



AMENDMENT

This amendment ("Amendment") is effective as of the date of signature of the last party to sign as indicated below ("Amendment Effective Date"), by and between Tyler Technologies, Inc., a Delaware corporation with offices at 840 West Long Lake Road, Troy, MI 48098 ("Tyler") and the City of Fresno, a California municipal corporation, with offices at 2600 Fresno Street, Room 1059, Fresno, CA 93721 ("Client").

WHEREAS, Tyler and the Client are parties to a License Agreement with an effective date of January 29, 2021 (the "Agreement");

WHEREAS, Tyler and Client now desire to amend the Agreement;

NOW THEREFORE, in consideration of the mutual promises hereinafter contained, Tyler and the Client agree as follows:

- 1. The attached Appendix 4 is hereby added to Exhibit F.
- 2. Paragraph 2.6 of Exhibit B is hereby deleted in its entirety and replaced with the following language:

"2.6 Other Services:

Dedicated Project Management and Integrated Change Management services, if any, will be billed monthly in arrears, beginning on the first day of the month immediately following the initiation of project planning."

- 3. This Amendment shall be governed by and construed in accordance with the terms and conditions of the Agreement. All other terms and conditions of the Agreement shall remain in full force and effect.

IN WITNESS WHEREOF, a duly authorized representative of each party has executed this Amendment as of the date of signature of the last party to sign as indicated below.

Tyler Technologies, Inc.

City of Fresno, a California municipal corporation

By: Robert Kennedy-Jensen

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

Name: Robert Kennedy-Jensen

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

Title: Director of Contracts

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

Date: Mar 30, 2021

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

Approved as to Form:

DocuSigned by:  
By: Brandon Collet 4/14/2021  
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Attest:

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



**Appendix 4**  
**Koa Hills Statement of Work**

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# Munis Finance

## Data Conversion Assistance

### Scope of Work

#### Introduction

Data conversion is an important activity to improve data storage and retrieval processes, ensuring that data is converted with minimal effort, in a well-planned and organized manner. It is beneficial to use proven solutions and methods, so that users will be able to make an informed decision on the solution to be implemented for data conversion.

This effort will utilize a defined process to convert data from a legacy system format through flat file extracts to Tyler Technologies' system. Business rule logic will be applied to legacy flat file data as necessary for data conversion. This process allows for a one-to-one or many- (legacy system) to one (Tyler) system, however it does not provide a method for one-to-many mapping as part of the data conversion process.

#### Modules Included

1. General Ledger – Validated against Chart of Accounts
  - a. Actuals
  - b. Budgets
2. Project Grant Accounting
  - a. Actuals
  - b. Budgets
  - c. Standard
3. Accounts Payable and Checks
  - a. Vendors
  - b. Checks
  - c. Invoices
4. Capital Assets
5. Purchasing
  - a. Standard Open POs
6. Contracts
7. General Billing
  - a. Bills
  - b. Recurring Invoices



## MUNIS DATA CONVERSION SCOPE OF WORK

## c. Standard Customers

**Project Scope**

Koa Hills will work in conjunction with Tyler Technologies and the City of Fresno, CA to determine the data conversion plan, to convert the data for the above modules. The plan will outline the conversion of legacy data by extracting the data from the legacy system into the standardized Munis format along with a plan to load data into the Munis system, in a repeatable and verifiable manner using our established data conversion methodology. If the data import option is used a change order may be necessary.

The City of Fresno, CA will choose the data window timeframe to convert into the Tyler systems. Converting “current” data rather than all historical data is recommended, due to data format modifications in the legacy system. The timeframe for the data to be converted into the Tyler systems should match the timeframe from the Tyler contract.

Koa Hills will lead the data mapping and will apply business rules to filter or modify data, as necessary. This process will proceed in an iterative manner, so that when new data is created in the legacy system it will flow easily during the conversion process.

Koa Hills will assist the City of Fresno, CA with data validation between systems, as needed, once the data has been loaded into Tyler systems.

**Project Plan**

Koa Hills will:

1. Clearly define the scope of the project
2. Actively refine the scope through targeted profiling and auditing
3. Minimize the amount of data to be converted
4. Meet with the City of Fresno, CA to understand any data issues which may need special mapping
5. Map legacy data into new Tyler formats, as needed
6. Provide data clean-up services, as needed
7. Define a realistic timeline, based on knowledge of data issues
8. Secure sign-off on each stage from a senior business representative
9. Prioritize modules for conversion with a top-down, target-driven approach
10. Aim to volume-test all data in the scope as early as possible at the unit level
11. Allow time for volume testing and issue resolution
12. Segment the project into manageable, incremental chunks
13. Keep a total focus on the business objectives and cost/benefits throughout

Once a go-live date has been chosen, the data conversion will be broken up into prioritized work



## MUNIS DATA CONVERSION SCOPE OF WORK

groups to facilitate manageable segments of the project. A data conversion tracking document will be created and shared, to facilitate the data conversion team's ability to achieve a successful go-live date.

The Tyler Technologies conversion team will upload the data provided and return modification requests to be applied during the following data load. The expectation is that the converted data per module will improve between iterations, so that 100% of the legacy data will be present in Tyler systems for validation.

As with all data conversions, the integration between the data owners and the technology team is critical for a successful project. Koa Hills will keep the lines of communication open and transparent throughout the process.

### Roles and Responsibilities

| Conversion task                       | Responsible Party                    |
|---------------------------------------|--------------------------------------|
| Data Conversion planning              | Koa Hills, Tyler, City of Fresno, CA |
| Provide legacy system documentation   | City of Fresno, CA                   |
| Data mapping                          | Koa Hills, City of Fresno, CA        |
| Extract legacy data                   | Koa Hills, City of Fresno, CA        |
| Run proofing reports in legacy system | City of Fresno, CA                   |
| Ensure data is in Tyler format        | Koa Hills                            |
| Clean up data formatting              | Koa Hills                            |
| Submit legacy data to Tyler           | Koa Hills                            |



## MUNIS DATA CONVERSION SCOPE OF WORK

|   |   |
|---|---|
| Convert legacy data and deliver to client               | Tyler                                   |
| Load Conversion data and review in Tyler system (test)  | City of Fresno, CA, Koa Hills as needed |
| Refine legacy data and submit to Tyler (final)          | Koa Hills                               |
| Convert legacy data and deliver to client (final)       | Tyler                                   |
| Load Conversion data and review in Tyler system (final) | City of Fresno, CA, Koa Hills as needed |
| Final approval of converted data                        | City of Fresno, CA                      |
| Load data (final)                                       | City of Fresno, CA, Koa Hills as needed |

**System Access**

Koa Hills will require system access promptly when the project begins so that all timeline objectives are met. Please keep this in mind for project planning.

This SOW is in addition to the contracted amount from Tyler conversion fees. If the City of Fresno, CA would like to change the scope of Conversion from the original agreement, please contact your Tyler sales representative.

The expectation is that KHC will have full access to your data during this project.

Note that travel is billed as incurred and not included in this SOW. A detailed estimate may be provided upon request.

The lack of system documentation and/or required schemas of the legacy system may require additional professional services.



# Tyler Utility Billing Data Conversion Assistance Scope of Work

## Introduction

Data conversion is an important activity to improve data storage and retrieval processes, ensuring that data is converted with minimal effort, in a well-planned and organized manner. It is beneficial to use proven solutions and methods, so that users will be able to make an informed decision on the solution to be implemented for data conversion.

This effort will utilize a defined process to convert data from a legacy system format through flat file extracts to Tyler Technologies' system. Business rule logic will be applied to legacy flat file data as necessary for data conversion. This process allows for a one-to-one or many- (legacy system) to one (Tyler) system, however it does not provide a method for one-to-many mapping as part of the data conversion process.

## Modules Included

1. Utility Billing
  - a. Balance Forward A/R
  - b. Consumption History
  - c. Flat Inventory/Containers
  - d. Service Orders
  - e. Services
  - f. Standard

## Project Scope

Koa Hills will work in conjunction with Tyler Technologies and the City of Fresno, CA to determine the data conversion plan, to convert the data for the above modules. The plan will outline the conversion of legacy data by extracting the data from the legacy system into the standardized Munis format along with a plan to load data into the Munis system, in a repeatable and verifiable manner using our established data conversion methodology. If the data import option is used a change order may be necessary.

The City of Fresno, CA will choose the data window timeframe to convert into the Tyler systems.



## UTILITY BILLING DATA CONVERSION SCOPE OF WORK

Converting “current” data rather than all historical data is recommended, due to data format modifications in the legacy system. The timeframe for the data to be converted into the Tyler systems should match the timeframe from the Tyler contract.

Koa Hills will lead the data mapping and will apply business rules to filter or modify data, as necessary. This process will proceed in an iterative manner, so that when new data is created in the legacy system it will flow easily during the conversion process.

Koa Hills will assist the City of Fresno, CA with data validation between systems, as needed, once the data has been loaded into Tyler systems.

### **Project Plan**

Koa Hills will:

1. Clearly define the scope of the project
2. Actively refine the scope through targeted profiling and auditing
3. Minimize the amount of data to be converted
4. Meet with the City to understand any data issues which may need special mapping
5. Map legacy data into new Tyler formats, as needed
6. Provide data clean-up services, as needed
7. Define a realistic timeline, based on knowledge of data issues
8. Secure sign-off on each stage from a senior business representative
9. Prioritize modules for conversion with a top-down, target-driven approach
10. Aim to volume-test all data in the scope as early as possible at the unit level
11. Allow time for volume testing and issue resolution
12. Segment the project into manageable, incremental chunks
13. Keep a total focus on the business objectives and cost/benefits throughout

Once a go-live date has been chosen, the data conversion will be broken up into prioritized work groups to facilitate manageable segments of the project. A data conversion tracking document will be created and shared, to facilitate the data conversion team’s ability to achieve a successful go-live date.

The Tyler Technologies conversion team will upload the data provided and return modification requests to be applied during the following data load. The expectation is that the converted data per module will improve between iterations, so that 100% of the legacy data will be present in Tyler systems for validation.

As with all data conversions, the integration between the data owners and the technology team is critical for a successful project. Koa Hills will keep the lines of communication open and transparent throughout the process.





## UTILITY BILLING DATA CONVERSION SCOPE OF WORK

**Roles and Responsibilities**

| <b>Conversion task</b>                                   | <b>Responsible Party</b>                 |
|--|--|
| Data conversion planning                                 | Koa Hills, City of Fresno, CA            |
| Provide legacy system documentation                      | City of Fresno, CA                       |
| Data mapping   | Koa Hills, City of Fresno, CA. as needed |
| Extract legacy data                                      | Koa Hills, City of Fresno, CA. as needed |
| Run proofing reports in legacy system                    | City of Fresno, CA                       |
| Ensure data is in Tyler format                           | Koa Hills                                |
| Clean up data formatting                                 | Koa Hills                                |
| Submit legacy data to Tyler                              | Koa Hills                                |
| Convert legacy data and deliver to client                | Tyler                                    |
| Load conversion data and review in Tyler system (test)   | City of Fresno, CA, Koa Hills as needed  |
| Refine legacy data as needed and submit to Tyler (final) | Koa Hills                                |
| Convert legacy data and deliver to client (final)        | Tyler                                    |

## UTILITY BILLING DATA CONVERSION SCOPE OF WORK

|   |   |
|---|---|
| Load conversion data and review in Tyler system (final) | < City of Fresno, CA, Koa Hills as needed |
| Final approval of converted data                        | City of Fresno, CA                        |
| Load data (final)                                       | City of Fresno, CA, Koa Hills as needed   |

**System Access**

Koa Hills will require system access promptly when the project begins so that all timeline objectives are met. Please keep this in mind for project planning.

This SOW is in addition to the contracted amount from Tyler conversion fees. If the City of Fresno, CA would like to change the scope of conversion from the original agreement, please contact your Tyler sales representative.

Expectation is that Koa Hills Consulting will have full access to your data during this project.

Note that travel is billed as incurred and not included in this SOW. A detailed estimate may be provided upon request.

The lack of system documentation and/or required schemas of the legacy system may require additional professional services.



# Tyler Munis HCM Data Conversion Assistance Scope of Work

## Introduction

Data conversion is an important activity to improve data storage and retrieval processes, ensuring that data is converted with minimal effort, in a well-planned and organized manner. It is beneficial to use proven solutions and methods, so that users will be able to make an informed decision on the solution to be implemented for data conversion.

This effort will utilize a defined process to convert data from a legacy system format through flat file extracts to Tyler Technologies' system. Business rule logic will be applied to legacy flat file data as necessary for data conversion. This process allows for a one-to-one or many- (legacy system) to one (Tyler) system, however it does not provide a method for one-to-many mapping as part of the data conversion process.

## Modules Included

1. Human Resources
  - a. Certifications
  - b. Education
  - c. PM Action History
  - d. Position Control
  - e. Recruiting
2. Payroll
  - a. Accrual Balances
  - b. Accumulators
  - c. Check History
  - d. Deductions
  - e. Earnings and Deduction history
  - f. Standard

## Project Scope

Koa Hills will work in conjunction with Tyler Technologies and the City of Fresno, CA to determine the data conversion plan, to convert the data for the above modules. The plan will outline the conversion of legacy data by extracting the data from the legacy system into the standardized Munis



## MUNIS DATA CONVERSION SCOPE OF WORK

format along with a plan to load data into the Munis system, in a repeatable and verifiable manner using our established data conversion methodology. If the data import option is used a change order may be necessary.

The City of Fresno, CA will choose the data window timeframe to migrate into the Tyler systems. Converting “current” data, rather than all historical data is recommended, due to data format modifications in the legacy system. The timeframe for the data to be converted into the Tyler systems should match the timeframe from the Tyler contract.

Koa Hills will lead the data mapping and will apply business rules to filter or modify data, as necessary. This process will proceed in an iterative manner, so that when new data is created in the legacy system it will flow easily during the conversion process.

Koa Hills will assist the City of Fresno, CA with data validation between systems, as needed, once the data has been loaded into Tyler systems.

### **Project Plan**

Koa Hills will:

1. Clearly define the scope of the project
2. Actively refine the scope through targeted profiling and auditing
3. Minimize the amount of data to be converted
4. Meet with the City to understand any data issues which may need special mapping
5. Map legacy data into new Tyler formats, as needed
6. Provide data clean-up services, as needed
7. Define a realistic timeline, based on knowledge of data issues
8. Secure sign-off on each stage from a senior business representative
9. Prioritize modules for conversion with a top-down, target-driven approach
10. Aim to volume-test all data in the scope as early as possible at the unit level
11. Allow time for volume testing and issue resolution
12. Segment the project into manageable, incremental chunks
13. Keep a total focus on the business objectives and cost/benefits throughout

Once a go-live date has been chosen, the data conversion will be broken up into prioritized work groups to facilitate manageable segments of the project. A data conversion calendar will be created and shared, to facilitate the data conversion team’s ability to achieve a successful go-live date.

The Tyler Technologies conversion team will upload the data provided and return modification requests to be applied during the following data load. The expectation is that the converted data per module will improve between iterations, so that 100% of the legacy data will be present in Tyler systems for validation.



## MUNIS DATA CONVERSION SCOPE OF WORK

As with all data conversions, the integration between the data owners and the technology team is critical for a successful project. Koa Hills will keep the lines of communication open and transparent throughout the process.

### Roles and Responsibilities

| <b>Conversion task</b>                                 | <b>Responsible Party</b>                |
|--|---|
| Data conversion planning                               | Koa Hills, City of Fresno, CA           |
| Provide legacy system documentation                    | City of Fresno, CA                      |
| Data mapping   | Koa Hills, City of Fresno, CA           |
| Extract legacy data                                    | Koa Hills, City of Fresno, CA           |
| Run proofing reports in legacy system                  | City of Fresno, CA                      |
| Ensure data is in Tyler format                         | Koa Hills                               |
| Clean up data formatting                               | Koa Hills                               |
| Submit legacy data to Tyler                            | Koa Hills                               |
| Convert legacy data and deliver to client              | Tyler                                   |
| Load conversion data and review in Tyler system (test) | City of Fresno, CA, Koa Hills as needed |

## MUNIS DATA CONVERSION SCOPE OF WORK

|   |   |
|---|---|
| Refine legacy data and submit to Tyler (final)          | Koa Hills as needed                     |
| Convert legacy data and deliver to client (final)       | Tyler                                   |
| Load conversion data and review in Tyler system (final) | City of Fresno, CA, Koa Hills as needed |
| Final approval of converted data                        | City of Fresno, CA                      |
| Load data (final)                                       | City of Fresno, CA, Koa Hills as needed |

**System Access**

Koa Hills will require system access promptly when the project begins so that all timeline objectives are met. Please keep this in mind for project planning.

This SOW is in addition to the contracted amount from Tyler conversion fees. If the City of Fresno, CA would like to change the scope of conversion from the original agreement, please contact your Tyler sales representative.

The expectation is that Koa Hills will have full access to your data during this project.

Note that travel is billed as incurred and not included in this SOW. A detailed estimate may be provided upon request.

The lack of system documentation and/or required schemas of the legacy system may require additional professional services.







# Fresno CA Amendment Koa Hills SOW 020521

Final Audit Report

2021-03-30

|                 |  |
|-----------------|--|
| Created:        | 2021-03-30                                   |
| By:             | John Wright (john.wright@tylertech.com)      |
| Status:         | Signed                                       |
| Transaction ID: | CBJCHBCAABAALdvmCE2kX_YoOX2nN7rpQ6KO2rCOI17m |

## "Fresno CA Amendment Koa Hills SOW 020521" History

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