Radnor Township. The management plan will include all information and procedures for all phases of the project.	
<b>Format:</b> Microsoft Word	
<b>Outline:</b>	
<b>Resource Management Plan</b>	
<ul style="list-style-type: none"><li>• Identify Tyler resources on project and specific roles/tasks for the project</li><li>• Identify Radnor Township resources and what meetings/roles/tasks each needs to be included on</li><li>• Determine method for identifying/communicating on-site resources</li></ul>	
<b>Communication Management Plan</b>	
<ul style="list-style-type: none"><li>• Definition of Project Communications</li><li>• Communication Methods</li><li>• Key Stakeholders / Audiences for Each Communication</li><li>• Frequency of Communications</li><li>• Roles and Responsibilities</li></ul>	
<b>Risk Management Plan</b>	
<ul style="list-style-type: none"><li>• Definition of Risks</li><li>• Risk Assessment Methodology</li><li>• Risk Documentation</li></ul>	
<b>Quality/Testing Management Plan</b>	
<ul style="list-style-type: none"><li>• Testing Process</li><li>• Testing Criteria</li><li>• Process for Resolving Testing Issues</li><li>• Quality Review Process / Deliverable Quality Review</li><li>• Overall Project Quality Standards</li></ul>	
<b>Schedule Management Plan</b>	
<ul style="list-style-type: none"><li>• Identify process for making adjustments to schedule</li></ul>	
<b>Change Management Plan</b>	
<ul style="list-style-type: none"><li>• Develop Change Management Strategy</li><li>• Identification of project concerns, risks and issues</li></ul>	



**Deliverable Number: DED-1 (1-1)**

- Determine the types, frequency and delivery of communications
- Identify Radnor Township resources and what meetings/roles/tasks each needs to be included on

***Education Management Plan***

- Software/Hardware
  - How many databases will be utilized?
  - Will we establish a Financials Training environment separate from Payroll?
  - Who will refresh the training database?
  - Will a second server be utilized?
  
- Facilities
  - How many training rooms will be utilized?
  - Where are the training rooms?
  - How many workstations will be in each training room?
  - How many printers will be in each training room?
  - Other training room requirements (white board, phone, etc.)
  - Who will schedule the training room?
  
- Staff
  - How many students per teacher?
  - How many students per workstation?
  - What are the hours of training?
  - Who will be trained on each Munis application?
  - Who will take attendance?
  - Will management be present for each session?
  - Who will train the end-users Munis versus Project Team Leads)?
  
- Schedule
  - Who will determine the exact days for training?
  - Who will notify staff members?
  - How far in advance will the training schedule be built?
  
- Quality Control
  - How will Radnor Township determine if attendees have learned required training outcomes?
  - How will follow up training be administered?

**Radnor Township Role:**

- Attend project planning sessions scheduled by Tyler
- All project team members will participate in the development of these plans.

**Tyler Role:**

- Tyler will lead development of the plans and will have responsibility for documenting all decisions as part of the deliverable.

**Acceptance Criteria:**

- Radnor Township project team has read, understands, and agrees with the procedures and schedules within the Implementation Management Plan

<b>Deliverable Number:</b> DED-1 (1-1)	
<ul style="list-style-type: none"> <li>• The deliverable contains all the components specified in the Outline of this DED and the SOW</li> <li>• The respective Tyler and Radnor Township project team members have resolved all material content and/or quality issues.</li> <li>• The deliverable is free of formatting and spelling errors.</li> </ul>	

<b>Deliverable Number:</b> DED-02 (1-2, 2-2, 3-2, 4-2, 5-2, 6-2)	
<b>Deliverable Name:</b> Project Plan / Schedule	<b>Phase:</b> ALL
<b>Objective:</b> Task list with owners and due dates for successful completion of the project.	
<b>Scope:</b> See SOW Section C.1	
<b>Format:</b> Initially developed and maintained on the Project SharePoint site. Tyler is currently testing the use and integration of MS Project with SharePoint. If the testing is complete and successful during Radnor Township's implementation, Tyler will consider the transition of this deliverable to be in MS Project.	
<b>Outline:</b> The project plan will follow the Tyler Implementation Methodology WBS and contain all WBS tasks, tasks necessary for completion of WBS tasks, deliverables, milestones, review/acceptance periods, and other key project events.	
<b>Radnor Township Role:</b> <ul style="list-style-type: none"> <li>• Review project plan</li> <li>• Contribute information necessary to complete and maintain project plan</li> </ul>	
<b>Tyler Role:</b> <ul style="list-style-type: none"> <li>• Provide initial on-site and remote session schedule to Radnor Township for approval</li> <li>• Create project plan</li> <li>• Post project plan to Project SharePoint site</li> </ul>	
<b>Acceptance Criteria:</b> <ul style="list-style-type: none"> <li>• The Radnor Township signs off on the project plan and schedule</li> <li>• The deliverable contains all the components specified in the Outline of this DED and the SOW</li> <li>• The respective Tyler and Radnor Township project team members have resolved all material content and/or quality issues.</li> <li>• The deliverable is free of formatting and spelling errors.</li> </ul>	

<b>Deliverable Number:</b> DED-03 (1-3, 2-3, 3-3, 4-3, 5-3, 6-3)	
<b>Deliverable Name:</b> User Manuals	<b>Phase:</b> 1,2,3,4,5,6
<b>Objective:</b> Provide documentation on standard Munis functions	
<b>Scope:</b> Comprehensive user manuals for all Tyler modules purchased.	
<b>Format:</b> MS Word	
<b>Outline:</b>	

<b>Deliverable Number:</b> DED-03 (1-3, 2-3, 3-3, 4-3, 5-3, 6-3)	
<ul style="list-style-type: none"> <li>• Overview of module</li> <li>• Detailed description of how to generally complete tasks in Munis</li> <li>• Identification of options, fields, and functions built into the Munis software.</li> </ul>	
<b>Radnor Township Role:</b>	
<ul style="list-style-type: none"> <li>• Review User Materials</li> <li>• Update materials with Radnor Township-specific steps and processes</li> </ul>	
<b>Tyler Role:</b>	
<ul style="list-style-type: none"> <li>• Provide training manuals on SharePoint.</li> </ul>	
<b>Acceptance Criteria:</b>	
<ul style="list-style-type: none"> <li>• The deliverable contains all the components specified in the Outline of this DED and the SOW</li> <li>• The training materials will be updated to reflect current features and functions in the software version that Radnor Township is implementing.</li> <li>• The respective Tyler and Radnor Township project team members have resolved all material content and/or quality issues.</li> <li>• The deliverable is free of formatting and spelling errors.</li> </ul>	

<b>Deliverable Number:</b> DED-04 (1-4, 2-4, 3-4, 4-4, 5-4, 6-4)	
<b>Deliverable Name:</b> Data Conversion Plan	<b>Phase:</b> 1,2,3,4,5,6
<b>Objective:</b> Document conversion option decisions, timelines, tasks and validation methods.	
<b>Scope:</b> All conversions listed in Section A.5 that Radnor Township chooses to convert. As analysis sessions occur, the plan will be updated with scope of conversions, years of history, and fields to convert.	
<b>Format:</b> MS Excel	
<b>Outline:</b>	
<ul style="list-style-type: none"> <li>• Conversion options to be exercised</li> <li>• Conversion options not to be completed, with description of change order action</li> <li>• Timelines for each conversion option</li> <li>• Reports and data validation recommendations</li> </ul>	
<b>Radnor Township Role:</b>	
<ul style="list-style-type: none"> <li>• Attend conversion and applicable module analysis sessions</li> <li>• Participate in planning discussions</li> <li>• Review and accept the conversion plan</li> </ul>	
<b>Tyler Role:</b>	
<ul style="list-style-type: none"> <li>• Provide conversion analysis</li> <li>• Provide conversion specifications and guidelines</li> <li>• Provide guidance on proofing methods and tools</li> <li>• Create and provide the conversion plan</li> </ul>	
<b>Acceptance Criteria:</b>	
<ul style="list-style-type: none"> <li>• The deliverable contains all the components specified in the Outline of this DED and the SOW</li> <li>• The respective Tyler and Radnor Township project team members have resolved all material content and/or quality issues.</li> </ul>	



- Data has been proofed and accepted in a test environment by the Radnor Township.
- The deliverable is free of formatting and spelling errors.

<b>Deliverable Number:</b> DED-05 (1-5, 2-5, 3-5,4-5, 5-5. 6-5)	
<b>Deliverable Name:</b> System Design Document	<b>Phase:</b> 1,2,3,4,5,6
<b>Objective:</b> To document the decisions and processes resulting from analysis and identify how Radnor Township will use the Munis system.	
<b>Scope:</b> Detailed review of each in scope functional area, module, and business process to identify the current needs, business process requirements, business process and Munis configuration decisions, and detailed set-up notes for how Munis will be used. The document is to contain workflow, and security information where applicable.	
<b>Format:</b> MS Word and/or MS Excel	
<p><b>Sample Outline:</b></p> <p><b>Current Needs:</b></p> <ul style="list-style-type: none"> <li>• Identification of current process</li> <li>• Analysis of Munis fit/gap</li> </ul> <p><b>Radnor Township Decision Making:</b></p> <ul style="list-style-type: none"> <li>• Process Decisions</li> <li>• Munis Considerations</li> <li>• Follow Up Items</li> </ul> <p><b>Detailed Munis set-up considerations</b></p> <ul style="list-style-type: none"> <li>• Munis set up details</li> <li>• Modifications</li> <li>• Interfaces</li> </ul> <p><b>Other Information</b></p> <ul style="list-style-type: none"> <li>• Workflow Details</li> <li>• Security Details</li> </ul>	
<p><b>Radnor Township Role:</b></p> <ul style="list-style-type: none"> <li>• Participate in all meetings and make decisions</li> <li>• Review the documents provided by the Tyler project team</li> <li>• Identify any discrepancies</li> <li>• Ask for clarification from the Tyler team, if necessary</li> </ul>	
<p><b>Tyler Role:</b></p> <ul style="list-style-type: none"> <li>• Complete deliverable documenting decisions and Munis details</li> <li>• Post the analysis notes on the Project SharePoint site</li> <li>• Update deliverable based on feedback from the Radnor Township</li> </ul>	
<p><b>Acceptance Criteria:</b></p> <ul style="list-style-type: none"> <li>• The deliverable contains all the components specified in the Outline of this DED</li> <li>• The respective Tyler and Radnor Township project team members have resolved all material</li> </ul>	

- |  |
|--|
| <p>content and/or quality issues.</p> <ul style="list-style-type: none"> <li>• The deliverable is free of formatting and spelling errors.</li> </ul> |
|--|

<b>Deliverable Number:</b> DED-06 (1-6, 2-6, 3-6, 4-6, 5-6, 6-6)	
<b>Deliverable Name:</b> Static Environment Test (SET) Plan	<b>Phase:</b> 1,2,3,4,5,6
<b>Objective:</b> Prepare the test script based on Radnor Township’s process and set up decisions through As Is and To Be analysis.	
<b>Scope:</b> Tyler will lead Radnor Township in the step by step testing of Radnor Township business process decisions built into the functionality of Munis. This test will enable Radnor Township to see the way the system functions using their own data and business processes. Focus will be on helping Radnor Township understand the impact the desired business processes will have on the way the system functions and the impact of the system on Radnor Township business process decisions. The SET Test Plan will contain detailed testing scripts to test Radnor Township business processes.	
<b>Format:</b> MS Word document	
<b>Outline:</b>	
<ul style="list-style-type: none"> <li>• Detailed test scripts by business process for each functional area/module in scope for the project.</li> </ul>	
<b>Radnor Township Role:</b>	
<ul style="list-style-type: none"> <li>• Review the SET plan</li> <li>• Provide feedback for additional processes to be tested</li> </ul>	
<b>Tyler Role:</b>	
<ul style="list-style-type: none"> <li>• Develop SET plan</li> <li>• Modify SET plan prior to testing based on Radnor Township feedback</li> </ul>	
<b>Acceptance Criteria:</b>	
<ul style="list-style-type: none"> <li>• The deliverable contains all the components specified in the Outline of this DED and the SOW</li> <li>• The respective Tyler and Radnor Township project team members have resolved all material content and/or quality issues.</li> <li>• The deliverable is free of formatting and spelling errors.</li> </ul>	

<b>Deliverable Number:</b> DED-07 (1-7, 2-7, 3-7,4-7, 5-7, 6-7)	
<b>Deliverable Name:</b> Program Modification / Interface Design Specifications	<b>Phase:</b> 1,2,3,4,5,6 (if applicable)
<b>Objective:</b> Review and understand Radnor Township requirements for the customizations and interfaces. Specification will contain a description and details of the intended program modifications and custom interfaces to be delivered to address the contract item – this document identifies exactly where and how the application programs will be changed.	
<b>Scope:</b> Any Program Modifications and Interfaces added to the scope via an approved Scope Change.	
<b>Format:</b> Word document to detail design specifications	
<b>Outline:</b>	
Word document provided by Development that will describe the proposed functionality desired by	

<b>Deliverable Number: DED-07 (1-7, 2-7, 3-7,4-7, 5-7, 6-7)</b>	
Radnor Township.	
<b>Radnor Township Role:</b>	
<ul style="list-style-type: none"> <li>• Radnor Township provides business practices and/or mandates that drive the need for the modification.</li> <li>• Radnor Township reviews the design specification with Development and Implementation.</li> <li>• Radnor Township signs off on final design specification.</li> </ul>	
<b>Tyler Role:</b>	
<ul style="list-style-type: none"> <li>• Development obtains Radnor Township’s business practices and/or mandates that drive the need for the modification.</li> <li>• Development may suggest existing functionality to achieve the desired results. Implementation will provide relevant details for the Radnor Township’s suggested future Munis business practices.</li> <li>• Development creates the design specification for the modification.</li> <li>• Development and Implementation review the design specification with the Radnor Township.</li> <li>• Development updates the design specification with any requested changes, if applicable.</li> <li>• Implementation PM makes adjustments to the modification task dates in the project plan, as necessary.</li> <li>• Development obtains Radnor Township sign-off of the design specifications.</li> <li>• Modify specifications if required after development of modification.</li> </ul>	
<b>Acceptance Criteria:</b>	
<ul style="list-style-type: none"> <li>• The deliverable contains all the components specified in the Outline of this DED</li> <li>• The respective Tyler and Radnor Township project team members have resolved all material content and/or quality issues.</li> <li>• The deliverable is free of formatting and spelling errors.</li> </ul>	

<b>Deliverable Number: DED-08 (1-8, 2-8, 3-8,4-8, 5-8, 6-8)</b>	
<b>Deliverable Name:</b> Pre-Live Checklist	<b>Phase:</b> 1,2,3,4,5,6
<b>Objective:</b> Identify all tasks that will need to be completed for Go-live. Checklist will provide cutover timelines to cease processing in the legacy system, timeline for final conversions, contingency processing plans and instructions for decentralized departments.	
<b>Scope:</b> Implementation will provide the Radnor Township with a checklist of items needed to be completed for Go-Live	
<b>Format:</b> MS Excel	
<b>Outline:</b>	
Sample activities from a Payroll Go-Live Checklist:	
<ul style="list-style-type: none"> <li>• Separation of duties between Payroll and HR determined and tested</li> <li>• Validate process of starting a payroll, switch T &amp; A users</li> <li>• Review Dept. Time &amp; Attendance process, proof reports</li> <li>• Verify GL Distribution Posting correctly- Finance Dept. approval</li> </ul>	



<b>Deliverable Number:</b> DED-08 (1-8, 2-8, 3-8,4-8, 5-8, 6-8)	
<ul style="list-style-type: none"> <li>Verify appropriate permission levels on General, Time &amp; Attendance and Payroll Run Processing for all users</li> </ul> <p>Checklist columns:</p> <ul style="list-style-type: none"> <li>Item ID</li> <li>Activity</li> <li>Owner</li> <li>Date Verified</li> <li>Radnor Township Approval (initials)</li> <li>Notes/Comments</li> </ul>	
<b>Radnor Township Role:</b>	
<ul style="list-style-type: none"> <li>Review and complete the list of items required for go-live.</li> </ul>	
<b>Tyler Role:</b>	
<ul style="list-style-type: none"> <li>Provide Radnor Township with a list of items required for completion for the go-live, by phase.</li> </ul>	
<b>Acceptance Criteria:</b>	
<ul style="list-style-type: none"> <li>The deliverable contains all the components specified in the Outline of this DED and the SOW</li> <li>The respective Tyler and Radnor Township project team members have resolved all material content and/or quality issues.</li> <li>The deliverable is free of formatting and spelling errors.</li> </ul>	

<b>Deliverable Number:</b> DED-09 (1-9, 2-9, 3-9, 4-9, 5-9, 6-9)	
<b>Deliverable Name:</b> Lessons Learned Document	<b>Phase:</b> 1,2,3,4,5,6
<b>Objective:</b> Document lessons learned to apply to future phases/projects	
<b>Scope:</b> All lessons learned specific to Munis implementation	
<b>Format:</b> MS Excel	
<b>Outline:</b>	
<ul style="list-style-type: none"> <li>ID</li> <li>Date</li> <li>Title</li> <li>Phase</li> <li>Lesson Value</li> <li>Description and Impact</li> <li>Recommendation(s)</li> <li>Contact</li> </ul>	
<b>Radnor Township Role:</b>	
<ul style="list-style-type: none"> <li>Gather feedback</li> <li>Participate in lessons learned session</li> <li>Document and archive lessons learned</li> </ul>	
<b>Tyler Role:</b>	

**Deliverable Number: DED-09 (1-9, 2-9, 3-9, 4-9, 5-9, 6-9)**

- Lead lessons learned session
- Archive lessons learned

**Acceptance Criteria:**

- The deliverable contains all the components specified in the Outline of this DED and the SOW
- The respective Tyler and Radnor Township project team members have resolved all material content and/or quality issues.
- The deliverable is free of formatting and spelling errors.

# CERTIFICATE OF APPROPRIATENESS

Radnor Township Historical and Architectural Review Board  
Radnor Township, Pennsylvania



**NAME OF OWNER:** ARNOLD KARA HANLON  
**OWNER ADDRESS:** 401 MIDLAND AVENUE, WAYNE, PA 19087  
**ADDRESS OF PROPERTY:** 401 MIDLAND AV , WAYNE PA 19087  
**APPLICATION NUMBER:** HARB-2016-06

Subject to the conditions below the above owner, having complied with the Radnor Township Historical and Architectural Review Board (HARB) process, is hereby granted this permit for the

**Removal of non-original addition at rear of house. Replace with proposed addition presented in drawings. New addition includes two car garage, laundry room and sunroom on first floor and a children's playroom on the second.**

at the address specified and may proceed with the building permit process. If not completed within one year of the date hereof, this permit is void and new application must be made. This Approval is subject to the Applicant applying for and receiving all necessary permits and approvals; and complying with all applicable Municipal regulations. Owner specifically gives the building inspector or designated official the right to inspect the work during progress and at completion.

## NOTES AND/OR CONDITIONS OF APPROVAL:

Approved as submitted

**ISSUED:** Monday, May 09, 2016

**TOWNSHIP OFFICIAL**

**ACCEPTED BY APPLICANT**

\_\_\_\_\_  
Philip M. Ahr, President



# CERTIFICATE OF APPROPRIATENESS

Radnor Township Historical and Architectural Review Board  
Radnor Township, Pennsylvania



**NAME OF OWNER:** KOCHAR ARVIND K & AJAY S  
**OWNER ADDRESS:** 6919 AMBER LA, CARLSBAD, CA 92009  
**ADDRESS OF PROPERTY:** 414 RADNOR STREET RD , WAYNE PA 19087  
**APPLICATION NUMBER:** HARB-2016-07

Subject to the conditions below the above owner, having complied with the Radnor Township Historical and Architectural Review Board (HARB) process, is hereby granted this permit for the

**Small addition to the back of their center hall colonial and a new garage.**

at the address specified and may proceed with the building permit process. If not completed within one year of the date hereof, this permit is void and new application must be made. This Approval is subject to the Applicant applying for and receiving all necessary permits and approvals; and complying with all applicable Municipal regulations. Owner specifically gives the building inspector or designated official the right to inspect the work during progress and at completion.

**NOTES AND/OR CONDITIONS OF APPROVAL:**

Approved as submitted

**ISSUED:** Monday, May 09, 2016

**TOWNSHIP OFFICIAL**

**ACCEPTED BY APPLICANT**

\_\_\_\_\_  
Philip M. Ahr, President

# CERTIFICATE OF APPROPRIATENESS

Radnor Township Historical and Architectural Review Board  
Radnor Township, Pennsylvania



**NAME OF OWNER:** ONEIL MICHAEL & JEANNIE  
**OWNER ADDRESS:** 19 LOUELLA CT, WAYNE, PA 19087  
**ADDRESS OF PROPERTY:** 19 LOUELLA CT , WAYNE PA 19087  
**APPLICATION NUMBER:** HARB-2016-08

Subject to the conditions below the above owner, having complied with the Radnor Township Historical and Architectural Review Board (HARB) process, is hereby granted this permit for the

**New construction of a partially underground garage with a concrete structure, overhead garage doors, electric utilities and gas utilities.**

at the address specified and may proceed with the building permit process. If not completed within one year of the date hereof, this permit is void and new application must be made. This Approval is subject to the Applicant applying for and receiving all necessary permits and approvals; and complying with all applicable Municipal regulations. Owner specifically gives the building inspector or designated official the right to inspect the work during progress and at completion.

## NOTES AND/OR CONDITIONS OF APPROVAL:

Approved as submitted

**ISSUED:** Monday, May 09, 2016

**TOWNSHIP OFFICIAL**

**ACCEPTED BY APPLICANT**

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Philip M. Ahr, President

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## MEMORANDUM

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**TO:** BOARD OF COMMISSIONERS  
**FROM:** KEVIN W. KOCHANSKI, DIRECTOR  
**SUBJECT:** HARB 2016-04  
**DATE:** MAY 5, 2016  
**CC:** ROBERT A. ZIENKOWSKI, MANAGER



Community  
Development  
Department

The Radnor Township Historical Architectural Review Board at their regularly scheduled meeting on May 4, 2016 recommended denial of HARB #2016-04 in a vote of **4-0**. Their concerns were based on the following:

*The Historic and Architectural Review Board wants this property rehabilitated, therefore, a motion was made to deny the issuance of the Certificate of Appropriateness for the demolition of this property.*

In accordance with Chapter 178-8.G, the Board of Commissioners shall either:

1. Approve or deny the certificate of appropriateness consistent with action taken by the HARB in connection with building and/or demolition.
2. Approve the application and authorize a certificate of appropriateness with modifications to the HARB recommendation.
3. Reverse the recommendation of the HARB.



### ZONING HEARING BOARD APPLICATION

#### TOWNSHIP OF RADNOR

301 IVEN AVENUE

WAYNE, PA 19087

610-688-5600

FAX: 610-971-0450

www.radnor.com

www.radnor.com

<b>TOWNSHIP USE ONLY</b>	
APPEAL #	<u>2968</u>
FEE:	<u>900</u>
DATE RECEIVED:	<u>4/19/16</u>

**GENERAL INFORMATION:** Applicants are strongly encouraged to review the "Requirements and Information for Appeals to the Zoning Hearing Board" that are attached to the application. Ten (10) copies of this application and required attachments along with an electronic submittal in pdf format (CD or thumb drive) must be filed with the Community Development Department not less than thirty (30) calendar days prior to the hearing. *Incomplete applications will not be accepted for processing.*

**REQUIRED FEE DUE AT FILING:** Please refer to the Consolidated Fee Schedule, as amended on our website at [www.radnor.com](http://www.radnor.com) for a copy of our current fees.

\*\*\*\*\*

*TYPE OR PRINT*

Property Address: 800 Lancaster Avenue

Name and address of Applicant: Villanova University  
800 Lancaster Avenue, Villanova, PA, 19085

Telephone Number: 610-519-6920 Email: marilou.smith@villanova.edu

Property Owner (if different than above): same as above

Owner address: \_\_\_\_\_

Telephone number: \_\_\_\_\_ Email: \_\_\_\_\_

Attorney's name: Nicholas J. Caniglia, Esquire

Address: 125 Strafford Ave., Suite 110, Wayne, PA 19087

Telephone number: 610-688-2626 Email: Nick@piercecانigliaataylor.com

**Relief requested and/or basis for appearing before the Zoning Hearing Board including *specific citation to any and all sections of the Zoning Code relevant to the appeal. (attach additional pages if necessary)***

Applicant seeks a variance from Section 280-68.1D.(3)(g) of the Zoning Code regarding "Dark-Sky" full-cutoff requirements. Applicant proposes fixtures which remain consistent with the balance of campus. The proposed fixture maintains a downlight (at or below horizontal) percentage of 99.0% or greater versus the 100% downlight requirement of the Dark Sky fixture. The traditionally shaped Sternberg Main Street fixture proposed by Applicant cannot meet this Dark Sky requirement. Applicant further contends that the relief is de minimis.

Witness List: See Attached

**Description of previous decisions by the Zoning Hearing Board pertinent to the property, or attach copies of decisions: *(attach additional pages if necessary)***

None

**VILLANOVA UNIVERSITY**

**List of Witnesses and Summary of Testimony**

John H. Cluver, AIA, LEED AP  
Voith & Mactavish Architects, LLP  
Project Architect

Testimony related to overall project design and campus aesthetic.

John O'Donohoe, LEED AP BD+C  
O'Donohoe & Rose Lighting LLC  
Lighting Designer

Testimony related to comparative lighting distribution.

Marilou Smith, LEED AP  
Villanova University  
Sr. Project Manager

Testimony related to current campus light fixtures.



**Brief narrative of improvements: (attach additional pages if necessary)**

The Zoning Code requires Dark Sky compliant cutoff fixtures for the Planned Institutional CICD zoning district. Dark Sky provides for a 100% downlight. Applicant proposes the Stenberg Main Street fixture versus the Lumec MetroScape in the approved Land Development submission (See A8 for photos). The Main Street fixture has downlight of 99.0% or higher (see A7 for comparison).

**ATTACHMENTS: Ten (10) copies of each and one (1) electronic copy in pdf format (CD or thumb drive) of the following must be provided:**

1. **Engineered plan or survey of the property drawn to scale, prepared by a registered architect, engineer or surveyor licensed in Pennsylvania, containing the following information:**
  - a) lot lines and lot dimensions described in metes and bounds (in feet);
  - b) total lot area;
  - c) location of easements and rights of way, including ultimate rights of way;
  - d) location of all setback lines for existing and proposed structures;
  - e) location of steep slopes, floodplains, riparian buffers, wetlands, and other pertinent features;
  - f) location of existing and proposed improvements;
  - g) table of zoning data including zoning district, required setbacks, existing and proposed building coverage, impervious coverage, height, and other pertinent zoning restrictions, and any degree of compliance or noncompliance; and
  - h) all other features or matters pertinent to the application.

**PLANS SHALL NOT EXCEED 24" X 36" , AND MUST BE NEATLY FOLDED TO NO GREATER DIMENSION THAN 8 ½" X 11" AT FILING**

2. **List of witnesses and summary of their testimony attached.**
3. **Photographs of the property at issue and all adjoining properties.**
4. **Copies of any written professional reports, including traffic studies, land planning studies,**

appraisals, floodplain analyses, economic forecasts or other written reports, which the applicant wishes to present at the hearing (*note: the author of the study or a qualified representative of the entity who prepared the study must appear at the meeting and be available for cross-examination*).

5. Copy of deed, lease, agreement of sale, or other authorization to file the appeal. (*note: leases or agreements of sale either must expressly permit the tenant or buyer to file an appeal, or must be accompanied by a by a letter from the owner clearly authorizing tenant or buyer to file the appeal*).

#### ADDITIONAL REQUIREMENTS

1. Will this application involve the subdivision of land? Applications that involve the subdivision of land are referred to the Planning Commission for review and recommendation. *Applicants will be notified of the date and time of the Planning Commission meeting*
2. Will briefs or memoranda of law be filed in accordance with requirements of the Zoning Hearing Board? (*note – 10 copies of any brief or memorandum of law to be submitted by the applicant must be received by the Community Development Department no later than 14 days before the hearing*).
3. Will the applicant (or duly authorized officer of the applicant, if applicant is not a natural person) be present at the hearing. If not, then power of attorney, notarized and in recordable form, authorizing the person who will testify on behalf of the applicant, and to bind the applicant in any proceedings of the Board must be presented at or before commencement of the hearing. Attorneys, agents, or other representatives of the applicant may not appear and testify on behalf of the applicant without power of attorney. Forms of power of attorney are available in the Community Development Department. (*note: failure to provide power of attorney will result either in the appeal being continued, or being dismissed, at the discretion of the Board*).

  
SIGNATURE OF APPLICANT

AN ADDITIONAL FEE OF \$200 SHALL BE CHARGED FOR ANY CONTINUANCE REQUESTED BY THE APPLICANT. THIS FEE SHALL BE PAID PRIOR TO THE RESCHEDULING OF THE HEARING.

**RESOLUTION NO. 2016-61**

**A RESOLUTION OF RADNOR TOWNSHIP, DELAWARE  
COUNTY, PENNSYLVANIA, AUTHORIZING GILMORE &  
ASSOCIATES TO PREPARE DESIGN AND BIDDING  
DOCUMENTS FOR PINE TREE ROAD TRAFFIC  
CALMING MEDIANS**

*WHEREAS*, The Township wishes to reduce vehicular speeds on Pine Tree Road, via traffic calming methods

*WHEREAS*, Gilmore and Associates, the Township's appointed Traffic Engineer has provided a Not To Exceed cost proposal of \$12,800 to provide survey, design, construction drawings, and bidding documents for medians and associated work on Pine Tree Road

*NOW, THEREFORE*, be it *RESOLVED* by the Board of Commissioners of Radnor Township does hereby authorize Gilmore & Associates to Prepare Design and Bidding Documents for Pine Tree Road Traffic Calming Medians for the not to exceed cost of \$12,800.

*SO RESOLVED* this 9<sup>th</sup> day of May, A.D., 2016

**RADNOR TOWNSHIP**

By: \_\_\_\_\_

Name: Philip M. Ahr

Title: President

ATTEST:

\_\_\_\_\_  
Robert A. Zienkowski  
Manager/Secretary



**Radnor Township**  
**PROPOSED LEGISLATION**

DATE: May 2, 2016

TO: Radnor Township Board of Commissioners

FROM: Stephen F. Norcini, P.E., Director of Public Works *SN*

CC: Robert A. Zienkowski, Township Manager  
William M. White, Finance Director

LEGISLATION: **Resolution #2016- 61: Authorizing Gilmore and Associates to Prepare Design and Bidding Documents for Pine Tree Road Traffic Calming Medians**

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LEGISLATIVE HISTORY: At the regularly scheduled Board of Commissioners meeting on April 25th, the Board of Commissioners directed staff to have Gilmore & Associates submit a cost proposal for survey, design, and bidding documents for the installation of traffic calming medians on Pine Tree Road.

PURPOSE AND EXPLANATION: This project entails the installation of four medians, each fifty feet in length, from the intersection of Pine Tree Road and King of Prussia Road to the intersection of Pine Tree Road and Cricket Lane. Along with the concrete medians are painted medians and single white lines on the shoulders. The medians and shoulder striping are to reduce lane width, with the intent to slow vehicle's speed (traffic calming). I have enclosed a copy of the March 28<sup>th</sup> Gilmore and Associates Pine Tree Road Traffic Calming Improvement presentation, the Gilmore and Associates cost proposal, and page 25 of the Pennsylvania Department of Transportation Traffic Calming Handbook, Figure 3: "Effects of Traffic Calming Measures".

IMPLEMENTATION SCHEDULE: The Gilmore and Associates cost proposal for survey, design, and bidding documents is \$12,800. Their estimated cost of construction is \$23,000, for a total project cost of \$35,800. Pending Board of Commissioners approval, a purchase order request will be submitted immediately for Gilmore to proceed with the design portion of the project. As a follow up to this requested resolution, there is a motion in front of the Board of Commissioners to authorize the Engineering Department to receive sealed bids for the aforementioned medians.

FISCAL IMPACT: The cost of project would be funded from the capital fund.

RECOMMENDED ACTION: *I respectfully request the Board of Commissioners move Resolution #2016- 61: Authorizing Gilmore and Associates to Prepare Design and Bidding Documents for Pine Tree Road Traffic Calming Medians.*

Enclosures: Gilmore & Associates Cost Proposal  
Gilmore & Associates March 28, 2016 presentation  
Pennsylvania Department of Transportation Traffic Calming Handbook, page 23

# Pine Tree Road Traffic Calming Improvements

*March 28, 2016*

*Located in*  
**Radnor Township, Delaware County**



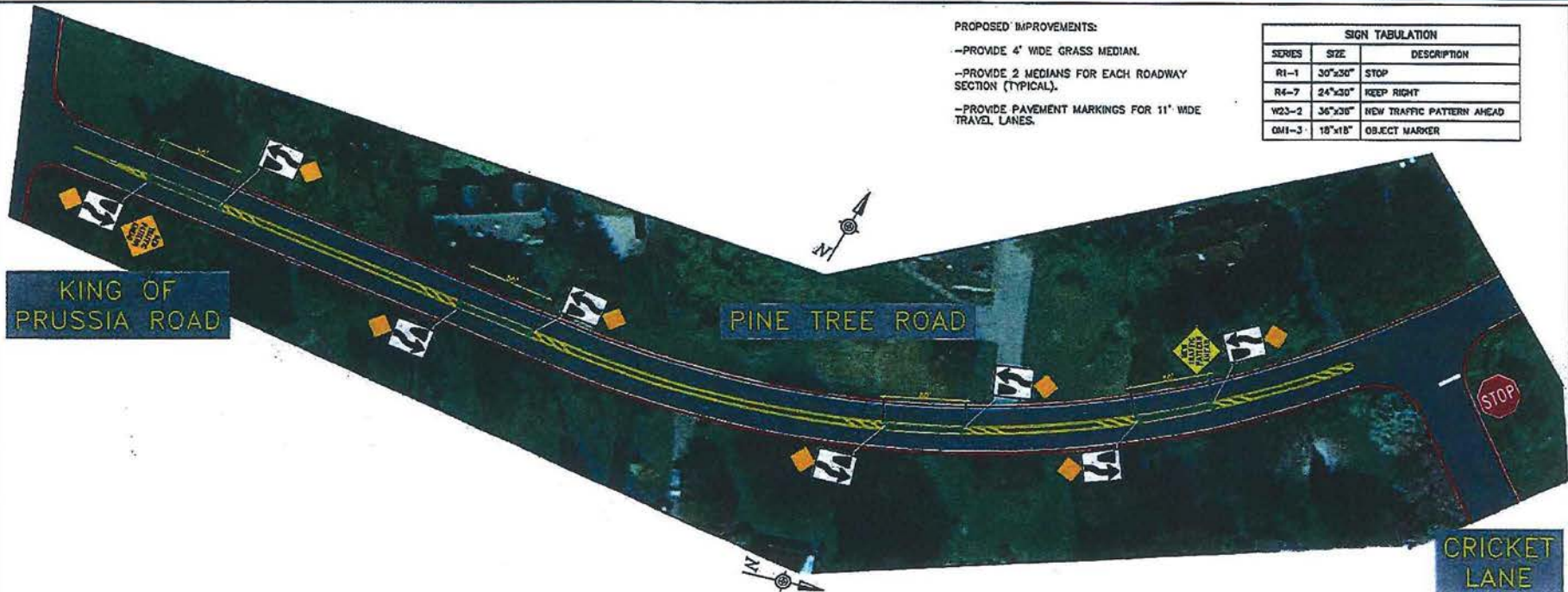
Prepared by Gilmore & Associates, Inc.

# Median

**PROPOSED IMPROVEMENTS:**

- PROVIDE 4' WIDE GRASS MEDIAN.
- PROVIDE 2 MEDIANS FOR EACH ROADWAY SECTION (TYPICAL).
- PROVIDE PAVEMENT MARKINGS FOR 11' WIDE TRAVEL LANES.

SIGN TABULATION		
SERIES	SIZE	DESCRIPTION
R1-1	30"x30"	STOP
R4-7	24"x30"	KEEP RIGHT
W23-2	36"x30"	NEW TRAFFIC PATTERN AHEAD
OM1-3	18"x18"	OBJECT MARKER



- King of Prussia Road to Cricket Lane = 880'
- Construct 4 - 50' Medians as indicated
- Avoid installation within 20' of residential driveways

**MEDIAN COST**  
 \$15,000 PER MEDIAN  
 4 MEDIANS TOTAL = \$60,000

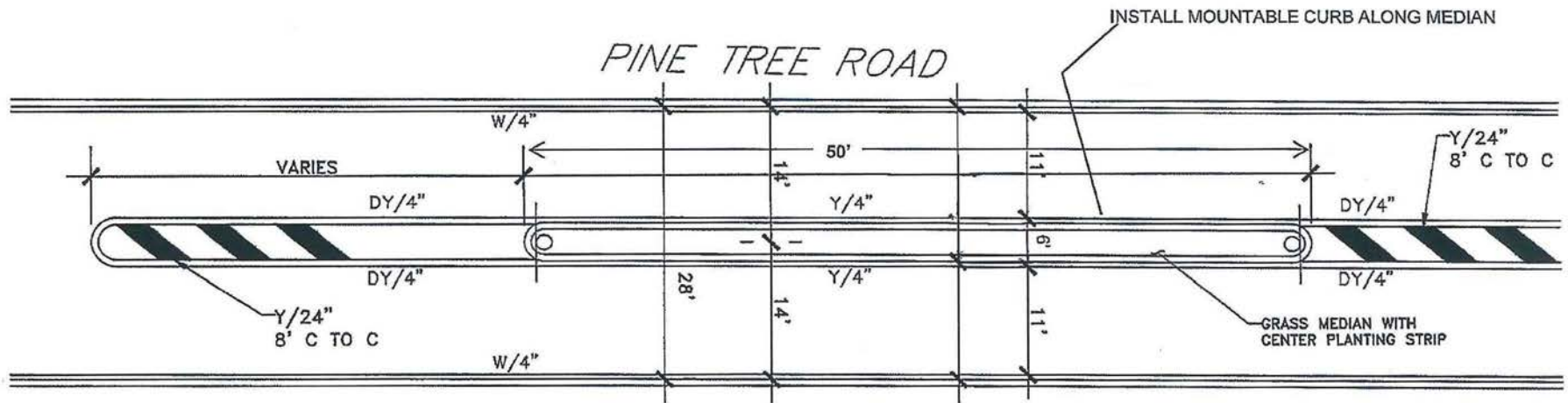
INCLUDE NATIVE LOW-PROFILE DROUGHT RESISTANT PLANTINGS  
 ASSUMES CONSTRUCTION BY RADNOR TOWNSHIP PUBLIC WORKS

ONLY THOSE PLANS REPRESENTING THE REGISTERED PROFESSIONAL SEAL SHOULD BE CONSIDERED OFFICIAL, AND RELEASD UPON BY USER. THIS PLAN IS PREPARED SPECIFICALLY FOR THE CLIENT AND PROJECT DESCRIBED HEREIN. NO GUARANTEE, REPRESENTATION, OR WARRANTY IS MADE WITHOUT THE CONSENT OF GILMORE & ASSOCIATES, INC. IS REQUESTED. COPYRIGHT 2015 GILMORE & ASSOCIATES, INC. ALL RIGHTS RESERVED.

REV.	FOR TOWNSHIP COMMENTS	4/28/15	HEB
TAX MAP PARCEL NO.	DESCRIPTION	DATE	BY
N/A	CONCEPTUAL PLAN TRAFFIC CALMING MEDIAN ISLANDS PINE TREE ROAD		
TOTAL AREA	TOTAL LOTS	BUSHOR TOWNSHIP, DELAWARE COUNTY, PENNSYLVANIA	
N/A	N/A	GILMORE & ASSOCIATES, INC. ENGINEERING & CONSULTING SERVICES	
DATE	SCALE	At 100% unless noted. All dimensions are in feet unless otherwise noted.	
10/28/14	1"=30'	JOB NO. 2015-05007	
		SHEET NO. 1 OF 10	
DESIGNED BY	DRAWN BY	CHECKED BY	
BAO	BAO	JMK	



# Median Detail



TRAFFIC MEDIAN DETAIL

1"=5'



TRAFFIC MEDIAN PLANTING DETAIL

SOURCE: GOOGLE STREET VIEW

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NO.	DESCRIPTION	DATE	BY
TAX MAP PARCEL NO.	N/A		
TOTAL AREA	TOTAL USED		
N/A	N/A		
DATE	SCALE		
10/21/14	1"=4'		
CONCEPTUAL PLAN TRAFFIC CALMING MEDIAN ISLANDS PINE TREE ROAD KADDER TOWNSHIP, SULLYVILLE COUNTY, PENNSYLVANIA			
<b>GILMORE &amp; ASSOCIATES, INC.</b> ENGINEERING & CONSULTING SERVICES			
		JOB NO.	2015-05007
0 5 10 FEET		SHEET NO.	3 OF 10
DESIGNED BY	DRAWN BY	CHECKED BY	
BAO	BAO	ABC	



**GILMORE & ASSOCIATES, INC.**  
ENGINEERING & CONSULTING SERVICES

April 28, 2016

Project No. 15-05007.01

Mr. Stephen F. Norcini, P.E.  
Director of Public Works  
Radnor Township  
301 Iven Avenue  
Wayne, PA 19087-5297

Reference: Professional Services Agreement  
Pine Tree Road Median Design Services  
Radnor Township, Delaware County, Pennsylvania

Dear Mr. Norcini:

Per your request, Gilmore & Associates, Inc. (G&A) will provide traffic engineering services for the design of the proposed traffic calming median along Pine Tree Road from King of Prussia Road to Cricket Lane. These improvements are anticipated to include four 20' long 6' wide vegetated medians bordered in concrete mountable curb to be distributed over the 880' stretch of road as well as related signing and striping. No stormwater design is anticipated or included in this scope.

Traffic Engineering Services include the following items:

I. Survey

- A. Obtain survey measurements and create a base plan sufficient for the design of the project. This survey is to include:
1. 50' cross sections of the roadway to include roadway crown, striping, edge of pavement and curbing. Sections to extend to 5' beyond the edge of the roadway.
  2. Additional features are to be obtained within the limits stated above such as surface utilities, driveways, and signs.
  3. It is assumed due to the minimal scope of this work that GIS line-work for Right-of-Way will be sufficient and available.

II. Design

- A. Prepare plans sufficient for construction of the proposed median, striping, and striping. Plans are to include the necessary details and construction references, and traffic control plan. This task includes one set of revisions based on Township comments.

BUILDING ON A FOUNDATION OF EXCELLENCE

65 E. Butler Avenue | Suite 100 | New Britain, PA 18901  
Phone: 215-345-4330 | Fax: 215-345-8606  
[www.gilmore-assoc.com](http://www.gilmore-assoc.com)

- B. Incorporate planting schedule provided by Radnor Township into the plans and estimate.
- C. Prepare an Engineer's Opinion of Probable Cost for the proposed improvements and alternates.

III. Bid Documents

- A. Prepare the technical specifications for the proposed construction.
- B. Prepare an Advertisement For Bids.
- C. Create complete bid document utilizing front sections provided by Radnor Township. Bid is to contain Alternates for median fill and topsoil, plantings, and striping.

IV. Meetings

- A. Attend two meetings.
  - 1. One Staff meeting to review the project with Township Staff
  - 2. One public meeting to present the project to the public.

Gilmore & Associates, Inc. shall provide the services outlined above, **for a not-to-exceed fee of \$12,800** subject to the following conditions:

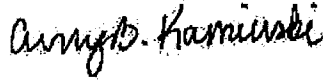
- A. Fees are based on acceptance of this contract agreement within the next 30 days. Gilmore & Associates, Inc. reserves the right to adjust the cost of these services in accordance with increases in company billing rates if this Contract Agreement is not accepted within 30 days. The fees assume the completion of all professional services within 12 months from the date of contract execution. In the event the professional services are not completed within 12 months from the date of Contract Agreement execution, Gilmore & Associates, Inc. reserves the right to adjust the cost of the remaining services in accordance with increases in company billing rates.
- B. Method of Payment - Invoices shall be submitted on a monthly basis and are due upon receipt. Payment is due upon presentation of an invoice and is past due thirty (30) days from invoice date. Client will be assessed a service charge of one and one-half (1-1/2) percent per month (18% per annum) or a fraction thereof on past due payments.
- C. No drainage improvements or impacts are anticipated and as such are not included in this scope and estimate.
- D. Construction inspection is not included in the scope of this work but may be provided as an additional service.

Should you find this contract agreement acceptable, please sign below and return the original to me as authorization to proceed.

Thank you for your continued consideration of Gilmore & Associates, Inc. We look forward to the successful completion of this project in Radnor Township. In the meantime, please do not hesitate to contact me with any questions or comments you may have.



Sincerely,



Amy B. Kaminski, P.E., PTOE  
Transportation Services Manager  
Gilmore & Associates, Inc.  
[akaminski@gilmore-assoc.com](mailto:akaminski@gilmore-assoc.com)

Authorization to proceed:

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Purchase Order Number

Figure 3 depicts the effectiveness of each traffic calming measure in addressing volume and speeding problems. The actual effectiveness of any traffic calming device is unique to the application and the location. However many municipalities are interested in the potential reductions in speed and volume for various devices prior to implementation. Appendix D provides case studies that provide actual data on the expected impacts. In addition the aforementioned ITE reference provides additional data on the effectiveness of devices. The effects on traffic conflicts (between vehicles and pedestrians, bicyclists, and other vehicles) and emergency services are also summarized.

**FIGURE 3  
EFFECTS OF TRAFFIC CALMING MEASURES**

	Volume Reduction	Speed Reduction	Conflict Reduction	Emergency Response
<b>Horizontal Deflection</b>				
Bulb-out / curb extension	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chicane	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gateway	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On-street parking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Raised median island / pedestrian refuge	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Traffic circle	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Vertical Deflection</b>				
Speed hump	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Speed Cushion	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Raised crosswalk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Raised intersection	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Physical Obstruction</b>				
Semi-diverter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Diagonal diverter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Right-in / right-out island	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Raised median through intersection	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Street closure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Signing and Pavement Markings</b>				
Speed limit signing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-way stop control	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Turn prohibitions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
One-way streets	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Commercial vehicle prohibitions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roadway narrowing with edge lines	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transverse markings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


- Minimal or no effect
- Moderate effect
- Significant effect

The following information provides a description of each measure, its usage, and its effect on speeds and traffic volumes. The advantages of each measure, disadvantages, cost, and other considerations are also presented. The majority of traffic calming measures used today do not have specific design criteria. For this reason, each jurisdiction across the country has modified measures to suit their particular

**Radnor Township**  
**PROPOSED MOTION**

DATE: May 2, 2016

TO: Radnor Township Board of Commissioners

FROM: Stephen F. Norcini, P.E., Director of Public Works 

CC: Robert A. Zienkowski, Township Manager  
William M. White, Finance Director

LEGISLATION: **Motion: Authorizing the Engineering Department to Receive Sealed Bids for Pine Tree Road Traffic Calming Medians**

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Background: Pending the Board of Commissioners moving of Resolution #2016- 61: Authorizing Gilmore and Associates to Prepare Design and Bidding Documents for Pine Tree Road Traffic Calming Medians, *I respectfully request the Board of Commissioners authorize the Engineering Department to Receive Sealed Bids for Pine Tree Road Traffic Calming Medians.* As noted in the previous memorandum, the estimated cost of construction is \$23,000, to be funded from the capital fund.



# Public Participation

**ORDINANCE NO. 2016-06**

**AN ORDINANCE OF RADNOR TOWNSHIP, DELAWARE COUNTY,  
PENNSYLVANIA, AMENDING THE CODE OF THE TOWNSHIP OF  
RADNOR, CHAPTER 270, VEHICLES AND TRAFFIC, SECTION  
270-30, TIME LIMIT PARKING.**

The Board of Commissioners of the Township of Radnor does hereby ENACT and ORDAIN the following amendments to Chapter 270-30 as follows:

**Section 1.** Section 270-30, Parking Requirements of the Code of the Township of Radnor is hereby amended by rescinding the following parking requirements:

<b>Name of Street</b>	<b>Side</b>	<b>Hours</b>	<b>Location</b>
[Glenbrook Avenue	South	2 Hour Parking 8:00 AM - 6:00 PM Except Saturday, Sunday & Holidays	From Beatrice Drive in a westerly direction to a point of 160 feet past the curb line of Charles Drive]

**Section 2.** Repealer. All ordinances or parts of ordinances which are inconsistent herewith are hereby repealed.

**Section 3.** Severability. If any section, paragraph, subsection, clause or provision of this Ordinance shall be declared invalid or unconstitutional by a court of competent jurisdiction, such decision shall not affect the validity of this Ordinance as a whole or any part thereof other than that portion specifically declared invalid.

**Section 4.** Effective Date. This Ordinance shall become effective in accordance with the Home Rule Charter of Radnor Township.

ENACTED and ORDAINED this        day of        2016.

RADNOR TOWNSHIP

By: \_\_\_\_\_  
Name: Philip Ahr  
Title: President

Attest: \_\_\_\_\_  
Robert A. Zienkowski, Secretary

[    ] Delete

\_\_\_\_\_ Add

# Radnor Township

## PROPOSED LEGISLATION

**Date:** May 2, 2016

**TO:** Robert A. Zienkowski, Township Manager

**FROM:** William A. Colarulo, Police Superintendent

**LEGISLATION:** Ordinance 2016-06 is amending the 2 hour parking, 8:00 AM - 6:00 PM, except Saturday, Sunday & Holidays on the south side of Glenbrook Avenue.

**LEGISLATION HISTORY:** None.

**PURPOSE AND EXPLANATION:** This item was overlooked during the Traffic Codification, Ordinance 2013-16 dated August 12, 2013.

**FISCAL IMPACT:** None.

**RECOMMENDED ACTION:** The Police Department respectfully requests the Board of Commissioners to adopt the amendment at the regular Board of Commissioners meeting on May , 2016.



**ORDINANCE 2016-07**

**AN ORDINANCE OF RADNOR TOWNSHIP, DELAWARE COUNTY, PENNSYLVANIA, AMENDING THE CODE OF THE TOWNSHIP OF RADNOR, SECTION 270-13, ONE-WAY STREETS, SECTION 270-16 STOP INTERSECTIONS AND SECTION 270-28, PARKING PROHIBITED ON MEREDITH AVENUE.**

**The Board of Commissioners of the Township of Radnor does hereby ENACT and ORDAIN the following amendments to Chapters 270-13 as follows:**

Section 1. Section 270-13 One-way streets, of the Code of the Township of Radnor is hereby amended as follows:

<b>Stop Sign On:</b>	<b>Direction of Travel:</b>	<b>At Intersection of:</b>
<b>Meredith Avenue</b>	<b>Northwest</b>	<b>From Conestoga Road to Eachus Avenue</b>

Section 2. Section 270-16 Stop Intersections, of the Code of the Township of Radnor is hereby amended as follows:

<b>[Meredith Avenue</b>	<b>South</b>	<b>Conestoga Road]</b>
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Section 3. Section 270-28, Parking Prohibited at all times, of the Code of the Township of Radnor is hereby amended as follows:

<b>Name of Street</b>	<b>Side</b>	<b>Location</b>
<b>[Meredith Avenue</b>	<b>Northwest</b>	<b>At the curve of Meredith Avenue, 70 feet north of Conestoga Road and 93 feet north of Conestoga Road, covering an area of 23 feet]</b>

Section 4: Repealer. All ordinances or parts of ordinances which are inconsistent herewith are hereby repealed.

Section 5: Severability. If any section, paragraph, subsection, clause or provision of this Ordinance shall be declared invalid or unconstitutional by a court of competent jurisdiction, such decision shall not affect the validity of this Ordinance as a whole or any part thereof other than that portion specifically declared invalid.

Section 6: Effective Date. This Ordinance shall become effective in accordance with the Home Rule Charter of Radnor Township.

**ENACTED** and **ORDAINED** this            day of            , 2016.

RADNOR TOWNSHIP

By: \_\_\_\_\_  
Name: Philip Ahr  
Title: President

ATTEST: \_\_\_\_\_  
Robert A. Zienkowski, Secretary

Delete  
\_\_\_\_ Add

## Radnor Township

# PROPOSED LEGISLATION

**DATE:** 05/02/2016

**TO:** Robert A. Zienkowski, Township Manager

**FROM:** William A. Colarulo, Police Superintendent

**LEGISLATION:** Ordinance 2016-07 is authorizing Meredith Avenue to become a one-way roadway traveling northwest, from Conestoga Road to Eachus Avenue. (Meredith Avenue from Eachus Avenue to Lowrys Lane, will remain two-way). In addition, Ordinance 2016-07 is rescinding the stop sign on Meredith Avenue traveling south, at the intersection of Conestoga Road. Ordinance 2016-07 is rescinding parking prohibited at the curve of Meredith Avenue, 70 feet north of Conestoga Road and 93 feet north of Conestoga Road covering an area of 23 feet.

**LEGISLATIVE HISTORY:** None.

**PURPOSE AND EXPLANATION:** These changes are necessary to mitigate traffic conflicts on Meredith Avenue.

**FISCAL IMPACT:** None.

**RECOMMENDED ACTION:** The Police Department respectfully requests the Board to adopt the amendment at the regular Board of Commissioners Meeting on \_\_\_\_\_, 2016.