16. EnerGov Software

Assertion: The City has contracted with outside agencies for services related to EnerGov {Plant Moral and others). We want a review of their contract and how the costs are being allocated since it is not only the Building Dept. that has had major issues with the implementation of the software.

Plante Moran provided consulting services to the City across multiple software platforms. However, the only service paid for by the Building Fund was the EnerGov Solution Stabilization and Optimization Assessment (the "Assessment"). Specifically, Plante Moran investigated all EnerGov modules, including but not limited to the permitting, inspections, and review modules, to identify software optimization opportunities that would improve the permitting system's technical performance.

The contract for this Assessment was executed on May 24, 2022. The work was completed several months afterwards, at a total cost of $79,475, which was charged to the Building Fund. No other Plante Moran services were funded through the Building Fund.

A copy of the contract was never requested, but the City would have provided the contract without reservation.

Attached to support response:
- Executed Contract
- Purchase Order
- Final EnerGov Assessment and Action Plan (Plante Moran Report)

MAY 20, 2022

Make the mark.

CITY OF CAPE CORAL FLORIDA

EnerGov Assessment Services

plante moran | Audit. Tax. Consulting.
Wealth Management.

Table of Contents

Plante & Moran, PLLC
P.O. Box 307
3000 Town Center, Suite 100
Southfield, MI 48075
Tel: 248.352.2500
Fax: 248.352.0018
plantemoran.com

May 20, 2022

Mr. Roberto Hernandez
City Manager
City of Cape Coral FL
1015 Cultural Park Blvd.
Cape Coral, FL 33990

Re: EnerGov Assessment Services

Dear Mr. Hernandez:

Thank you for the opportunity to provide EnerGov stabilization services associated with the City's recent implementation of the EnerGov enterprise business applications for permitting, planning, code, and business tax receipt management. This letter and the accompanying Professional Services Agreement, which is hereby incorporated as part of this engagement letter, confirms our understanding of the nature, limitations, and terms of the services Plante & Moran, PLLC ("PM") will provide to the City of Cape Coral FL ("Client").

Plante Moran's Qualifications: Plante Moran is one of the top 20 largest public accounting and management consulting firms in the nation. With **a history spanning more than 95 years**, our firm provides clients with financial, human capital, operations improvement, strategic planning, technology selection and implementation, cybersecurity, and family wealth-management services. Fortune Magazine has rated Plante Moran as one of the "100 Best Companies to Work for in America" for the last 23 years. Plante Moran has been providing independent enterprise system needs assessment, software selection, and implementation consulting services to governmental clients for the last 40 years. We are proud to solve our clients' most significant challenges as a trusted advisor.

Commitment to Florida: Plante Moran has a very strong commitment serving over 40 public agencies in Florida including Miami-Dade and Broward Counties in addition to the cities of Hollywood, West Palm Beach, Hallandale Beach, Miami, and Ft. Lauderdale, among others. To assist us in this specialization, we are active members of Florida professional associations that have a focus on the application of technology for government in the State, including: FGFOA, FCCMA, FLGISA, BOAF, PAAF, and FTCA. We are proud to be presenting at these organizations including our fourth consecutive year presenting at the Building Officials Association of Florida (BOAF) Conference on June 8, 2022.

Statement of Understanding

Plante Moran understands the Client completed the implementation of Tyler's EnerGov Civic Services Software for enterprise permitting, planning, and code enforcement activities in February 2022. This implementation began in 2019 to replace the City's legacy TRAKiT permitting system.

This implementation was performed in the context of the following challenges:

- The City transferred 5,000 active permits from the legacy system to the new system.
- The City completed a historical conversion of 620,000 permits and 3.2 million inspection results from the legacy system.
- The City instituted a nine (9) day hold on processing permits to clear the backlog creating significant work and negatively impacted the City's ability to meet service level expectations.
- The City has experienced significant delays is processing single-family residential permits.
- The City's IT Team is meeting daily with Development Services to assess significant performance issues pertaining to EnerGov system disruptions and unplanned service outages impacting the City's ability to process permits.
- The City is currently hosting its own instance of EnerGov 2020 and is planning to upgrade to v. 2021 to address performance impacts.
- The City recently converted over to Tyler Munis Financials after acquiring EnerGov to overcome integration challenges with the legacy JD Edwards system.
- The City and Tyler Technologies experienced significant staff turnover during the 18+ month implementation period during the COVID pandemic.
- The City is experiencing challenges to achieving customer service levels and realizing expected efficiencies.

Given the expected constituent service capabilities of EnerGov, City Council has elevated the priority to stabilize the system in order to achieve the benefits anticipated by the City's citizens and customers.

Scope of Services

Based on PM's understanding of the City's current situation, the Client seeks an external consulting advisor with experience in being involved in Tyler EnerGov deployments with a strong understanding of the EnerGov product including its technical and functional capabilities in supporting related City business processes.

In Phase 1: EnerGov (CD) Solution Stabilization, PM proposes to address the City's immediate and strategic business goals involving the stabilization and optimization of the EnerGov environment.

Phase #1: EnerGov Solution Stabilization: As requested by the Client, PM will complete an assessment of the existing EnerGov deployment within a 45-buiness day evaluation period and will provide specific observations and recommendations to assist the Client's planning for stabilization of EnerGov.

As requested by the Client in consultation with PM, a site visit to a comparable municipality that deployed EnerGov (on-premise) that reflects the same scale and magnitude of the Client's environment will be organized, facilitated, and findings/observations documented.

Phase #2: EnerGov Optimization: PM will provide the City with continuing advisory support to implement the recommendations represented to the City in the assessment phase. The advisory support services will be provided to address immediate and strategic business goals.

Staffing: PM will provide an experienced team of consultants to provide services to Client as follows:

- Scott Eiler as Project Director, a 25+ veteran in enterprise technology solution consulting leading Plante Moran's Southeast Government Technology and Operations Practice
- Chris Blough as Project Manager with experience on six EnerGov implementations with municipal clients including Doral FL and West Palm Beach FL. He is a certified project management professional (PMP) with 11 years of public service experience as a code enforcement officer, community planner, and GIS professional.
- Glenn Park as Principal Consultant who has advised 15+ public organizations to implement EnerGov systems since over the past six years.
- Bryan Tun as Senior Consultant who has advised 15+ public organizations with EnerGov system configuration and implementations.

- Jared Tan as a Report Developer with extensive experience working with SQL, Crystal Reports, and SQL Server Reporting Services who has experience managing over 200+ EnerGov forms and reports including templates, performance reporting, and report definition templates.

Plante Moran will be jointly delivering these services with the Park Consulting Group, a subconsultant exclusively focused on the implementation of permit management systems. Plante Moran and Park Consulting have dedicated, government technology consulting practices providing advisory, selection, and implementation services. Neither Plante Moran or Park Consulting resells permitting systems or has a business relationship with EnerGov or any other vendor selling permitting systems to the public sector. This partnership will provide the City a unique combination of expertise and independence ensuring the objectivity of recommendations for the City's strategic benefit.

Should additional expertise be required, PM may have additional staff members provide services with the approval of Client's Project Manager. Please see resumes attached to this proposal as **Exhibit A: Plante Moran Staff Resumes.**

Project Work Plan

Phase 1 - EnerGov Solution Stabilization: Plante Moran will provide a post-implementation review of Tyler Technologies EnerGov permitting, land management, code enforcement, and business licensing application and its primary system integrations with Tyler Munis, Tyler Cashiering, Tyler 311, Tyler Hub, Esri GIS, EnerGov CSS, Bluebeam electronic plan review, and Laserfiche.

Activity 1.1 - Project Management and Initiation

1. Conduct project management related initiation activities including stakeholder identification, identity/review supporting documents, and review project roles/responsibilities. Review Client's annual EnerGov support contract with Tyler Technologies to determine all SaaS software entitlements, managed services, and support services available to the City.

   Deliverable: Supporting Document Inventory

2. Develop a SharePoint site (Plante Moran can provide) for centralizing access to project documents.

   Deliverable: Project SharePoint Collaboration Site

3. Establish project status meeting schedule with the Client Project Manager/Sponsor via web conference call to provide updates regarding project activities.

Deliverable: Weekly Project Status Meetings, Monthly Executive Briefings

4. In conjunction with the Client's designated Project Manager/Sponsor, identify the core project team of key stakeholders and subject matter experts in a stakeholder registry. PM assumes the Client's team will identify key Client stakeholders and secure their commitments to assist with project activities.

   Deliverable: Project Stakeholder Register

5. Develop a timeline for the project activities, to align with the Client's needs and other resource commitments, and document this in a Microsoft Project Plan.

   Deliverable: Project Schedule with Resource Commitments

6. Prepare/Affirm Project Charter for the Client's Project Manager to review and use to communicate project objectives and aligning the Client's business expectations.

   Deliverable: Project Charter, Project Log

7. Design and facilitate a kick-off presentation with orientation for project stakeholders to inform and schedule remote interviews. This will allow us to focus PM's interviews to better understand current processes and systems being used and maximize the value of stakeholder time.

   Deliverable: Stakeholder Kick-Off Presentation, Scheduled Interviews

Activity 1.2 EnerGov System Stabilization

1. Conduct Interviews: Conduct remote interviews with the Client's project team to determine post-implementation gaps, remaining implementation services, solution strengths, weaknesses, opportunities, and unfulfilled business needs.

   Deliverable: PM will provide up to 20 hours of stakeholder interviews with 2 consultants (one onsite and one or more offsite) between key Client stakeholders and subject matter experts (SME's). PM will also provide weekly executive briefings following each week of interviews to provide immediate feedback to leadership, implementation teams, and SME's to focus on the implementation.

2. System Implementation Assessment: During the interviews, PM will review the configured systems, processes, and decisions associated with Exhibit B: In-Scope EnerGov Business Function Review Areas.

- Confirm the integration status and approach for supporting side or "shadow" systems and the development and testing of required system interfaces.
- Review and identify incomplete Tyler professional services for configuration, data migration, forms development, testing, and training services to be provided and determine if they are in-scope for Tyler's implementation contract with the City.
- Review and identify incomplete legacy data for migration.
- Review EnerGov CSS configured workflows.
- Review Bluebeam configured electronic plan reviews.
- Review managed support services provided by Tyler for the management responsibilities.

Deliverable: Issues and Opportunities Matrix including the status of the elements of people, process, and technology categories associated with the deployment of the EnerGov Solution.

3. Peer Community Site Visit: PM will facilitate 1.5 days (12 hours) of a physical site visit with a peer community that has deployed EnerGov.
   Deliverables:
   - Prepare discovery agendas and questions informed by the system implementation assessment for Client stakeholders meeting with peer business functions including permitting, code enforcement, contractor licensing, and planning.
   - Facilitate interactive discussions using Plante Moran's experience navigating the challenges and pain points of EnerGov implementations.
   - Document meeting notes, action items, and lessons learned during the interviews.
4. Plan of Action: Recommendations will be provided to the City to include but not be limited to the following:
   - Upgrade path for EnerGov, MUNIS, HUB, and other Tyler integrated solutions
   - Identification of strategies to manage a stable EnerGov environment
   - Schedule and sequencing of specific recommendations presented from the assessment to address identified issues with near-term and long-term recommendations

Deliverable: Plan of Action with EnerGov Stabilization Recommendations

Phase 2 – EnerGov Optimization: Plante Moran will assist, as directed and required by the Client, in providing services associated with implementation of the recommendations identified in the Plan of Action. The services necessary to support these activities will be scoped in consultation with the Client.

Work Plan Scope Assumptions

- To meet the Client's objectives, we propose the Phase 1 Work Plan tasks to be completed remotely in about 45-business days from Client's notification to proceed. Phase 2 Work Plan tasks are dependent on the needs of the City coming out of Phase 1.

- Phase 1 Peer Community Site Visit: Plante Moran will provide 1.5 of on-site facilitation services at the City of Des Moines, IA. At the Client's option, these services will be delivered remotely if the Client determines an on-site visit cannot be completed within the expected assessment timeframe.

- The Client will provide executive sponsorship and a designated project manager during all project activities.

- PM and Client mutually understand that the required activities will be based upon the availability of information and ready access to Client staff. PM will coordinate with the Client's Project Manager/Sponsor to determine the best course of action to balance the project objectives in a cost-effective manner. To this end, all meetings will be scheduled a minimum of one-week in advance to ensure the availability of all parties.

- Client will take responsibility for confirming the schedule availability for all Client staff and will distribute meeting invitations for all project activities in conjunction with PM's project manager.

- PM's discovery will be limited to the business processes identified in Exhibit B: EnerGov Process Inventory Scoping Areas.

- Client stakeholders will use Plante Moran's SharePoint collaboration site as the primary way to revise/exchange documents including deliverables, interview questionnaires, and supporting background information.

- Client stakeholders are forthcoming in sharing their experiences surrounding current process challenges and desires for the future state processes in addition to those presented by PM for consideration.

- Client will assist with the identification and scheduling of its staff to participate in interviews and confirm Client staff availability for all meetings.

- All services as part of this initial scope of work, with the exception of the onsite activities identified in the work plan scope assumptions, will be provided remotely using Microsoft Teams collaboration tools in conjunction with other tools the Client and/or PM identify to be of mutual benefit to achieving project objectives.

Fees and Payment Terms

Plante Moran proposes a firm-fixed fee for all Phase 1 activities of $79,475 inclusive of all travel costs. The fee for Phase 2 is not included in the fee for phase 1. The fee for Phase 2 will be determined and is contingent upon completion of phase 1. After phase 1 activities are complete, a scope of services with a corresponding level of effort will be prepared in a separate proposal for Phase 2 services. This way a level of service can be established based upon the City's resource requirements and capacity to implement the assessment's recommendations. At Client's option, PM can provide additional services as an amendment to this agreement for a blended rate of $260/hr., inclusive of expenses.

As you probably realize, our primary cost is salaries that are paid currently. Accordingly, our invoices will be rendered periodically and are due when received.

Fee Assumptions

The fees presented are based on the assumptions below. Should these assumptions change, PM would adjust its professional fees accordingly, in consultation with the Client. In the event an invoice is not paid timely, a late charge in the amount of 1.25 percent per month will be added, beginning 30 days after the date of the invoice.

a. Client stakeholders will be available to attend meetings and fully participate in discovery activities.

b. Onsite Activities: Plante Moran will be onsite at Client for up to three consecutive days in a single site visit to facilitate stakeholder interviews.

c. All onsite work activity will be confirmed at least two weeks prior to the agreed upon date. Any changes to agreed upon scheduled activities resulting in travel change fees after the agreed upon period will be expensed to the Client at actual cost.

d. All services for this project will be performed in accordance with both the Client's and PM's COVID-19 safety protocols.

e. Project risks will be immediately documented with proactive mitigation strategies.

f. Client will provide a designated project manager to meet with PM on a regular basis to discuss project issues and manage change requests that may impact schedule, staff availability, resource commitments, and the quality of results.

g. Information presented by Plante Moran is well organized and thorough such that project related decisions are made in a timely manner by the Client.

h. Given the schedule expectations the Client has set forth, there will be a single draft-to-final process for each deliverable. PM expects the Client to provide timely feedback on the review of all deliverables submitted for review and acceptance.

i. PM will provide a deliverable acceptance review period of 10 business days for review. If no revisions are received within this timeframe, the deliverable will have been deemed to be accepted. Any scheduling impacts resulting for an extended deliverable review may justify a change request to extend the project schedule.

If you are in agreement with our understanding of this engagement as set forth in this engagement letter and the accompanying Professional Services Agreement, please sign a copy of this letter and return it to us with the accompanying Professional Services Agreement.

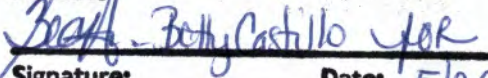Thank you for the opportunity to serve you.

Very truly yours,

PLANTE & MORAN, PLLC

E. Scott Eiler

E. Scott Eiler, Partner

ATTEST:

Signature: ~~Betty Castillo for~~   Date: 5/25/2022

Kimberly Bruns, CMC – City Clerk

Agreed and Accepted

We accept this engagement letter and the accompanying Professional Services Agreement (collectively, "Agreement"), which set forth the entire agreement between City of Cape Coral FL and Plante & Moran, PLLC with respect to the services specified in the "Scope of Services" section of this engagement letter. This Agreement may be amended by written agreement between Plante & Moran, PLLC and City of Cape Coral FL.

City of Cape Coral, FL

Mr. Roberto Hernandez   **Date** 5/24/22

APPROVED AS TO FORM:
By:_____
City Attorney's Office
Date: 5/23/2022

City Manager

Exhibit A: Plante Moran Staff Resumes

The following proposed staff will support the delivery of our Scope of Services. Detailed project experiences are provided for team experience relevant to the City's business interests.

Project Staff	Project Role and Responsibility
Scott Eiler Partner	**Project Director – Engagement Partner** Overall responsibilities for ensuring that all project tasks through the duration of the engagement are completed within schedule and budget and that all project deliverables meet the required quality standards.
Christopher Blough, PMP Senior Manager	**Project Manager / Lead Consultant** Chris leads a Public Services Delivery Practice with 20 years of technology applications management experience serving over 40 county, municipal, and special purpose governments. He specializes in strategic technology planning and system selections involving permitting, regulatory compliance, asset management, inventory, capital planning, and GIS. Chris has overall responsibility for ensuring the project tasks are completed on schedule, within budget, and meet appropriate quality standards ensuring the City is achieving its project objectives. Chris is currently supporting the EnerGov implementation at the City of West Palm Beach, FL and other communities.
Glenn Park Principal Consultant	**Lead Consultant** 15+ years of experience in leading programs and projects in technology strategy, system implementations, and vendor selections, for municipal and private sector clients. Glenn has partnered extensively with municipalities' directors, project leaders, technical experts, and staff to implement Tyler Tech EnerGov systems to enable Planning and Development Services, Transportation, Public Safety, and Constituent Services processes.
Bryan Tung Senior Consultant	**LMS Consultant** Senior Consultant with first-hand experience in building and planning operations and processes. Bryan has extensively applied his experiences as an expert in EnerGov system configuration and implementation. Bryan has partnered with Park Consulting Group's municipal clients for project implementation, business analysis, configuration, and maintenance/ enhancements needs.

Project Staff	Project Role and Responsibility
Jared Tan Report Developer	LMS Consultant Report developer and database consultant, custom built and updated over 200+ EnerGov forms and reports, partnering extensively with Park Consulting Group's clients in designing, developing, deploying, and enhancing form templates, statistical reports, and store procedures/ query/ extracts in SQL, Crystal Reports, and SSRS.

Scott Eiler, PMP

Project Director — Engagement Partner

Summary of Experience

Scott has over thirty years' experience assisting clients with various technology related needs and twenty-three years specifically devoted to serving governmental clients at the local, County and State level. He has extensive experience in providing numerous technology services for governmental clients including technology planning, technology assessments, software selections and implementation management assistance. He is also a champion within the firm on the development and education of staff on project management theory, tools and techniques.

Education

Master of Business Administration
University of Michigan

Bachelor of Science in General Engineering
University of Illinois

Professional Training & Affiliations

Public Technology Institute (PTI)

Government Finance Officers Association (GFOA)

Florida Government Finance Officers Association (FGFOA)

Project Management Institute (PMI)

Project Management Professional (PMP) since 2003

ITIL V3 Foundation Certified

Prosci Change Management Certified

Selected Key Clients

- Broward County, FL
- Calhoun County, MI
- Cuyahoga County, OH
- Dane County, WI
- Miami-Dade County, FL
- DuPage County, IL
- Gwinnett County, GA
- Hancock County, OH
- Horry County, SC
- Johnson County, KS
- Kent County, MI
- Lake County, IL
- Oakland County, MI
- St. Louis County, MO

- City of Dublin, OH
- City of Kalamazoo, MI
- City of Chicago, IL
- City of Carrollton, TX
- City of Hallandale Beach, FL
- City of Mesa, AZ
- City of North Miami Beach, FL
- City of Ann Arbor, MI
- City of Miramar, FL
- City of Columbia, MO
- Town of Jupiter, FL
- City of Midland, MI
- City of Owensboro, KY
- City of Chandler, AZ

- Waukesha County, WI
- Urbana & Champaign Sanitary District, IL
- City of Cleveland, OH
- City of Battle Creek, MI
- City of Hollywood, FL
- Charter Township of Shelby, MI
- City of Pueblo, CO
- City of Pinellas Park, FL
- Central Ohio Transit Authority, OH
- State of Michigan

Christopher Blough, MPA, PMP

Project Manager

Summary of experience

Chris leads Plante Moran's Public Services Practice with 20 years of technology applications management specializing in county, municipal, and special purpose government operations. As credentialed project manager and an ITIL certified applications manager, he leads enterprise service delivery projects involving systems for regulatory compliance (licensing, permitting, land management), core financials, human resources, purchasing, inventory management, capital budgeting, geographic information systems (GIS), and enterprise asset and work management (EAM/CMMS). He also leads project teams to assess business opportunities, compare solution options, evaluate, and select solutions, negotiate contracts, and deliver implementation advisory services to ensure realization of expected outcomes.

Credentialed IT Project Manager: By working with over 50 local government organizations in his career, Chris offers proven methods and firsthand experience enabling public sector professionals to increase the business value derived from enterprise systems and applications. He leads project teams to assess business opportunities, prepare options analyses, evaluate and select solutions, negotiate technology contracts, and provide third-party implementation advisory services.

Public Sector IT Leadership: As a former public servant working in county and municipal government technology leadership roles over 11 years, he recognizes opportunities for collaboration and joint investment in technology initiatives applying return-on-investment strategies. His clients recognize his ability to lead multi-disciplinary teams to build compelling business cases linked to outcomes to establish ownership and accountability.

LEAN Six Sigma (LSS) Process Optimization: Chris integrates LSS practices with clients to optimize business processes by increasing customer value recognition throughout the IT service delivery lifecycle for both internal and external stakeholders. He equips clients to qualify and prioritize IT projects and services using data-driven and analytics insights.

IT Program Governance and Project Governance: Chris coaches and trains clients to prepare IT governance strategies to deliver short and long-term organizational commitments to ensure people, process, and technology sustain their expected value.

Recent and relevant project experiences

Education

Master of Public Administration, Eastern Michigan University

Bachelor of Science in Geography/ Earth Science, Central Michigan University

Selected publications

The GIS Guide for Elected Officials, City of Novi, MI – Moving Novi's Online Mapping Services to the Cloud, Esri Press, 2014

Professional training & affiliations

Project Management Professional (PMP), Project Management Institute (Certificate #1373368)

Lean Six Sigma Green Belt, Purdue University

IT Service Management, ITIL v3 Foundation, APM Group Ltd. (2012)

Institute of Asset Management Certificate #1029965

Building Officials Association of Florida

Project Management Institute, Great Lakes Chapter

Esri International User Conference 2006, 08, 10, 12*, 15, 19 (*Special Achievement in GIS Award on behalf of Novi, Michigan)

Selected clients

City of West Palm Beach, FL: Project Manager, CD Assessment, Business Process Evaluation, Selection, and Implementation Management

County of Collier FL: Project Manager, Business Process Mapping and Documentation

City of Des Moines IA: Project Manager, CD System Assessment and Selection

City of Hollywood, FL: Lead Consultant, CD Permitting Business Needs Evaluation

City of St. Charles, IL: Project Manager, CD Needs Assessment and Requirements Definition

City of Sunnyvale CA: Project Manager, CD System Assessment and Selection

Santa Margarita Water District CA: Project Manager for GIS Program Implementation Advisory Services

City of West Palm Beach, FL, Permitting System Replacement (In Progress): Lead consultant for one of Florida's fastest growing communities facing an 11% annual increase in permitting activity and a $2 billion backlog in proposed and scheduled projects in 2017. The project involved discovery and process definition for 12 departments and 30 business units involving over 120 staff. It also examined ways to streamline business tax receipts processes to ensure the fair and equitable collection of $3.6 million in annual revenues. The project scope involved process diagramming for 27 major processes involving 750 activities. Through this process discovery, the City is using 80 use cases specific to core business requirements involving software demos representing business needs of Planning, Building Safety Code, Engineering, Utilities, Fire, Police, Public Works, Parks and Recreation, and Property Code Enforcement. The City is currently implementing Tyler's EnerGov land management system.

County of Collier, FL, Mapping and Documentation of Core Business Processes (Completed January 2019): Project manager for a continuous improvement initiative launched in response to significant population growth and services demand following Hurricane Irma addressing customer service, planning, building, code enforcement, and operations administration areas of the County's Growth Management Department, Development Services Agency. The project involved the documentation of current-state and future-state business processes spanning all functions of the land development and code enforcement lifecycle. Services included training on LEAN and Six Sigma principles contributing to an Agency-wide, performance management framework including the creation of performance metrics and continuous improvement strategies. It also included a position turnover analysis involving 350 employees assessing the impacts at the process level involving over 800 activities performed to administer enforcement and compliance in accordance with County, State, and Federal land development laws. Strategies to promote the introduction and adoption of performance measures were featured along with stakeholder change management techniques to promote adoption of the processes identified.

City of Sunnyvale, CA, Permitting System Assessment and Replacement (Completed May 2019): Project Manager responsible for providing a citywide needs assessment and plan of action for the implementation and selection of the City's replacement permitting system supporting in-scope service areas including Community Development, Public Works, Public Safety, Economic Development, and Finance. The City's annual, commercial construction value in 2017 was $907 million with permitting revenues of $19.4 million. The project applied LEAN process evaluation techniques involving over 60 staff in operations areas supporting all phases of

development including utility infrastructure acceptance, right-of-way permitting, franchise agreement inspections, and performance guarantees. The City evaluated solutions from Tyler Technologies, Infor, Accela, and CSDC (Calytera) involving Plante Moran's structured RFP process, facilitated vendor demonstrations, and contract negotiations advisory services.

Des Moines, IA, Assessment & Business Systems Replacement (Completed May 2017): Project Manager overseeing the business needs to replace the City's 20-year old Accela Tidemark information system serving 12 departments and 30 business units. Des Moines' 7% is annual permitting activity growth coupled with being the nucleus of the fastest growing metro region in the Midwest in terms of population, GDP, and jobs in 2016. Over 70 Community Development staff engaged in the project were using 49 different business systems to serve the public. The project resulted in significant process streamlining with 28 systems identified for replacement. The City's GIS integration was supported to provide a single point of entry for addresses within GIS which would automatically validate all addresses used in the replacement permitting solution. The City selected Tyler Technologies EnerGov product for its final solution.

GLENN PARK LMS PRINCIPAL CONSULTANT

Principal Consultant with 15+ years of experience in leading programs and projects in technology strategy, system implementations, and vendor selections, for municipal and private sector clients. Glenn has partnered extensively with municipalities' directors, project leaders, technical experts, and staff to implement Tyler Tech EnerGov systems to enable Planning and Development Services, Transportation, Public Safety, and Constituent Services processes.

Expertise

- Program/Project Management
- Land Management Systems
- Technology Strategy
- Systems Implementation
- RFP/ Selection/ Contracting
- Process Improvement
- Vendor Management
- Stakeholder Management
- Change Management

Recent Tyler Tech EnerGov Experience (Past 5 Years – 2016-Current)

- City of Tucson – EnerGov Project Implementation Advisor
- City of Lake Forest – EnerGov Implementation Project Manager/ Business Analyst/ System Admin
- City of Newport Beach – EnerGov Implementation Advisor
- City of Rancho Cordova – EnerGov Implementation Advisor
- City of Santa Ana – EnerGov Prototype Implementation Project Manager
- City of Temecula – EnerGov Project Manager/ Business Analyst/ System Admin
- City of Laguna Beach – EnerGov Project Manager/ Business Analyst
- City of Laguna Woods – EnerGov Implementation Advisor
- City of Westminster – EnerGov Implementation Advisor
- City of Thousand Oaks – EnerGov Project Manager
- City of Fullerton – EnerGov Implementation Project Manager
- City of Ventura – EnerGov Implementation Advisor
- City of Simi Valley – EnerGov Implementation Advisor
- City of Sunnyvale – EnerGov Project Manager Advisor
- City of Henderson – EnerGov Procurement Advisor
- County of Maui – EnerGov Implementation Advisor

Education

Claremont Graduate University, MBA – Strategy

University of Washington, Bachelors – Finance

Training and Certifications

EnerGov Fundamentals Training

EnerGov Administrator Training

EnerGov Configuration Training

Project Management Institute (PMI) Member

PROSCI Change Management Certification

CompTIA Project+ Certification

ITIL Foundation Certification

BRYAN TUNG LMS SENIOR CONSULTANT

Senior Consultant with first-hand experience in building and planning operations and processes. Bryan has extensively applied his experiences as an expert in EnerGov system configuration and implementation. Bryan has partnered with Park Consulting Group's municipal clients for project implementation, business analysis, configuration, and maintenance/ enhancements needs.

- Building & Planning Processes
- EnerGov System Implementation
- Requirements Gathering

- Process Documentation
- Systems and Process Analysis
- Project Management Tools

- Functional Documentation
- Stakeholder Management
- Data Entry/Clean Up

Recent Tyler Tech EnerGov Experience (Past 5 Years – 2016-Current)

- City of Tucson – EnerGov Configuration and Implementation Lead/ Business Analyst
- City of Sunnyvale – EnerGov Configuration Lead/ Business Analyst
- City of Tustin – EnerGov Configuration Lead/ Business Analyst
- City of Gilroy – EnerGov Configuration Lead/ Business Analyst
- City of Laguna Woods – EnerGov Business Analyst/ System Admin
- City of Westminster – EnerGov Implementation Project Lead/ Business Analyst/ System Admin
- City of Simi Valley – EnerGov Implementation Lead Functional Analyst/ System Admin
- City of Fullerton – EnerGov Implementation Business Analyst
- City of Santa Ana – EnerGov Prototype Lead Consultant
- City of Laguna Beach – EnerGov Business Analyst
- City of Ventura – EnerGov Implementation Lead Functional Analyst
- County of Maui – EnerGov Implementation Functional Analyst
- City of Temecula – EnerGov System Data Analyst
- City of Lake Forest – EnerGov Fees Updates Consultant/ System User (Planning Intern)

- City of Henderson – EnerGov Procurement Analyst

Education

University of California Irvine, Master of Urban and Regional Planning

University of California Irvine, Bachelors in Social Ecology

Licenses and Certifications

Project Management Institute (PMI) Member

EnerGov Fundamentals Training

EnerGov Administrator Training

EnerGov Configuration Training

JARED TAN LMS REPORT DEVELOPER

Report developer and database consultant, custom built and updated over 200+ EnerGov forms and reports, partnering extensively with Park Consulting Group's clients in designing, developing, deploying, and enhancing form templates, statistical reports, and store procedures/ query/ extracts in SQL, Crystal Reports, and SSRS.

- Crystal Reports Design
- SQL Stored Proc Development
- Functional Documentation

- EnerGov System Implementation
- SSRS Reports Design
- Data Extracts and Queries

- Requirements Gathering
- Data and Query Analysis
- Data Entry/Clean Up

Recent Tyler Tech EnerGov Experience (Past 5 Years – 2016-Current)

- City of Tucson – Reports Design and Developer/ Extract Developer/ Query Developer
- City of Sunnyvale – Reports Design and Developer / Query Developer
- City of Rancho Cordova – Reports Design and Developer / Query Developer
- City of Ventura – Reports Design and Developer / Query Developer
- City of Simi Valley – Reports Design and Developer / Query Developer
- City of Laguna Woods – Reports Design and Developer/ Extract Developer/ Query Developer
- City of Lake Forest – Reports Design and Developer/ Extract Developer/ Query Developer
- City of Westminster – Reports Design
- City of Henderson – Data Conversion Consultant
- County of Athens Clarke – Data Conversion Consultant
- County of Maui – Reports Design and Developer/ Extract Developer/ Query Developer
- County of Hawaii – Reports Design and Developer/ Extract Developer/ Query Developer

Education, Licenses, and Certifications

University of California Los Angeles, bachelor's in engineering

Licenses and Certifications

Microsoft SQL Server Database Programming– Univ. of California Irvine

EnerGov Fundamentals Training

EnerGov Configuration Training

Park Consulting Group Client EnerGov Experience Profile

AGENCY	SCOPE OF WORK TASKS							
	EnerGov Program and Product Advisory Services	Enable EnerGov Online Portal	EnerGov Workflow and Config Enhancements	Leading Practices in LMS and EnerGov	Future EnerGov Enhancements and Upgrades	EnerGov Report Development	EnerGov Project Meetings and Discussions	Support City's EnerGov Admins
TUCSON, AZ	X	X	X	X		X	X	
FULLERTON, CA	X	X	X	X	X	X	X	X
GILROY, CA	X	X	X	X			X	
HENDERSON, NV	X		X	X	X		X	X
IMPERIAL COUNTY, CA	X	X	X	X			X	
LAGUNA BEACH, CA	X	X	X	X	X	X	X	X
LAGUNA WOODS, CA	X	X	X	X	X	X	X	X
LAKE FOREST, CA	X	X	X	X	X	X	X	X
MAUI COUNTY, HI	X			X	X	X	X	
HAWAII COUNTY, HI	X		X	X	X	X	X	X
NEWPORT BEACH, CA	X		X	X			X	X
RANCHO CORDOVA, CA	X		X	X	X	X	X	X
SANTA ANA, CA	X			X			X	
SIMI VALLEY, CA	X	X	X	X	X		X	X
SUNNYVALE, CA	X	X	X	X		X	X	X
TEMECULA, CA	X	X	X	X	X	X	X	X

	1	2	3	4	5	6	7	8
THOUSAND OAKS, CA	X	X	X	X			X	
TUSTIN, CA	X			X	X	X	X	X
VENTURA, CA	X			X			X	X
WESTMINSTER, CA	X	X	X	X	X	X	X	X

Exhibit B: In-Scope EnerGov Business Function Review Areas

EnerGov Module	Function	Process
Licensing	Business Tax Receipts	New Business Registration
Licensing	Business Tax Receipts	Business Registration Renewal
Licensing	Business Tax Receipts	BTR/Zoning Compliance (Commercial)
Licensing	Business Tax Receipts	BTR/Zoning Compliance (Home Based Business)
Licensing	Licensing	Professional Licensing
Global	Address Management	New Address/Address Change
Plan	Planning	Quasi-judicial Plans (Hearing Examiner)
Plan	Planning	Legislative Plans (Planning Commission)
Permitting	Planning Permits	Temporary Use Permit and Sign Permit Processes
Permitting	Building Construction Permitting	Contractor Licensing / Verification
Permitting	Building Construction Permitting	Application Intake
Permitting	Building Construction Permitting	Plan Review (by Discipline)
Permitting	Building Construction Permitting	Inspections (by Discipline)
Permitting	Building Construction Permitting	Final Approval (Certificates of Completion, Use, Occupancy)
Permitting	Parks and Recreation	Special Event Permits
Permitting	Public Works	Driveway-Resod Permit and Right-of-Way Permit Processes
Code	Code Compliance	Case Initiation, Violations, and Compliance Achieved

Exhibit B: In-Scope EnerGov Business Function Review Areas		
Code	Code Compliance	Special Magistrate Hearing Process
Code	Code Compliance	RV and Boat Permit Process
Code	Code Compliance	Abatement Performed, Liens/Assessments for Costs/Fine Recovery

Professional Services Agreement
Addendum to Plante & Moran, PLLC Engagement Letter

This Professional Services Agreement is part of the engagement letter dated May 17, 2022 between Plante & Moran, PLLC (referred to herein as "PM") and City of Cape Coral FL (referred to herein as "Client").

1. **Management Responsibilities** – The services PM will provide are inherently advisory in nature. PM has no responsibility for any management decisions or management functions in connection with its engagement to provide these services. Further, Client acknowledges that Client is responsible for all such management decisions and management functions; for evaluating the adequacy and results of the services PM will provide and accepting responsibility for the results of those services; and for establishing and maintaining internal controls, including monitoring ongoing activities, in connection with PM's engagement. Client has designated Matthew Grambow, Special Projects Coordinator, to oversee the services PM will provide.

   Client represents and warrants that any and all information that it transmits, or otherwise makes available, to Plante Moran will be done so in full compliance with all applicable federal, state, local, and foreign privacy and data protection laws, as well as all other applicable regulations and directives, as may be amended from time to time (collectively, "Data Privacy Laws"). Client shall not disclose personal data of data subjects ("Personal Data") who are entitled to certain rights and protections afforded by Data Privacy Laws to PM without prior notification to PM. Client shall make reasonable efforts to limit the disclosure of Personal Data to PM to the minimum necessary to accomplish the intended purpose of the disclosure to PM.

2. **Nature of Services** – PM's analysis will be based on information and records provided to PM by Client. PM will rely on such underlying information and records and the analysis will not include audit or verification of the information and records provided to PM in connection with the analysis.

   The analysis PM will perform will not constitute an examination or audit of any Client financial statements or any other items, including Client's internal controls. Additionally, this engagement will not include preparation or review of any tax returns or consulting regarding tax matters. If Client requires financial statements or other financial information for third-party use, or if Client requires tax preparation or consulting services, a separate engagement letter will be required. Accordingly, Client agrees not to associate or make reference to PM in connection with any financial statements or other financial information of Client. In addition, PM's engagement is not designed and cannot be relied upon to disclose errors, fraud, or illegal acts that may exist. However, PM will inform you of any such matters that come to PM's attention.

3. **Use of Report** – At the conclusion of PM's analysis, PM will provide Client with a written report as described in the accompanying engagement letter. PM's report will be restricted solely to use by management of Client and Client agrees that PM's report will not be distributed to any outside parties for any purpose other than to carry out legal responsibilities of Client. PM will have no responsibility to update PM's report for any events or circumstances that occur or become known subsequent to the date of that report.

4. **Interactive Analyses and Visualizations** – In instances where PM expressly agrees in the accompanying engagement letter to provide interactive analyses or visualization tools (collectively, "Electronic Documents") to Client, such Electronic Documents will be provided in a format determined to be acceptable to both parties. Client acknowledges and agrees that Client's ability to access such Electronic Documents may require software programs that PM does not develop, license, or support, and Client shall be solely responsible for the costs to obtain, use, or support any such required software. PM makes no representation or warranty with respect to such software or the continuing functionality of such software relative to the Electronic Documents

and disclaims any and all express or implied warranties if any, associated with such software, its merchantability, and/or its fitness for any particular use by Client.

If and to the extent provided by PM, Electronic Documents are provided solely for the purpose of supporting the written report and are to be used only as expressly described in and authorized by the written report. PM disclaims any responsibility for any use of the Electronic Documents that is not expressly provided for in and authorized by the written report. Further, Client acknowledges that Client is solely responsible for evaluating the adequacy and accuracy of any results generated through the use of Electronic Documents. PM will have no responsibility to support or update the Electric Documents for any events or circumstances that occur or become known subsequent to the date of their corresponding written report.

Client acknowledges that PM may utilize proprietary works of authorship that have not been created specifically for Client and were conceived, created, or developed prior to, or independent of, this engagement including, without limitation, computer programs, methodologies, algorithms, models, templates, software configurations, flowcharts, architecture designs, tools, specifications, drawings, sketches, models, samples, records, and documentation (collectively, "PM Intellectual Property"). Client agrees and acknowledges that PM Intellectual Property is and shall remain solely and exclusively the property of PM.

Upon payment for the engaged services, to the extent that PM incorporates PM Intellectual Property into the Electronic Documents (which PM shall do only as expressly provided for in the accompanying engagement letter), PM grants to Client a limited royalty-free, nonexclusive, right and license to use such incorporated PM Intellectual Property for internal purposes only and in the original format. Client agrees not to copy, publish, modify, disclose, distribute, decompile, reverse engineer, or create derivative works based on PM Intellectual Property. Notwithstanding the foregoing, in no event will PM be precluded from developing for itself or for others, works of authorship which are similar to those included in the written report.

If and to the extent PM shares information obtained from third-party data sources with Client, Client agrees not to (i) disclose or redistribute any such third-party data to third parties without the express written consent of PM; or (ii) attempt to extract, manipulate, or copy any embedded or aggregated third-party data from the Electronic Documents for any purpose.

5. **Confidentiality, Ownership, and Retention of Workpapers** – During the course of this engagement, PM and PM staff may have access to proprietary information of Client, including, but not limited to, information regarding general ledger balances, financial transactions, trade secrets, business methods, plans, or projects. PM acknowledges that such information, regardless of its form, is confidential and proprietary to Client. PM will comply with all applicable ethical standards, laws, and regulations as to the retention, protection, use, and distribution of such confidential client information. Except to the extent set forth herein, PM will not disclose such information to any third party without the prior written consent of Client.

In the interest of facilitating PM's services to Client, PM may communicate or exchange data by internet, email, facsimile transmission or other electronic methods. While PM will use its best efforts to keep such communications and transmissions secure in accordance with PM's obligations under applicable laws and professional standards, Client recognizes and accepts that PM has no control over the unauthorized interception of these communications or transmissions once they have been sent, and consents to PM's use of these electronic devices during this engagement.

Professional standards require that PM create and retain certain workpapers for engagements of this nature. All workpapers created in the course of this engagement are and shall remain the property of PM. PM will maintain the confidentiality of all such workpapers as long as they remain in PM's possession.

Both Client and PM acknowledge, however, that PM may be required to make its workpapers available to regulatory authorities or by court order or subpoena in a legal, administrative, arbitration, or similar proceeding in which PM is not a party. Disclosure of confidential information in accordance with requirements of regulatory authorities or pursuant to court order or subpoena shall not constitute a breach of the provisions of this Agreement. In the event that a request for any confidential information or workpapers covered by this Agreement is made by regulatory authorities or pursuant to a court order or subpoena, PM agrees to inform Client in a timely manner of such request and to cooperate with Client should Client attempt, at Client's cost, to limit such access. This provision will survive the termination of this Agreement. PM's efforts in complying with such requests will be deemed billable to Client as a separate engagement. PM shall be entitled to compensation for its time and reasonable reimbursement of its expenses (including legal fees) in complying with the request.

PM reserves the right to destroy, and it is understood that PM will destroy, workpapers created in the course of this engagement in accordance with PM's record retention and destruction policies, which are designed to meet all relevant regulatory requirements for retention of workpapers. PM has no obligation to maintain workpapers other than for its own purposes or to meet those regulatory requirements.

Upon Client's written request, PM may, at its sole discretion, allow others to view any workpapers remaining in its possession if there is a specific business purpose for such a review. PM will evaluate each written request independently. Client acknowledges and agrees that PM will have no obligation to provide such access or to provide copies of PM's workpapers, without regard to whether access had been granted with respect to any prior requests.

6. **Consent to Disclosures to Service Providers** – In some circumstances, PM may use third-party service providers to assist PM with its services, including affiliates of PM within or outside the United States. In those circumstances, PM will be solely responsible for the provision of any services by any such third-party service providers and for the protection of any information provided to such third-party service providers. PM will require any such third-party service provider to: (i) maintain the confidentiality of any information furnished; and (ii) not use any information for any purpose unrelated to assisting with PM's services for Client. In order to enable these third-party service providers to assist PM in this capacity, Client, by its duly authorized signature on the accompanying engagement letter, consents to PM's disclosure of all or any portion of Client's information, including tax return information, to such third-party service providers, including affiliates of PM outside of the United States, if and to the extent such information is relevant to the services such third-party service providers may provide and agrees that PM's disclosure of such information for such purposes shall not constitute a breach of the provisions of this Agreement. Client's consent shall be continuing until the services provided for this engagement Agreement are completed.

7. **Third-Party Data** – PM may reference third-party data sources in performing the services described in the accompanying engagement letter. Third-party data may include publicly available data, commercially available data licensed to PM, or information obtained from other sources. PM will use its judgment, discretion, best efforts, and good faith in evaluating the use of third-party data sources, but does not warrant or guarantee the accuracy, completeness, or timeliness of any data obtained from third-party data sources and disclaims any liability arising out of or relating to the use of data from third-party data sources. Client acknowledges that any commercially available third-party data sources referenced by PM are licensed to PM and PM's ability to share information obtained from commercially available third-party data sources is often restricted by the terms of use granted to PM by the licensor and, unless expressly set forth in the accompanying engagement letter, PM makes no representation or warranty that Client will have access to data obtained from third-party data sources. If and to the extent PM shares information obtained from third-party data sources with Client, Client agrees not to disclose or redistribute any such third-party data to third parties without the express written consent of PM. This Agreement does not convey to Client a sublicense to any third-party data source unless expressly agreed to in writing and signed by a duly authorized representative of PM. However, nothing herein shall prevent Client from directly contracting with or obtaining a license from any third-party data source if Client determines, in its sole discretion, that any such direct contract or license to be in its best interest.

8. **Fee Quotes** – In any circumstance where PM has provided estimated fees, fixed fees or not-to-exceed fees ("Fee Quotes"), these Fee Quotes are based on Client personnel providing PM staff the assistance necessary to satisfy Client responsibilities under the scope of services. This assistance includes availability and cooperation of those Client personnel relevant to PM's analysis and providing needed information to PM in a timely and orderly manner. In the event that undisclosed or unforeseeable facts regarding these matters causes the actual work required for this engagement to vary from PM's Fee Quotes, those Fee Quotes will be adjusted for the additional time PM incurs as a result.

In any circumstance where PM's work is rescheduled, PM offers no guarantee, express or implied, that PM will be able to meet any previously established deadline related to the completion of PM's work. Because rescheduling its work imposes additional costs on PM, in any circumstance where PM has provided Fee Quotes, those Fee Quotes may be adjusted for additional time PM incurs as a result of rescheduling its work.

PM will advise Client in the event these circumstances occur; however, it is acknowledged that the exact impact on the Fee Quote may not be determinable until the conclusion of the engagement. Such fee adjustments will be determined in accordance with the Fee Adjustments provision of this Agreement.

9. **Payment Terms** – PM's invoices for professional services are due upon receipt unless otherwise specified in the accompanying engagement letter. In the event any of PM's invoices are not paid in accordance with the terms of this Agreement, PM may elect, at PM's sole discretion, to suspend work until PM receives payment in full for all amounts due or terminate this engagement. In the event that work is suspended, for nonpayment or other reasons, and subsequently resumed, PM offers no guarantee, express or implied, that PM will be able to meet any previously established deadlines related to the completion of PM's consulting work or issuance of PM's consulting report upon resumption of PM's work. Client agrees that in the event that work is suspended, for non-payment or other reasons, PM shall not be liable for any damages that occur as a result of PM ceasing to render services.

10. **Fee Adjustments** – Any fee adjustments for reasons described in this Agreement will be determined based on the actual time expended by PM staff at the hourly rates stated in this Agreement, plus all reasonable and necessary travel and related costs PM incurs, and included as an adjustment to PM's invoices related to this engagement. Client acknowledges and agrees that payment for all such fee adjustments will be made in accordance with the payment terms provided in this Agreement.

11. **Force Majeure** – Neither party shall be deemed to be in breach of this Agreement as a result of any delays or non-performance directly or indirectly resulting from circumstances or causes beyond its reasonable control, including, without limitation, fire or other casualty, acts of God, war, other violence, epidemic, pandemic, or other public health emergency or government mandated shut down (each individually a "Force Majeure Event"). A Force Majeure Event shall not excuse any payment obligation relating to fees or costs incurred prior to any such Force Majeure Event.

12. **Exclusion of Certain Damages** – Except to the extent finally determined to have resulted from PM's gross negligence or willful misconduct, the liability of PM and any of PM's officers, directors, partners, members, managers, employees; its affiliated, parent or subsidiary entities; and approved allied third-party service providers (collectively, "PM Persons") for any and all claims, losses, costs, and damages of any nature whatsoever is limited so that the total aggregate liability of the PM and/or the PM Persons with respect to and arising out of the services provided hereunder shall not exceed the total fees paid to PM for the services provided in connection with this Agreement. It is agreed that these limitations on PM's and the PM Persons' maximum liability are reasonable in view of, among other things, the nature, scope, and limitations of the services PM is to provide, and the fees PM is to receive under this engagement. In no event shall the PM or the PM Persons be liable, whether a claim be in tort, contract, or otherwise, for any consequential, indirect, lost profit, punitive, exemplary, or other special damages. The exclusion of certain damages as set forth in this Section apply to any and all liabilities or causes of action against PM and/or the PM Persons, however alleged or arising, unless and to the extent otherwise prohibited by law. This provision shall survive the termination of this engagement.

   In the event this Agreement expressly identified multiple phases of services, the total aggregate liability of PM shall be limited to no more than the total amount of fees received by PM for the particular phase of services alleged to have given rise to any such liability.

13. **Defense, Indemnification, and Hold Harmless** – As a condition of PM's willingness to perform the services provided for in the accompanying engagement letter, Client agrees to the extent provided by law, to defend, indemnify, and hold PM and the PM Persons harmless against any claims by third parties for losses, claims, damages, or liabilities, to which PM or the PM Persons may become subject in connection with or related to the services performed in the engagement, unless a court having jurisdiction shall have determined in a final judgment that such loss, claim, damage, or liability resulted primarily from the willful misconduct or gross negligence of PM, or one of the PM Persons. This defense, indemnity, and hold harmless obligation includes the obligation provided by law to reimburse PM and/or the PM Persons for any legal or other expenses incurred by PM or the PM Persons, as incurred, in connection with investigating or defending any such losses, claims, damages, or liabilities.

14. **Conditions of PM Visit to Client Facilities** – Client agrees that some or all of PM's services may be provided remotely. In order to facilitate the provision of services remotely, Client agrees to provide documentation and other information reasonably required by PM for PM's performance of the engaged services electronically to the extent possible throughout the course of the engagement. In the event in-person visits to Client's facility are requested by Client or otherwise determined by PM to be necessary for the performance of the engaged services, Client agrees, upon PM's request, to provide Client's policies and procedures that Client has implemented relating to workplace safety and the prevention of the transmission of disease at its facility. In addition, Client affirms that it is in compliance with applicable Centers for Disease Control and Prevention and OSHA guidance pertaining to the prevention of the transmission of disease (collectively, "Applicable Preventative Guidance") and agrees that it shall continue to comply with Applicable Preventative Guidance throughout any in-person visits by PM to Client's facility. Notwithstanding the foregoing, PM reserves the right to suspend or refrain from any in-person visit by PM to Client's facility or impose further conditions on any such in-person visit if and as PM deems necessary. Client agrees and acknowledges that any determination by PM to visit Client's facility is not and shall not be construed to be or relied on by Client as a determination by PM of Client's compliance with Applicable Preventative Guidance.

15. **Receipt of Legal Process** – In the event PM is required to respond to a subpoena, court order, or other legal process (in a matter involving Client but not PM) for the production of documents and/or testimony relative to information PM obtained and/or prepared during the course of this engagement, Client agrees to compensate PM for the affected PM staff's time at such staff's current hourly rates, and to reimburse PM for all of PM's out-of-pocket costs incurred associated with PM's response unless otherwise reimbursed by a third party.

16. **Termination of Engagement** – This engagement may be terminated by either party upon written notice. Upon notification of termination of this engagement, PM will cease providing services under the engagement. Client shall compensate PM for all time expended and reimburse PM for all out-of-pocket expenditures incurred by PM through the date of termination of this engagement.

17. **Time Limits** – Except for actions to enforce payment of PM's invoices and without limiting any claims for indemnification hereunder, any claim or cause of action arising under or otherwise relating to this engagement must be filed within two years from the completion of the engagement without regard to any statutory provision to the contrary.

18. **Entire Agreement** – This Agreement is contractual in nature and includes all of the relevant terms that will govern the engagement for which it has been prepared. The terms of this Agreement supersede any prior oral or written representations or commitments by or between the parties regarding the subject matter hereof. Any material changes or additions to the terms set forth in this Agreement will only become effective if evidenced by a written amendment to this Agreement, signed by all of the parties.

19. **Severability** – If any provision of this Agreement (in whole or part) is held to be invalid or otherwise unenforceable, the other provisions shall remain in full force and effect.

20. **Conflicts of Interest** – PM's engagement acceptance procedures include a check as to whether any conflicts of interest exist that would prevent PM's acceptance of this engagement. No such conflicts have been identified. Client understands and acknowledges that PM may be engaged to provide professional services, now or in the future, unrelated to this engagement to parties whose interests may not be consistent with interests of Client.

21. **Signatures** – Any electronic signature transmitted through DocuSign or manual signature on the accompanying engagement letter transmitted by facsimile or by electronic mail in portable document format may be considered an original signature.

22. **Governing Law** – This Agreement shall be governed by and construed in accordance with the laws of the State of Florida, and jurisdiction over any action to enforce this Agreement, or any dispute arising from or relating to this Agreement shall reside exclusively within the State of Florida.

End of Professional Services Agreement

Purchase Order

Fiscal Year	2022	Page 1 of 1

Bill To
City of Cape Coral
ATTN: City Manager Admin
P.O BOX 150027
Cape Coral, FL 33915

Ship To
City of Cape Coral
ATTN: City Manager Admin
1015 Cultural Park Blvd
Cape Coral, FL 33990

Purchase Order Number	**22503543**
Purchase Order Date	**07/12/2022**
Department	**City Manager Administration**
Required By	**09/30/2022**
Payment Terms	**30 Days**

NOTE: All invoices must indicate a valid City of Cape Coral Purchase Order Number for payment to be processed.

Vendor
P&M HOLDING GROUP LLP
DBA: PLANTE & MORAN PLLC
3000 TOWN CENTER
SUITE 100
SOUTHFIELD, MI 48075

VENDOR PHONE NUMBER	VENDOR FAX NUMBER	VENDOR NUMBER	REQUISITION NUMBER	BUYER NAME	DELIVERY REFERENCE
248-223-3447		3918	22003884	Kim M. Swartz	

NOTES

CONSULTING SERVICES
PIGGYBACK TO WEST PALM BEACH CONTRACT #18983
RFP #:16-17-205
AMENDMENT #1 18983.003
ESTIMATED COMPLETION OF CONTRACT: 10/31/2022
RATE BEYOND THE SCOPE OF WORK: $260 PER HOUR
TERM: 45 BUSINESS DAYS FROM NOTICE TO PROCEED/PROVIDING PO TO VENDOR.
SCOPE OF WORK PER OUTLINE IN AGREEMENT DATED 5/24/2022.

ITEM #	DESCRIPTION	QUANTITY	UOM	UNIT PRICE	EXTENDED PRICE
1	Computer Software Consulting EXTERNAL CONSULTING FOR ENERGOV SOFTWARE. PHASE 1 ONLY TO INCLUDE SOLUTION STABILIZATION AND OPTIMIZATION, ASSESSMENT AND RECOMMENDATION AND SITE VISIT.	1.0000	EACH	$79,475.0000	$79,475.00
	GL #: 140-23100-534120-23-54-524030-000-000- $79,475.00				

Procurement Manager

|	
Total Ext. Price	$79,475.00
Purchase Order Total	**$79,475.00**

Purchasing Copy

THE FOLLOWING TERM AND CONDITIONS SHALL BE PART IF THE AGREEMENT BETWEEN THE PARTIES TO PURCHASE ORDERS:

1. **DEFINITIONS**: the term "Vendor" as used in this order shall mean the party furnishing the goods, materials, equipment and /or services so specified herein. The Term: "purchaser" as used in this order shall mean the City of Cape Coral, Florida.

2. **TERMS AND ACCEPTABLE**: This purchase order becomes a contract (1) when signed acknowledgment is received by the Purchaser or (2) when shipment according to schedule of all or any portion of the goods covered by this purchase order shall be made or (3) when written approval is given to the Vendor by Purchaser of the price and delivery schedule of the goods as stated by the Vendor if Vendor's written acknowledgement of this order contains either (a) a different price or delivery schedule or a different type of item, or (b) no price nor delivery schedule for the item or items to which Purchaser's approval applies.

3. **FORMAL CONTRACT**: The City may require Vendor (seller) to execute a formal written contract in connection with this purchase. If there is a formal written contract, its provisions shall prevail to the extent of any conflict with these Conditions.

4. **INVOICES**: Vendor is to indicate on all invoices: purchase order number, discount, and terms of payment. Any portion of this order, which cannot be filled as specified, will not be substituted until the Purchaser has been notified, and approval in writing has been initiated.

5. **PAYMENT**: Payments may not be made to Vendor for partial shipments.

6. **SHIPPING CHARGES**: All prices will be F.O.B. delivery point. When a specific purchase has been negotiated F.O.B. shipping point, the Vendor will prepay shipping charges and add to the invoice. No charges will be honored for packaging unless so stated.

7. **RISK OF LOSS**: All goods and materials shall be subject to inspection, testing and approval by Purchaser before acceptance. The risk of loss of damage to all goods or materials shall remain with Vendor until arrival at the Purchaser's location(s). Goods or materials found to be damaged or defective or which fail to conform to the contract upon arrival at one of the Purchaser's location(s) may be rejected by the Purchaser and returned or held at Vendor's risk and expense. Purchaser may charge to Vendor all expenses of inspecting, unpacking, examining, repacking, storing, and reshipping any rejected goods. The Purchaser shall receive credit at the invoice price or at Purchaser's option, replacement for such goods or materials, but in no event will such goods or materials be replaced by Vendor without written replacement order from Purchaser.

8. **DELIVERY**: The Purchaser has the right to cancel entirely or reschedule delivery of any of the goods or materials described herein which are not delivered at Purchaser's location within the time specified.

9. **WARRANTY**: The Vendor expressly warrants that all work, goods, and materials covered by this purchase order are of the quantity, quality, material, workmanship, size, description, and dimensions specified in the applicable drawings, specifications, samples or description; and are merchantable and free from defects and that such express warranty shall not be deemed waived by reason of either the acceptable of the work, goods or materials, or the payment therefore, unless otherwise stated, and is based entirely on specifications furnished by the Purchaser. Nothing herein shall be deemed a waiver by Purchaser for any of Vendor's warranties, either express or implied.

10. **COMPLIANCE WITH THE LAW**: The Vendor will comply with all Federal, State, and local laws and regulations applicable to articles, materials or services constituting this order, and shall upon request of the Purchaser furnish such proof of compliance.

11. **INDEMNITY**: The Vendor agrees to indemnify and hold Purchaser harmless from any and all loss, cost, liability and expense(including attorney's fees) arising, growing out of, or in any way connected with, any other claim or litigation now or hereafter asserted with respect to any injury or damages resulting from or arising out of any alleged defect in the work, goods, or materials ordered herein or by reason of the design or construction thereof, and agrees to reimburse Purchaser for any and all expenses(including attorney's fees) in connection thereof.

12. **CONTROLLING LAW**: This contract shall be construed and enforced under the laws of the great State of Florida. The enumeration herein of certain rights does not exclude others which are given by law. No waiver by Purchaser of any conditions appearing herein shall be deemed to constitute a waiver of any other condition hereof or waiver of the same or any other conditions with regard to subsequent transaction, or subsequent parties of the same transaction.

13. **ASSIGNMENT**: Vendor shall not assign or subcontract any portion of this order without prior written approval of the Purchaser. If such approval is granted, it shall not relieve the Vendor from liability here under. If this order cannot be filled by person or firm to whom it is issued, it shall be returned to the Purchaser.

14. **ENTIRETY**: This order, including the terms and conditions shown herein contains the complete and final agreement between the Vendor and the City, and no other agreement in anyway modifying any said terms and conditions will be binding upon the City unless made in writing and signed by the Purchasing Agent or other authorized City representative.

Additional condition applicable in cases where Vendor is to perform work on the premises of Purchaser:

15. **INDEPENDENT CONTRACTOR**: The Vendor shall carry on said work at its own risk until the work is fully competed and accepted, and shall in case of any accident, destruction or injury to the work or materials before its final completion and acceptance, repair and replace forthwith the work or material so injured, damaged and destroyed at Vendor's own expense and to the satisfaction of Purchaser. When materials and equipment are furnished by others for installation or erection by Vendor, Vendor shall receive, unload, store and handle same at site and be responsible therefore as through such materials or equipment were being furnished by Vendor under the order.

16. **INSURANCES**: The Vendor, at his own expense, provide for the payment of workers' compensation insurance, including occupational fess, benefits to his employees employed on or in connection with work covered by this order or to their dependents in accordance with the laws of the great State of Florida. Vendor shall also carry comprehensive general liability including, but not limited to, contractual, automobile, and general liability insurance with bodily injury and death limits of at least $1,000,000 for any one person and $2,000.000 for any one accident,. Vendor's insurance protection shall expressly include its subcontractors, if any, and transportation of materials, equipment and employees by Vendor, its agents and employees of any other subcontractors, their agents and employees, to and from and at the site of the work. Subject to conditions stated herein above and with Purchaser's prior written approval, Vendor may, in compliance with aforesaid insurance requirements, submit to Purchaser appropriate riders to any of Vendor's insurance policies currently in force whereby Purchaser is included in protection afforded by such insurance. Such riders shall evidence that the "other insurance" clause if any, in the policy to which the rider refers, has been amended to permit insurance specifically in excess thereof. Before any of Vendor's or its subcontractor's employees shall do any work upon the Purchaser's premises, vendor shall furnish Purchaser with a certificate that such compensation and insurance have been provided. Such certificates shall specify the date when such compensation and insurance expires. Vendor agrees that such compensation and insurance shall be maintained until after the entire work is completed and accepted.

17. **PROTECTION AGAINST ACCIDENTS AND DAMAGES**: The Vendor hereby assumes entire responsibility and liability for any and all damage, loss or injury of any kind or nature whatever to persons or property caused by or resulting from the performance of the work provided for in this, orders or in connection therewith, and Vendor agrees that Vendor will indemnify and hold harmless Purchaser and any of Purchaser's officers, agents, and servants, from and against any claims, loss, damages, charge or expense (including attorney's fees) whether direct or indirect, and whether to persons or to property, to which Purchaser or any of said parties may be put or subjected by reason of any act, action, neglect, omission or default on the part of the Vendor any of its subcontractors, or any of Vendor's or his subcontractor's officers, agents, servants, or employees. In case any suit or other proceedings shall be brought against Purchaser at any time on account or by reason of any act, action, neglect, or omission or default by Vendor, or any of its subcontractors, Vendor, hereby agrees to assume the defense thereof and to defend the same at Vendor's own expense, and to pay any and all costs, charges, attorney's fees and other expenses, and any and all judgments that may be incurred or obtained against Purchaser and if any judgment or other lien be place upon or obtained against the property of Purchaser, as a result of such suits or proceedings. Vendor will at once cause the same to dissolved and discharged by giving bond or otherwise. Vendor and its subcontractors shall take all safety precautions and furnish and install all guards necessary for the prevention of accidents, and shall comply with all laws and regulations. Purchaser shall not be responsible nor be held liable for any damage to person or property consequent upon the use, misuse or failure of any horse, rigging, blocking, scaffolding or other equipment be furnished or lent to Vendor or to any of its subcontractors by Purchaser.

18. By accepting this Purchase Order, Vendor expressly agrees that the terms of this Purchase Order exclusively govern the relationship and agreement between Vendor and Purchaser. In the absence of a written agreement, Vendor's acceptance of this Purchase Order binds the Vendor to all the terms contained herein. This Purchase Order supersedes any other agreement or purported terms of any type, including, without limitation, the terms of any quote, order form, acknowledgement or other ordering document that may be referenced or issued by Vendor. There will be no force and effect given to any different or additional terms contained in any quote, order form, acknowledgement or similar form issued by a Vendor, even if signed by the parties and regardless of any statements to the contrary, unless such terms are included in an amendment in accordance with an agreement.

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Wealth Management.
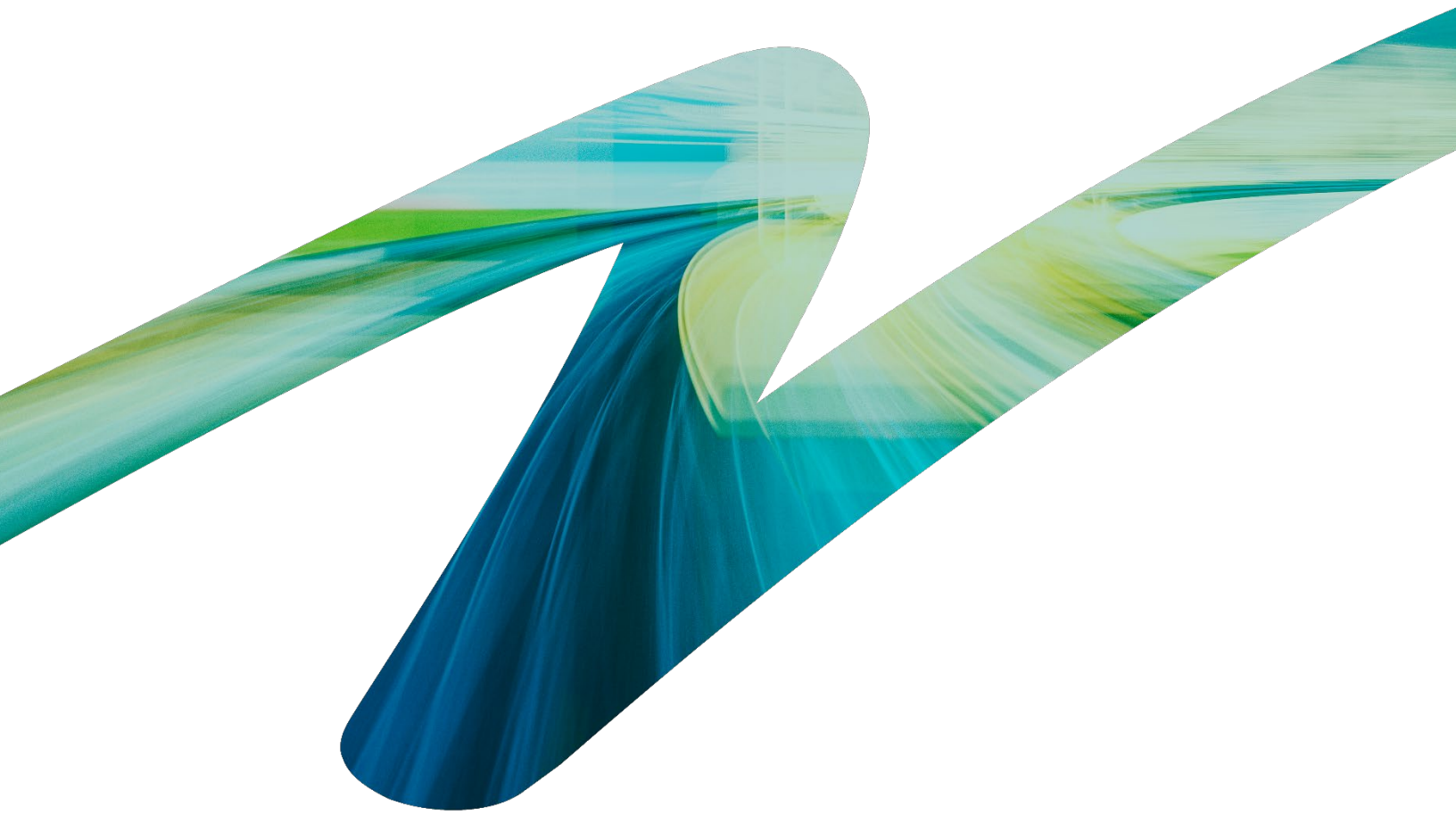
EnerGov Assessment and Plan of Action Recommendations

City of Cape Coral, FL | EnerGov Stabilization Project

Release Date: 8/23/2022

Document Version Control Reference

Document Name	City of Cape Coral FL, EnerGov Assessment and Plan of Action
Deliverable Control Numbers	1.0 – Initial Deliverable | Draft Document — Plante Moran releases initial draft to the City's Core Team for feedback and to identify specific discussion points prior to the peer community site visit with the City of Des Moines IA. 1.1 – Draft Revisions — Revisions to the report were made to identify the sequence of recommendations in the preliminary plan of action following the peer community site visit. 1.2 – Draft Revisions — Revisions were made to reflect the latest information available to support the 8/17/2022 presentation to City Council. 2.0 – Final Document — Final document prepared as part of the findings and recommendations presentation to City Council.
Document Purpose	The document represents an independent assessment of the City's implementation of the EnerGov Enterprise Permitting, Licensing, and Code Enforcement System based upon Plante Moran's analysis conducted in June and July of 2022. The assessment provides the foundation for recommendations necessary to stabilize the current EnerGov system and address performance improvements necessary to achieve the City's service level expectations.
Project Manager & Point of Contact for Revisions	Matthew Grambow, Special Projects Coordinator – City Manager's Office 239-574-0446 (Ext. 4446) mgrambow@capecoral.gov

Version	Author	Date Version Released	Purpose/Revisions	Requested Action
1.0	Plante Moran	7/27/2022	The assessment report represents the observations, assessment findings, and plan of action to stabilize the EnerGov application.	Core Team Review of the assessment observations and findings to prepare for the City of Des Moines site visit.
1.1	Plante Moran	8/01/2022	Revisions were made to reflect the latest information available following the City's Core Team Meeting with Plante Moran on 7/28/2022 prior to the City of Des Moines visit.	Core Team reference of the assessment observations and findings during the City of Des Moines site visit.
1.2	Plante Moran	8/17/2022	Revisions were made to reflect the latest information available to support the presentation with the City Council on 8/17/2022.	Core Team reference and identify necessary revisions based upon questions and clarifications provided to City Council on 8/17/2022.
2.0	Plante Moran	8/23/2022	Final deliverable	Distribute to project stakeholders, as appropriate.

Contents

Executive Summary

This document presents Plante Moran's observations and recommendations for stabilizing the City of Cape Coral's EnerGov permitting, licensing, code enforcement and land management system. This assessment is based upon Plante Moran's discovery that took place in June - August 2022. The evaluation included input from core user departments using EnerGov including Public Works and the Development Services Department including its Divisions of Code Compliance, Planning, Building, Land Development, and Business Tax Receipts & Licensing. The involvement of the City's supporting Departments, to include Information Technology and the City Manager's Office, delivered the necessary technical and project leadership services to perform the activities conducted in this assessment. City staff were forthcoming, accurate, and candid in their representation of the situation which greatly aided the analysis presented in this report.

Background

The 37-month implementation of the EnerGov system began in January 2019 was launched in February 2022. This implementation was performed in the context of the following challenges:

- The City transferred 5,000 active permits from its legacy permitting/land management system (TRAKiT) to EnerGov.
- The City completed a conversion of 620,000 permits and 3.2 million inspection results from the City's legacy system.
- The City instituted a nine (9) day hold on processing permits to clear the backlog creating significant work and impact on the City's ability to meet expected service levels.
- Immediately following the February 2022 system go-live, the City has experienced significant delays in processing single-family, residential permits.
- The City's Information Technology Team is meeting daily with Development Services Team to assess significant performance issues pertaining to EnerGov system disruptions and unplanned service outages impacting the City's ability to process permits.
- The City is currently hosting its own instance of the EnerGov 2020 version and is evaluating the upgrade to the 2021 version to mitigate adverse performance impacts.
- The City recently converted to Tyler Munis Financials after acquiring EnerGov to overcome integration challenges with the legacy JD Edwards system.
- Implementation team members from the City and Tyler Technologies, the software OEM, team experienced significant staff turnover during the 37-month implementation during the COVID-19 Pandemic.
- At present, the City continues to experience challenges to achieve customer service levels and realize expected efficiencies.
- A new staff position was recently posted within the City on July 2022 for an EnerGov Application Administrator in Information Technology Services.
- Given the expected constituent service capabilities of EnerGov, City Council has elevated the priority to stabilize the EnerGov System to achieve the expected benefits anticipated by the City's citizens and customers.

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Current-State Situation

Cape Coral is processing an unprecedented volume of activity with 50,000 permit applications and 5,000 single-family residential construction permits anticipated this year. This demand is combined with an expectation to deliver predictable turnaround times for all applicants including residential and commercial stakeholders.

A cross-disciplinary team representing leaders in the City's Development Services, Information Technology, Public Works, and City Manager's Office established a 60-Day Action Plan to address the immediate issues associated with the EnerGov implementation with the goal of stabilizing the EnerGov environment and mitigate adverse service impacts. The Action Plan included the following goals:

Goal #1: Increase permit processing speed for three high-priority permit types including:
- o Complete reconfiguration of streamlined residential and commercial roofing permit
- o Complete reconfiguration of single-family residential new construction workflows
- o Reconfiguration of workflows not involving a plan review process so they can be separated

Goal #2: Develop EnerGov optimization plan based on technology and staff process best practices within 45 business days
- o Contract with third-party EnerGov integration consultant
- o Complete third-party assessment of City implementation
- o Complete comprehensive EnerGov optimization study with Plante Moran

Goal #3: Improve City capacity to manage and improve EnerGov system performance
- o Complete a Development Services Department (DSD) staffing analysis
- o Successfully recruit an EnerGov Application Administration position
- o Improve internal processes for identifying and addressing EnerGov issues

The City's task force is committed to addressing immediate challenges and ensuring cross-departmental coordination to ensure EnerGov improvements can be managed and delivered addressing the following business needs:

- Significantly reduce / eliminate unpredicted system outages
- Effectively integrate EnerGov with the City's new Munis Financials system in October 2022
- Address customer service level deficiencies and establish ways to achieve outcomes for measurable improvement including efficiency and productivity gains
- Identify specific recommendations for the City to achieve post-go live stabilization based upon proven practices applied by peer organizations to optimize the EnerGov system
- Ensure the City's capabilities to sustain and support its EnerGov system are properly established to ensure staff training resources are available and utilized

Assessment Approach

A project charter document detailing the business goals, project stakeholders and expected outcomes is provided in Appendix C. The Charter was adopted with sponsorship from the City Manager's Office. The findings and recommendations in this report were prepared through remote interviews conducted with 40 City staff, analysis of completed questionnaires, and analysis of City documentation.

This assessment provides a post-implementation review of Tyler Technologies EnerGov permitting, land management, code enforcement, and business licensing application and its primary system integrations with Tyler Munis, Tyler Cashiering, Tyler 311, Tyler Hub, Esri GIS, EnerGov CSS, and electronic plan review using BlueBeam.

Step #1 - Complete: Conduct City Stakeholder Interviews: Conduct remote interviews with the Client's project team to determine post-implementation gaps, remaining implementation services, solution strengths, weaknesses, opportunities, and unfulfilled business needs.

Step #2 - Complete: System Implementation Assessment: During the interviews, Plante Moran reviewed the configured systems, processes, and decisions associated with the EnerGov Business Function Review Areas as outlined in the following table.
- Confirm the integration status and approach for supporting side or "shadow" systems and the development and testing of required system interfaces.
- Review and identify incomplete Tyler professional services for configuration, data migration, forms development, testing, and training services to be provided and determine if they are in-scope for Tyler's implementation contract with the City.
- Review and identify incomplete legacy data for migration.
- Review EnerGov CSS configured workflows.
- Review Bluebeam configured electronic plan reviews.
- Review managed support services provided by Tyler for the management responsibilities.

Step #3 - Complete: Peer Community Site Visit: Evaluate a peer community's deployment of EnerGov to obtain lessons learned from an on-premise system deployment similar to the scope and scale of the Cape Coral's EnerGov implementation.
- Learn from a peer community's deployment by facilitating a meeting between Cape Coral stakeholders and those from the City of Des Moines, IA to review EnerGov business functions including permitting, code enforcement, contractor licensing, and planning.
- Facilitate interactive discussions using Plante Moran's experience navigating the challenges and pain points of EnerGov implementations.
- Document meeting notes, action items, and lessons learned during the interviews.
- Incorporate lessons learned into a Plan of Action Recommendations from the Des Moines site visit completed on 8/01/2022.

Step #4 – Complete: Provide a Plan of Action presenting recommendations to address key deficiencies in the existing EnerGov deployment.
- Evaluate upgrade decisions and benefit considerations for EnerGov, MUNIS, HUB, and other Tyler integrated solutions.
- Identification of strategies to manage and stabilize the current EnerGov environment.
- Schedule and sequence specific recommendations presented from the assessment to address identified issues with near-term and long-term business needs.

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Business Evaluation Areas

EnerGov Business Evaluation Functional Areas		
EnerGov Module	**Function**	**Process**
Licensing	Business Tax Receipts	New Business Registration
Licensing	Business Tax Receipts	Business Registration Renewal
Licensing	Business Tax Receipts	BTR/Zoning Compliance (Commercial)
Licensing	Business Tax Receipts	BTR/Zoning Compliance (Home Based Business)
Licensing	Licensing	Professional Licensing
Global (County Managed)	Address Management	New Address/Address Change
Plan	Planning	Quasi-judicial Plans (Hearing Examiner)
Plan	Planning	Legislative Plans (Planning Commission)
Permitting	Planning Permits	Temporary Use Permit and Sign Permit Processes
Permitting	Building Construction Permitting	Contractor Licensing / Verification
Permitting	Building Construction Permitting	Application Intake
Permitting	Building Construction Permitting	Plan Review (by Discipline)
Permitting	Building Construction Permitting	Inspections (by Discipline)
Permitting	Building Construction Permitting	Final Approval (Certificates of Completion, Use, Occupancy)
Permitting	Parks and Recreation	Special Event Permits
Permitting	Public Works	Driveway-Resod Permit and Right-of-Way Permit Processes
Code	Code Compliance	Case Initiation, Violations, and Compliance Achieved
Code	Code Compliance	Special Magistrate Hearing Process
Code	Code Compliance	RV and Boat Permit Process
Code	Code Compliance	Abatement Performed, Liens/Assessments for Costs/Fine Recovery

Significant Assessment Findings

The following findings resent the key assessment findings captured during Plante Moran's assessment. Over 70 assessment observations, findings, and opportunities are featured in this report to substantiate the recommendations provided. As outlined in the Assessment Approach, input from 40 City staff members was received through interviews and questionnaires provided by Plante Moran's Team. City staff were professional, responsive, and committed to stabilizing EnerGov.

1. **System Underperformance and Unscheduled Outages:** Immediately after the system go-live in February 2022, the City experienced significant deterioration in system performance at different times of day and not always related to system usage. The reasons for this poor performance were reported to Tyler Technologies and Tyler responded by indicating the City would benefit from an immediate upgrade to EnerGov version 2021 as the 2020 version was found to have known performance issues after undergoing a significant code architecture change from its 2019 release. Additionally, less than 10% of Tyler customers are on v2020 or previous versions of the software. Therefore, the City is using a version that the majority of Tyler's customers have migrated from.

2. **Data Conversion Challenges Impact Operational Performance:** The City migrated 620,000 permits with fees and 3.2 million inspections from its legacy TRACKiT System. The workflows from TRAKiT could not be replicated in EnerGov and therefore, there was no immediate way to accurately determine the inspection status associated migrated permits. Over 100,000 inspections associated with open permits did not have an accurate scheduling status. This created significant difficulty for City staff to efficiently identify, prioritize, and process inspections associated with migrated permits in the new EnerGov system. The volume of outstanding inspections is believed to be one significant contributor to poor system performance.

3. **City and Tyler Staffing Turnover During EnerGov Implementation:** The EnerGov implementation was extended due to the COVID-19 Pandemic. Significant staffing turnover took place within both the City and Tyler implementation teams leading to significant gaps of understanding as to how configuration, testing, and end-user training was performed within the Development Services Department.

4. **Different EnerGov Implementation Methods Employed:** The City configured its system workflows, automations, and custom fields with widely varying levels of involvement from Tyler. In some cases, Tyler performed end-to-end configuration whereas in other business areas the configuration was jointly performed between Tyler and City staff. The differences in approaches led to different levels of understanding and knowledge between City team members involved in workflow changes spanning multiple departments. Additionally, the lack of system configuration documentation resulted in successor staff possessing an incomplete knowledge of the decisions shaping the system's original design and configuration.

5. **Current Business Users Have Limited Formal EnerGov Training:** The recent onboarding of new Development Services staff resulted in many staff not receiving comprehensive EnerGov training to perform system administration, use, and/or management activities. The absence of business user knowledge across Development Services and Public Works resulted in gaps of understanding for users to optimally configure and/or use the system.

6. **EnerGov Change Management Governance Focused on Technical Outcomes**: The City's EnerGov Change Management Governance needs to ensure system changes are viable from both a technical and business benefits standpoint. Plante Moran's review of system changes in-progress revealed that the City's business users did not define success measures for approved system changes. Therefore, there seems to be an overreliance on technical expertise being used to inform business outcomes. Plante Moran believes this is largely due to business staff leadership turnover during system implementation resulting in knowledge attrition. At present, excessive reliance is placed on IT to inform decision options. A rebalancing of IT and business acumen is necessary to ensure a clear understanding of expected business outcomes is jointly shared and owned with approved system changes.

7. **Balance Tactical and Strategic Focus**: The City is dedicating significant resources to triaging the stabilization of EnerGov including the addition of optional overtime for City staff to support activities in addition to funding a new, full-time EnerGov System Administrator. The City's Development Services Department will be closing its permitting counter on Fridays to expedite the processing of backlog permit applications. The City will also have to train new temporary staff members while maintaining service to existing customers. While the focus on short-term benefits is necessary, it is important to recognize the longer-term implications of changes so short-term workarounds are not creating adverse impacts that need to be resolved later.

Plan of Action Recommendations

Plan of Action Recommendations

The recommendations presented involve short-term and long-term investments in the people, processes, and technology to achieve the stabilization objectives identified. As technology becomes more capable to serve the public, City must deliberately plan how it introduces these capabilities, manages its resources, and evaluates the delivery of services. It must be ready to recalibrate its capabilities to meet performance expectations as technology, processes, and staffing resources change.

Themes of Proposed Recommendations

#1: EnerGov Stabilization Assessment and Plan of Action: These activities specific to identifying, prioritizing, and sequencing the actions the Plante Moran Team identified in conjunction with the Assessment Approach presented earlier in this document.

#2: Preparation for EnerGov Future Releases and Deployment: These activities are necessary to ensure the City can take advantage of the most stable and supported release available for the EnerGov Enterprise Permitting and Licensing System.
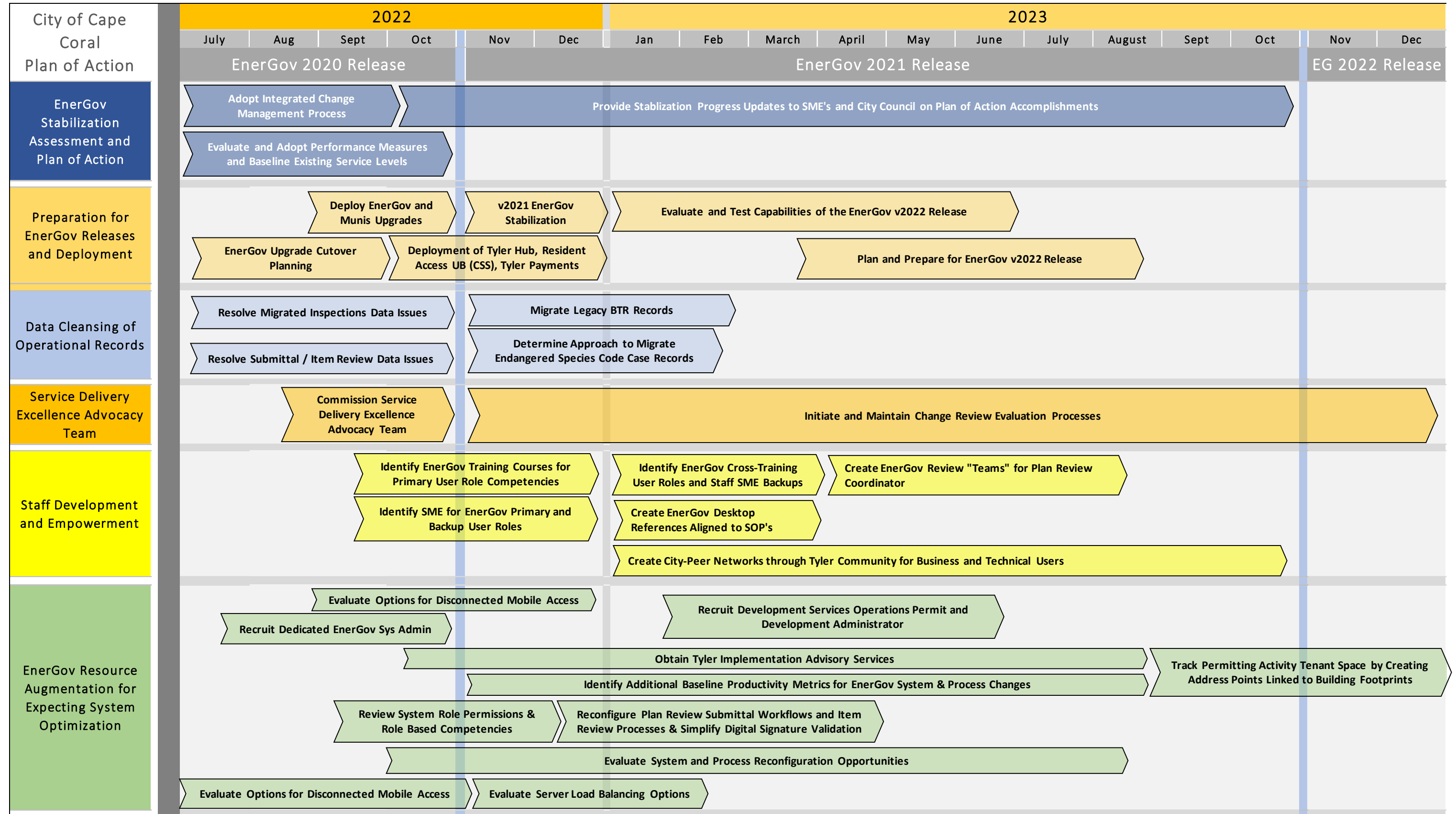
#3: Data Cleansing of Operational Records: The City converted 620,000 permits and 3.2 million inspection records from its legacy TRAKiT system to EnerGov. This conversion was complicated due to differences in the data architecture between the two systems. This meant that records from the legacy system could not be exactly replicated in EnerGov. These activities will focus on data cleansing activities so migrated records representing open and closed permits can be efficiently managed in EnerGov in the future.

#4: Service Delivery Excellence Advocacy Team: These recommendations will redefine the governance model for promoting decisions that include measurable performance outcomes that are championed by both technical and business stakeholders.

#5: Continuing Staff Development and Empowerment: The recommendations involve dedicated staff training, user role management, and user responsibilities assigned to the City's 200+ users ensuring they can administer the business functions effectively using the EnerGov system.

#6: EnerGov Resource Augmentation for Expediting System Optimization: These recommendations will accelerate system stabilization while building greater capacity for the City to mature its capability to effectively use EnerGov to respond and fulfill public service expectations.

Plan of Action Roadmap

City of Cape Coral Plan of Action	2022						2023												
	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec

EnerGov 2020 Release | **EnerGov 2021 Release** | **EG 2022 Release**

EnerGov Stabilization Assessment and Plan of Action
- Adopt Integrated Change Management Process
- Provide Stablization Progress Updates to SME's and City Council on Plan of Action Accomplishments
- Evaluate and Adopt Performance Measures and Baseline Existing Service Levels

Preparation for EnerGov Releases and Deployment
- Deploy EnerGov and Munis Upgrades
- v2021 EnerGov Stabilization
- Evaluate and Test Capabilities of the EnerGov v2022 Release
- EnerGov Upgrade Cutover Planning
- Deployment of Tyler Hub, Resident Access UB (CSS), Tyler Payments
- Plan and Prepare for EnerGov v2022 Release

Data Cleansing of Operational Records
- Resolve Migrated Inspections Data Issues
- Migrate Legacy BTR Records
- Resolve Submittal / Item Review Data Issues
- Determine Approach to Migrate Endangered Species Code Case Records

Service Delivery Excellence Advocacy Team
- Commission Service Delivery Excellence Advocacy Team
- Initiate and Maintain Change Review Evaluation Processes

Staff Development and Empowerment
- Identify EnerGov Training Courses for Primary User Role Competencies
- Identify EnerGov Cross-Training User Roles and Staff SME Backups
- Create EnerGov Review "Teams" for Plan Review Coordinator
- Identify SME for EnerGov Primary and Backup User Roles
- Create EnerGov Desktop References Aligned to SOP's
- Create City-Peer Networks through Tyler Community for Business and Technical Users

EnerGov Resource Augmentation for Expecting System Optimization
- Evaluate Options for Disconnected Mobile Access
- Recruit Development Services Operations Permit and Development Administrator
- Recruit Dedicated EnerGov Sys Admin
- Obtain Tyler Implementation Advisory Services
- Track Permitting Activity Tenant Space by Creating Address Points Linked to Building Footprints
- Identify Additional Baseline Productivity Metrics for EnerGov System & Process Changes
- Review System Role Permissions & Role Based Competencies
- Reconfigure Plan Review Submittal Workflows and Item Review Processes & Simplify Digital Signature Validation
- Evaluate System and Process Reconfiguration Opportunities
- Evaluate Options for Disconnected Mobile Access
- Evaluate Server Load Balancing Options

EnerGov Stabilization Assessment and Plan of Action

The stabilization assessment summarized in this document includes a plan of action that offers a timeline both immediate and longer-term activities necessary to be performed.

1. **Adopt an Integrated Change Management Process:** In addition to the recommendations provided, a sample change management process form is provided in Appendix A to outline the process to qualify, execute, test, and validate proposed system changes so they are successfully fulfilled.

2. **Evaluate and Adopt Performance Measures with Proposed System Changes:** The identification of performance measures to provide measures of success associated with proposed/adopted system changes are provided in Appendix B. These measures collect over 100 of the most common types of performance measures used by rapidly growing, peer communities throughout Florida and the U.S. They can be referenced to identify examples of customer success that can be used to identify incremental benefits made with each adopted system change.

3. **Create Baseline of EnerGov Performance to Measure Change Impacts:** Once a series of basic performance measures are identified, capture the current amount of time and resources necessary to produce outcomes in the existing EnerGov system configuration. The measure before and after a system change is essential to proving if business value was produced and how it can be best appreciated by stakeholders.

Preparation for EnerGov Releases and Deployment

Tyler advised the City that many of the system underperformance issues and system delays in response are related to the 2020.1 release currently being used. Tyler has repeatedly claimed that the EnerGov 2021.4 upgrade will resolve system performance issues related to its new HTML 5 platform architecture. Additionally, the EnerGov upgrade needs to be completed by November 8, 2022 to patch a security risk for EnerGov's electronic plan review integration with BlueBeam. If the EnerGov upgrade is not completed by this time, the system will apply a permanent watermark on all electronic plans current in process altering the state of all document revisions that were neither authorized or approved by City staff or the applicant's design professionals.

1. **Determine Timing of EnerGov 2021.4 Upgrade:** Due to the integration between EnerGov and Munis, which are both Tyler systems, both systems are required to be upgraded together so their versions are compatible. The upgrade to EnerGov v2021.1.4, requires the City to upgrade the authentication method used for all Tyler systems, including Munis and EnerGov. This upgrade is currently scheduled for October 3 and 4, 2022.
   o The upgrade of the authentication method affects Munis Utility Billing (UB) customers involves the re-registration of 80,000+ Utility Billing customers for the Customer Self Service portal.
   o The City expect to limit the inconvenience of asking its customers to re-register as the Customer Self Service Portal for UB was recently upgraded in February 2022 and 80,000+ customers registered on the portal during that time.
   o An immediate upgrade to EnerGov would mean the same customers would be re-registering to the portal again in less than six (6) months.

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- o There also a scheduled upgrade to Munis (including its UB module) in November 2022, which will also require all UB customers to re-register for the portal.

The following are the two decision options for the City's path forward:
- o **Option 1 – Upgrade EnerGov Prior to Munis (UB) Upgrade**
  - ▪ **Pros:** Staff users and customers that use EnerGov will be upgraded to the latest supported and stable version of the system provided by Tyler Tech. This should alleviate performance issues and system bugs in a timely manner.
  - ▪ **Cons:** An immediate upgrade to EnerGov would mean the same 80,000+ UB customers would be registering 3x times to the UB CSS portal in less than a year.
- o **Option 2 – Simultaneously Upgrade EnerGov and Munis (UB) Before Nov 2022**
  - ▪ **Pros:** No additional impact to Munis UB customers beyond the previously planned upgrade and UB CSS portal re-registration in October 2022. The City may want to time the MUNIS UB upgrade with the implementation of Tyler's new Resident Access Portal that replaces the current Munis UB CSS Portal.
  - ▪ **Cons:** Staff users and customers that use EnerGov will need to wait ~4 months for any improvements performance issues and system bugs. Also, there is a significant dependency that Munis UB upgrade will be on-time, with no project timeline slack available due to the security patch for EnerGov to BlueBeam integration required to be completed by November 8, 2022

>> Plante Moran Recommendation Option 2: Complete the EnerGov upgrade in early October 2022. Include a comprehensive public outreach and educational support program to promote resident and business awareness in advance of this transition.

2. **Perform EnerGov Version 2020.1 to Version 2021.4 Technical Cutover Planning**:
   The City will need to develop a plan and processes for the final execution of activities required to effectively transition from v2020 to v2021. Cutover tasks, as well as the roles and responsibilities and timing will need to be defined to ensure a successful transition to the new version. The City's Test environment was deployed in late July with the 2021.4 version of EnerGov. System testing should include the following details including:
   - o Custom Field Layouts and Fields are displaying data correctly
   - o Fee conditioning are applying and calculating correctly
   - o Workflows steps and actions are creating correctly
   - o Georules / automations are still working and triggering correctly
   - o Integrations between EnerGov and Tyler Cashiering, eReviews/ Bluebeam, GIS, CSS, Tyler 311, TCM, Munis
   - o CSS is still working for access and logins
   - o Production Environment smoke testing of critical functionality, data, and processes
   - o iG Enforce and iG Inspect Apps can connect and synchronizations are successful
   - o Updates for Server 2016 OS: It may also be beneficial to upgrade off of Server 2016 as it had mainstream EOS date of Jan-22 (https://docs.microsoft.com/en-us/lifecycle/products/windows-server-2016)
   - o Plan the deployment of Tyler Hub and make sure configuration and staff training is provided in advance of the deployment of these new capabilities and make sure logins to Tyler Hub and Shell are successful

3. **Perform Public Communications and Outreach in Advance of EnerGov 2021.4 Upgrade:**
   The following non-technical activities should be performed in advance of the system upgrade
   including:
   - Communication and notification to staff / public of system outage and ongoing updates
   - Communication and notification with Tyler Deployment and Tyler Support Teams
   - Post-production care support process and 'how to get help' for staff and public
   - Assess specific impacts for resolving performance issues by evaluating the 2021.4
     release is both the Train and Test environments prior to rollout in Production. Seek to
     mitigate the adverse impacts of:
     - Loss of data due to EnerGov client session timeouts.
     - Eliminate server 500 errors preventing the application from responding to a
       user request
   - Creation of duplicate invoices through the Citizen Self-Service (CSS) portal when a user
     double clicks on the submit button.
   - Evaluating escrow management capabilities to the CSS involving adding additional funds
     to existing escrow balances after an initial escrow balance is established
   - Explore EnerGov Task association to calendars new capabilities anticipated in the 2021.4
     release
   - Provide automatic notification of uploaded documents for licensed contractors

Data Cleansing of Operational Records

1. **Resolve Notification Status Errors on Migrated Inspections:** Inspections migrated from TRACKiT
   were tagged with the 1/1/2035 date involving 100,000+ inspections. Automations to manage
   these inspections do not trigger properly with this "placeholder" date and need to be identified
   so they can effectively recoded with a non-scheduled status. The impacts of this change include
   being unable to efficiently utilize native EnerGov functionality such as Inspections Schedule and
   Assign properly as well as efficiently closeout permit records due to converted inspection data
   from TrakIT (currently takes 30-45+ min to close a permit record). Over 100,000+ inspections
   were converted and set as scheduled for 1/1/2035 to hold as a placeholder tag in the open
   permit workflows.
   - Overdue inspections clean-up – Update through database scripts to complete, close, or
     cancel inspections. Any remaining overdue inspections that are unable to be scripted
     will be identified to be manually updated.
   - Scheduled inspections clean-up – Update through database script to remove scheduled
     date, and update to requested status. Disable ability to update scheduled inspections
     via CSS.
   - Permit close out process – In order to efficiently close out permit records, staff will
     update all aspects of the workflow and submit a request for a bulk update to complete
     inspections through a database script. Database script will update scheduled
     placeholder inspections and workflow actions to cancelled.

2. **Identify the Number of BTR Records Not Migrated from TRAKiT to EnerGov -** A summary report
   from TRAKiT with counts should be compared to the number of migrated records in EnerGov,
   and the exception list of those 2 reports examined. Ensure that all business are properly
   operating with a license based upon the current 2022 renewal cycle ending 10/01/2022.

4. **Determine Approach to Migrating Legacy Endangered Species Code Case Records from TRAKiT to EnerGov:** This data could either be migrated, or a report run to be manually entered depending on the number of records.

Service Delivery Excellence Advocacy Team

1. **Establish and Maintain a Service Delivery Excellence Advocacy Team:** A team consisting of a technical and business leads in Development Services, Information Technology, Public Works, and City Manager's Office would be committed to administering EnerGov system changes. It would be responsible evaluating change impacts involving both technical and business process changes so they are evaluated in terms of overall risk and benefit. The team would create a consistent process for evaluating reviews for system changes (e.g. configurations, automations, roles/permissions, etc.) so they are properly qualified, executed, tested, and validated. The team would promote continuous improvement by accepting new change requests and would communicate the rationale for adopted changes so stakeholders understand why they are being made, the reasons for the changes, when they will be effective, and whom will be impacted. A sample workflow detailing the change management and approval process is provided in Appendix A: Sample Change Request Submission.

Staff Development and Empowerment

1. **Identify EnerGov Training Courses and Competencies for all Defined EnerGov User Roles:** Request Tyler to provide the City access to Tyler University (online learning), Tyler Community (customer knowledge base), and Tyler Virtual Learning Labs providing training for system administration, configuration, GIS, and end-user training resources. Require any users submitting change requests to complete the training required of their role as a prerequisite to submitting change requests.

2. **Identify Subject Matter Experts (SME's) by User Role:** Identify staff backup roles for staff who are cross-trained in performing tasks as backups for other staff in their respective operations areas. Confirm that each SME has at least one staff backup so that continuity of service is maintained.

3. **Create EnerGov Desktop References Aligned to Standard Operating Practices (SOP's):** Many system desktop reference documents that were written at go-live are already out of date. The City's Code Compliance Division is a model for what good documentation could looks like. A "wiki" type tool may be a great suggestion for keeping an on-line, internal staff help document repository current.

4. **Define Staff Cross-Training Roles and Develop Staff Training Plans/Goals:** The City should cross-train staff and establish backups to prevent the unexpected loss of knowledge due to staff turnover and succession. Define the mandatory training necessary for staff to complete in their assigned roles to ensure operational sustainability. This training should be incorporated into defined job duties and aligned with key system functions including: system administration, configuration, upgrade (regression) testing, and GIS training is not currently defined or available to staff at present.

5. **Create EnerGov "Teams" in Review Coordinator:** Enable the City's Customer Service Representatives so they only see the activities associated with specific plan review types (e.g. residential new construction, commercial, etc.). Reducing the number of records in EnerGov's

Review Coordinator is expected to reduce system processing times currently deemed excessive and streamline internal processes so staff can focus on specific submittal types to expedite application sufficiency reviews.

6. **Create Peer-to-Peer Networks via Tyler Community:** Plante Moran's EnerGov clients frequently exchange ideas via Tyler Community to find shared approaches to solving problems. The City has not tapped the resource of peers working to fulfill their shared public service missions.

EnerGov Resource Augmentation for Expediting System Optimization

1. **Obtain Tyler Implementation Advisory Services:** The City should retain the services of a tenured EnerGov implementation consultant experienced implementing customers using the 2019, 2020, and 2021 releases to advise the City on best practices to optimize the City's configuration as it makes system configuration changes outlined in this section. The Tyler implementation consultant would provide accurate information on EnerGov's capabilities, represent best practice approaches to make configuration changes, and provide tailored training for business and technical staff.

2. **Recruit a Dedicated EnerGov System Administrator:** The scale and scope of the City's EnerGov system typically involves a dedicated, systems administrator. This staffing model effectively represented during the City of Des Moines site visit where a dedicated position was incorporated within the City's IT Team to manage and sustain the business activities supporting multiple departments. This role would be a technical lead for performing system configuration changes, adding new users, leading system training and staff development activities, and understanding departmental business process outcomes to optimally configure and manage the EnerGov system.

3. **Recruit a Development Services Operations Permit and Development Administrator:** The coordination and oversight of business processes spanning multiple Development Services Divisions is absent in the City's current operational model. The City's recent increase in total staffing resources in its three Development Services Divisions combined with the number of new, non-tenured staff will involve significant internal business process management, staff development, and coordination with internal Division Managers and Departments.

   The Administrator will provide administrative oversight to all operations and activities involving development, review, approval, permitting and inspection, and development and administration of development related codes and standards within the City. The role would provide business process oversight regarding the work performed by Department staff. It would also involve maintaining strong working relationships with other City employees, business and community groups, government officials, developers, contractors, and the public. The position would report to the Deputy Director of Development Services with leeway granted for the exercise of independent judgement and initiative. A sample job description is provided in Appendix D: Sample Permitting and Development Services Administrator.

4. **Reconfigure Plan Review Submittals and Item Review Processes –** Prioritize the reconfiguration of native EnerGov functionality such as Review Coordinator and Manage My Reviews to separate plan review activities based upon the type of workclass to expedite the validation checks for customer service representatives.
   o Review Coordinator – Update through database scripts to complete, close, or cancel overdue tasks. Any remaining tasks that are unable to be scripted to be closed will be identified for manual update.
   o Submittals and Item Reviews – Update through database scripts to clean-up Submittal dates and Item Reviews. Any remaining Submittals and Item Reviews that are unable to be scripted to be updated will be identified to be manually updated.

5. **Identify Additional Baseline Productivity Metrics for EnerGov Supported Processes:** As part of the reconfiguration, the City should capture key performance measures associated with system changes to demonstrate current service levels and intervene, where necessary, to ensure target service levels are maintained. These measures can also support decisions involving training, resourcing, efficiency, quality, customer service, and productivity. They also will demonstrate the benefits achieved as the City makes incremental changes to the EnerGov environment. Appendix B provides a listing of peer community performance measures in Florida's fastest growing communities in addition to those across the U.S.

   ▪ Plan Review Cycle Times | Time from City's determination of submittal complete to the time the City returns plan reviewer provides comments back to the applicant
   ▪ Intake to Review Coordinator | Time from application receipt to reviewer assignment
   ▪ Customer Success | First submittal success rate for application completeness
   ▪ Average number of outstanding plan reviews per plan reviewer (backlog)
   ▪ Average number of daily inspections assigned and completed by inspector
   ▪ Average number of daily plan reviews completed per plan reviewer (based upon complexity)
   ▪ Average time to issue "express permits" without plan review
   ▪ Number of online permit applications processed per day
   ▪ See example performance measures from the City of Port St. Lucie Building Department FY 2020-2025 Strategic Business Plan KPI's (pages 18 – 32)

6. **Transition System of Record for Land Records Management to GIS:** Recognize the present version of EnerGov is not designed for serving as a system to manage land division histories and will not be capable to support these activities until version 2022 at the earliest. Accessing land division histories with parcel IDs, addresses, and parcels configuration histories should be managed outside of EnerGov (e.g. the City's GIS) and referenced through EnerGov's interactive map reference toolset as a general rule.

7. **Review EnerGov's Role Based Permissions and Establish a Role-Based Training Program:** The EnerGov system roles and permissions should be reviewed as part of system testing and training activities to ensure user roles have the necessary permissions and controls to expedite the process reviews where possible. This review should also identify system training competencies

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so staff training plans are developed for each user role. All EnerGov users should be trained in their primary and backup support roles as a condition of receiving and maintaining EnerGov system access.

8. **Prioritize High Volume/Low Complexity Activities for Immediate Reconfiguration:** Permit activities that do not involve plan review with only a final inspection should be automated to the greatest extent possible using the Citizen Self-Service (CSS) online applicant portal. The City should minimize the number of staffing interactions between staff and customers. Specific types of permits for immediate consideration should include over-the-counter (OTC) and trade permits that do not require a plan review process. Applicant self-service workflows should be accommodated to enable applicants to submit permit applications, pay necessary fees, automatically receive permits, request inspections, and close out permits.

9. **Inventory all System Automations:** Create an active listing of all Intelligent Objects (IO's) and Intelligent Agent Automations (IAA's). In some cases, automations can divert system resources and offset perceived benefits. The City should evaluate each automation with the business team process owner who can speak to its functional utility and benefit(s). Additionally, these automations should be tested with each EnerGov upgrade to ensure they are functioning correctly.

10. **Simplify Digital Signature Validation on Electronic Plan Reviews:** Verifying the authenticity of digital signatures is time consuming and is not currently automated by preserving the validation through a digital certificate authority. Evaluate options to prevent the "flattening" of images to preserve the digital signature's public/private key so it can be efficiently validated by City intake and plan review staff members.

11. **Evaluate Server Load Balancing:** While Tyler did not explicitly endorse server load balancing, a load balancing conversation with technical experts from Tyler should be arranged and configuration will be specific to any Tyler application. This may provide options for the City to gain additional processing capacity during peak service demand periods.

12. **Evaluate Options for Disconnected Mobile Access:** City staff should evaluate the use of iG Enforce and iG Inspect mobile applications to supplement gaps in wireless coverage to enter data into EnerGov when performing field reviews, inspections, and code case investigations. These gaps currently present situations where field staff cannot access EnerGov at the job site and involve back-entry when users return to the office or where wireless access is available. Capturing results by hand in the field and keying them in the office creates inefficiencies that can be overcome through this process.

13. **System and Process Reconfiguration Opportunities:** The following items address opportunities that can be addressed my either making a process change to the system to match a business process or changing a business process to take advantage of an existing EnerGov process.

a. **Inventory EnerGov Reports:** Create an active report inventory with City business and technical owners so that changes to reports that represent status, performance/results, activities, etc. can be evaluated by the primary stakeholders using them to support decisions. Changes to reports should follow a change management process so their design impacts are understood prior to release. Additionally, the stakeholders using these reports can be involved in the review/signoff of the changes proposed.

b. **Transition to Complete Electronic Plan Review for all Submittals:** The City's plan reviewers are currently accepting both paper and electronic plans. A best practice approach is to adopt a fully electronic plan review workflow for all activities involving plan review (e.g. planning permits).

c. **Prevent Duplicate Payments**: Address a method for backing out duplicate payments using a method that can be managed efficiently either through EnerGov reconfiguration or through a process workaround with Finance where a refund can be separately processed against an invoice through Tyler Cashiering.

d. **RV Boat Permit Renewals:** Evaluate the current process for renewing boat permits that allows applicants to self-renew using EnerGov's CSS online applicant portal.

e. **Code Enforcement Officer Assignment:** Provide option to initially assign code officer by zone through GIS, but allow overrides to officer coverage zones. EnerGov user overrides are reverting back to default officer assignments creating confusion and rework.

f. **BTR Process Revision:** The current BTR process combines several different review disciplines that may or may not be applicable for every BTR. Breaking these review disciplines so they are separate workflows so that they can be combined or performed independently is a best practice.

g. **Evaluate EnerGov's Future Public Health Module to Support Fire Occupancy Inspections:** Fire inspectors are seeking to combine reoccurring occupancy inspections with construction inspection/permitting activities. EnerGov's Code Module is being used and options for generating "unattached" inspections to code cases and permits may be an option. However, the ideal situation is to associate non-cyclical (permitting) inspections with cyclical (reoccurring) inspections. The capabilities of EnerGov's Public Health Module anticipated for release in the 2022 release may be an option for the City to further evaluate

14. **Evaluate the Capabilities of EnerGov Version 2022:** Tyler delivers an annual release of its EnerGov software in May/June of each year. The following system enhancements and capabilities may be of interest to the City as part of its version 2022 evaluation activities as identified on the Plan of Action Roadmap.
    a. Improvements to Parcel Split Manager / Parcel Manager
        i. Copy original parcel custom fields, contact, conditions, and holds to new parcels
        ii. Process Multiple cases at once
        iii. Search "Inactive Parcels"

b. Improvements to administer case configuration
    i. Consolidate/reorganization of work classes by utilizing 'Active/ Retire' functions
    ii. Consolidate/reorganization of Custom Fields by utilizing 'Active/ Retire' functions
c. Improvements for back-office usability
    i. "Unlink" and "Unstart" options for workflow actions
    ii. Bulk updating Permits (standard fields, custom fields, statuses)
    iii. Inspection Manager Table View
    iv. Reinspection Fee directly to a Permit Record and Auto invoice re-inspection fee
    v. Escrow Accounts directly related to a specific Permit/ Plan record
    vi. Ability to limit Business License Industry Classifications within a Work Class
d. Improvements to CSS / eReviews
    i. Online Payments that don't update in back-office will automatically retry
    ii. Ability to not require all files upon resubmittal
    iii. eReviews Email – enable eReviews e-mail when files have been uploaded from CSS (not just new files)
    iv. CSS Online uploads - Files now upload before a record is created
e. Improvements to iG Inspect Mobile App
    i. Google Maps Routing
    ii. Attachment Library Filters

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15. **Create Address Points and Reference to Building Footprints for Tenant Space Permitting/Code Activity:** The association of activity tracking in tenant spaces is a necessary City business requirement for structures within multiple occupancy units. Using GIS, a tenant address-point inventory of tenant spaces that can be associated with permits by relating the address point ID's with the underlying permit numbers. The address points can be also be associated with the Lee County Florida GIS Building Footprints that can identify the underlying structures and their locations so they can be associated with issued permits. The City's Fire Department could use Esri's ArcGIS Quick Capture to acquire positions of new address points as part of its annual occupancy site visit process for tenant space inspections. These newly acquired address points can supplement the Next Generation 911 Address Points File Geodatabase maintained by the Lee County Department of Public Safety/E911 Addressing Division.
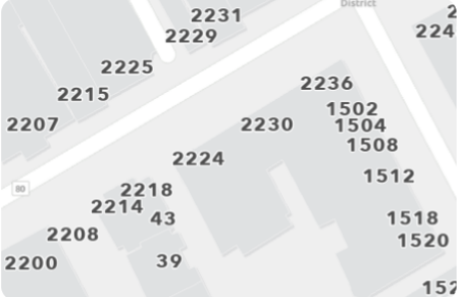
Assessment Observations, Findings, and Opportunities

Assessment Observations, Findings, and Opportunities

Observations Impacting All EnerGov Operations

The following table contains observations impacting all business areas using EnerGov. The short-term findings are intended to be activities that can be performed before the upgrade to version 2021.1.4 whereas longer-term opportunities can be performed both during and following the upgrade.

User Roles and Permissions		
Observations / Issues	**Short Term Findings and Opportunities**	**Long Term Findings and Opportunities**
URP-1: No strategic approach was utilized when setting up user roles and permissions	• Inventory of current roles and permissions; Reconcile user roles and reassign appropriately.	• Continue applying the six-month review of user roles and permissions including both the technical and business leadership.
URP-2: When setting up users, inconsistencies exist in how user roles and permissions are being applied within the same role types	• Training of user role setup. • Confirm all current user roles are consistent with expected permissions. • Establish a process to manage existing roles for City EnerGov staff members – new staff, staff position changes, and staff separations.	• Establish a process for new roles setup as part of a business and I.T. coordinated, change management process
URP-3: Several business users have elevated, admin-level privileges that may pose data-loss and incorrect system setup risks.	• Confirm all current user roles are consistent with expected permissions and are tested prior to production rollout. • Review/confirm all roles authorized to perform changes to fees, workflows, and user defined fields. • Ensure training is provided for both business and technical users possessing elevated permissions (e.g. super user, supervisor, etc.).	• Review change management processes involving the evaluation, testing, and validation of system role/permission changes.

System Infrastructure

Observations	Short Term Findings and Opportunities	Long Term Findings and Opportunities
SI-1: Sharing of Bluebeam user licenses which can complicate the ability to associated reviews with Review Coordinator since a BlueBeam Studio Prime account is also necessary for each user.	• Observe Review Coordinator and BlueBeam Studio Prime Account login processes to confirm adherence to account management and login procedures. • Survey staff to ensure licensing is adequate to meet the needs of all plan review staff members including BlueBeam Review and Studio Prime licenses.	• Evaluate and secure the necessary BlueBeam Revu and Studio Prime accounts for all plan review staff in Development Services and Public Works. • Migrate all paper-based plan reviews to electronic plan review workflows for all plan submissions to avoid co-mingling paper-based process with electronic plan review workflows.
SI-2: Current EnerGov version (v2020) is near end of support; this is causing known performance issues and has system/ functional bugs; less than 10% of Tyler customers are on v2020 or older version of EnerGov	• Upgrade to v2021/ v2022, most stable and supported versions of EnerGov application; Opportunity to take advantage of latest EnerGov product features. • Consider options for server load balancing as a possible resolution for application performance issues • Create a benefits realization matrix for all changes with 2021.4 release	• Define Tyler system upgrade and patching as part of a system evolution plan.
SI-3: Significant investment and integration of Tyler Tech suite of products across available enterprise applications	• Continue review processes of Tyler's product compatibility matrix in consultation with Tyler consultants to determine if upcoming upgrade plan(s) account for all possible impacts to existing Tyler products.	• Invest in Tyler's PACE subscription support program for access to Tyler technical training and configuration staffing resources that will provide best practices to upgrade integrated Tyler products.
SI-4: Application infrastructure has opportunities for improvement in comparison to other leading EnerGov clients	• Conduct a site visit and discussions with leading EnerGov clients with on-premise to compare infrastructure setup; Mimic best-practice setup. • Assess if Tyler's standard infrastructure recommendations are adequate for City's usage and performance requirements.	• Invest in Tyler services for annual system review that will provide infrastructure best practice reviews and recommendations for hardware setup, load balancing, nightly process and overall configuration of services. (Tyler PACE / Assist programs includes best practice reviews).

System Infrastructure

Observations	Short Term Findings and Opportunities	Long Term Findings and Opportunities
SI-5: Need for custom reports and forms, where standard reports and forms or advanced search is inadequate	• Determine and develop a prioritized list of reports and forms; Utilize in-house or third-party report developers. • Obtain SSRS report templates from peer communities (Doral FL) documenting system configuration and automation setup.	• Develop SSRS report specification and development competency and skills within the City's I.T. and business teams so the City is self-sufficient in managing the volume of report development and data query requests from staff.
SI-6: Attachments data conversion is incomplete, which is causing confusion during processing or referencing of converted records (during the duration of the assessment, the data conversion has gone from 34% complete to near 100% complete)	• Provide continued awareness to the User Community of Attachments data conversion until fully complete; Continue to provide TRAKiT as a referenceable system until conversion is complete.	• Estimate the timeframes necessary to complete or close migrated records from TRAKiT to manage end-user expectations. • Review conversion errors and exceptions and create path to resolution and completion for each item.
SI-7: Migrated records involving electronic plan review are not effectively managed by Review Coordinator since Go-Live. This is blocking ability to transition to fully digital submission process	• Determine clean-up process, possibly through scripts and manual processing. • Establish transparency for Review Coordinator workflow status using Tyler Hub with 2021.4 release.	• Tag migrated records so they can be identified for in-process workflows and managed.
SI-8: Lack of awareness of IVR system	• Perform full test of IVR system with all groups; Educate staff of IVR as an additional channel for applicants / contractors to request inspections.	• Track usage of IVR on a periodic basis to determine ROI (Tyler Tech is recommending Cities not utilize IVR any longer and only process inspection requests through Civic Access).

System Reporting and Decision Support

Observations of Issues	Short Term Findings and Opportunities	Long Term Findings and Opportunities
SRDS-1: System Admins, who have the most knowledge to administer EnerGov are not provided adequate bandwidth to fully support the support and	• Reprioritize System Admin non-EnerGov responsibilities to free up bandwidth to adequately support the needs of the system.	• Hire or reassign 1-FTE that is solely dedicated to administering EnerGov. Additionally, provide part-time support

System Reporting and Decision Support		
Observations of Issues	**Short Term Findings and Opportunities**	**Long Term Findings and Opportunities**
improvement needs of the system and the City's user community		from a DBA, GIS Analyst, and Infrastructure/ Network Analyst.
SRDS-2: Department SME's are being asked to supplement System Admin responsibilities. However, they lack skill, expertise, ongoing training, and desire (i.e., I'm being told to do this, but it's not in my job role) to support the EnerGov system	• Supplement support and administration with third party services to address immediate support and improvement needs (Tyler PACE, Plante Moran).	• Department SMEs should be identified and required to review IT System Admin activities. • Create a Department SME program that define roles, responsibilities, and operations and support processes. • Create a continuous learning curriculum including onboarding, core admin training, and continuous training (new features and refreshers). • Recruit a Permit and Development Administrator in Development Services responsible for the process coordination and oversight of process changes spanning all Dev Services Divisions.
SRDS-3: Lack of awareness of system enhancements and changes by User Community	• Review communication cascade and identify communication bottlenecks; Add system enhancements and changes to FAQ page.	• Increase communication channels; periodically, provide an opportunity for an all-staff forum for announcements, feedback, questions, etc.; Establish an ongoing communication campaign/ strategy.
SRDS-4: Lack of awareness of Tyler Tech support and educational resources	• Signup for Tyler Community, Tyler University, Florida User Group, Tyler Connect; Establish internal communication channel. • Distribute information to IT staff, SMEs and Process Owners.	Provide continued awareness to IT staff, SMEs, and Process Owners.
SRDS-5: Lack of educational curriculum for internal staff	• Establish curriculum based on Virtual Lab trainings available through Tyler U; Reprioritize System Admin non-EnerGov responsibilities to	• Provide path to certification and investment in live training, attendance to Tyler Connect; Provide in-house staff

System Reporting and Decision Support

Observations of Issues	Short Term Findings and Opportunities	Long Term Findings and Opportunities
	free up bandwidth to adequately support training needs.	person that will own delivery of City-owned EnerGov training curriculum.
SRDS-6: Varying staff understanding of EnerGov system capabilities and functionality; Complaints that out-of-the-box system functionality is not meeting expectations	• Provide refresher training and level-setting of what the EnerGov system can and cannot do. • Provide a path to post to Tyler Community for enhancement requests from the User Community.	• Provide continued product education to staff. • Continue to encourage IT staff, SMEs, and Process Owners to post to Tyler Community.

GIS/Addressing Operations

Observations of Issues	Short Term Findings and Opportunities	Long Term Findings and Opportunities
GA-1: Parcel Split / Merge Management is not being managed actively and staff is not adhering to established processes; Since Go-Live, no updates have been performed on newly created records, impacting integrity of spatial records	• Perform updates of records to ensure data remains current/ up-to-date. Staff to begin adhering to established processes to keep data up-to-date. • Test Parcel Split Management functionality in v2021 Test environment; Review webinars, training, and Tyler Community (release notes) of functionality in v2022.	• Upgrade to v2022 to enable advanced Parcel Split Manager functionality including copying original permit custom fields, processing multi cases instead of one-by-one, and searching inactive parcels with associated records.

Observations by City Operational Department

The following table contains key observations from each of the City operational process areas using EnerGov. Short term recommendations should be considered as immediate considerations for action. Long term recommendations should be completed following the upgrade to version 2021.1.4.

Building Construction Permitting		
Observations	**Short Term Recommendations**	**Long Term Recommendations**
B-1: Concerns regarding too many screens and clicks to perform activities efficiently	• Review case type setup, workflows, and custom fields and make required improvements to configuration • Re-train on EnerGov and provide tips and tricks to better use and navigate.	• Identify the most redundant activities and determine if they are performed in the most efficient way.
B-2: Applicants are choosing the wrong permit type/ workclass and once they begin they cannot "undo"	• Add to website, Civic Access, and type with more detailed instructions. • Refine back-office process; may be able to utilize linked case creation in workflow if new corrected record needs to be created by staff.	• Continue to refine instructions for the public; Procure and enable Decision Engine as a supplement.
B-3: Unable to extract data that is needed (e.g., how many different types of res, comm units, etc.)	• Create new standard advanced search, if data is available; Develop custom reports/ forms for data extracts that are not available through advanced search.	• Develop SSRS report specification and development competency and skills within the City's I.T. and business teams so the City is self-sufficient in managing the volume of report development and data query requests from staff.
B-4: Creating a separate queue for 'hot items' (e.g., elevation cert)	• Review business process and determine if Review Coordinator, Advanced Search, automations, and/or custom report will provide visibility/ notification of 'hot items'.	• Identify all permit types that are highly standardized and low complexity to either automate or setup for customer self-service.
B-5: Desire to go full digital submission	• Provide staff training and onboarding on Bluebeam; Clean-up Review Coordinator; Review of Tyler Tech best-practice process for digital submissions; Determine project charter, plan and timeline to achieve full digital submission.	• Design and deploy full digital submission for all plan submissions. • Define required docs and file categories / attachments. • Align staff roles and operations to digital submission process.

Building Construction Permitting

Observations	Short Term Recommendations	Long Term Recommendations
B-6: Flattening issue with Bluebeam Uploads into EnerGov where the seal / approval signature is being removed	• Review EnerGov Bluebeam setup and best practices from leading clients. • Evaluate settings for flattening attachments and specify the option for "no" flattening for document types containing digital signatures until it passes into CRM.	
B-7: Escrow releases (refunds) and additions to Escrows once established are unable to be processed through EnerGov	• None – City staff previously reviewed Tyler's recommendations of a workaround process in the 2021 version of EnerGov, but was found to be inadequate for City's operations.	• Upgrade to v2022 is required for these capabilities and they will need to be fully tested for validation.
B-8: Schedule and Assign functionality is not working properly and not providing adequate information without navigating to multiple pages	• Supplement functional gaps with custom reports that can provide a single view of inspection data. • Provide re-training on how to use Schedule and Assign functionality. • Clean-up of future dated converted inspections (1/1/2035) for over 100k upcoming inspections by database scripting, if possible. • Clean-up of overdue, today, and requested inspections by database scripting and/or manual updates.	• Test v2021 if filtering functionality is fixed.
B-9: Unable to efficiently process and closeout permit records due to converted inspection data that are serving as curated placeholders for each record from TrakIT (100,000+ inspections were converted and set as scheduled for 1/1/2035 until the applicant reschedules the inspection to the applicable date)	• Determine if database intervention can be performed to clean up legacy inspections since they have incorrect statuses.	• Determine the anticipated amount of time for legacy records and their inspections to remain open. This should become less problematic as legacy records are closed out.

Building Construction Permitting

Observations	Short Term Recommendations	Long Term Recommendations
B-10: High staff turnover and new employee onboarding	• Provide refresher training and reviews to ensure consistent system processing; Establish a QA process for permit data entry.	• Establish a standardized onboarding and training process. • Establish consistent system refresher training and reviews. • Develop QA reports to determine processing and data gaps.
B-11: Ability to prevent duplicate permits from being issued	• Review business process and determine if an automation and/or hold would be applicable. • Create a custom report that 'flags' permits with possible duplicate Permits for the same property.	• Provide customer education resources to identify all current submittals to prevent the submission of duplicate permits.
B-12: Reconfiguration of permit types, workclasses, and workflows (i.e., split and consolidation of existing configuration including residential and marine permits)	• Review business processes and create or consolidate case type / workclass, and associated workflow template, fee template, and custom field layout.	
B-13: Lack of awareness of Tyler support and educational resources	• Signup for Tyler Community, Tyler University, Florida User Group, Tyler Connect; Establish internal communication channel. • Explore a subscription to the Virtual Learning Labs for access to current materials.	• Establish a learning pathway for each EnerGov user role and link their learning objectives to their job duties. • Require all new users to successfully complete EnerGov training within the initial 180-days of their employment.

Building Inspections

Observations	Short Term Recommendations	Long Term Recommendations
BI-1: Inefficient experience of utilizing the full application in the field; unaware of iG apps being available to users	• Upon every upgrade opportunity, evaluate iG apps for building inspectors; Review functionality of the iG apps and determine processes when best to use the full application vs iG app	

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Building Inspections

Observations	Short Term Recommendations	Long Term Recommendations
BI-2: Chief inspector cannot see inspections once assigned	• Assign the chief inspector to all inspection teams to see status of inspections following assignment.	• Increase usage in HUB Configuration and Schedule and Assign Module to provide transparency in inspection management capabilities.
BI-3: Inspections on legacy migrated records are not sequenced correctly	• Identify legacy inspections that were migrated and scheduled, reconfigure inspections by adding all by default and removing them, or hiding all of them and only adding the necessary inspections.	• Evaluate Best Management Template options and test/explore several different methods.
BI-4: Failed inspection results in EnerGov creating automatic reinspections – the version of the inspection cannot be identified	• Continue to work with staff to review workflow configuration to ensure workflow action settings are configured correctly. • Flag all of the scheduled inspections assigned with a placeholder date of 1/01/2035. • Query scheduled inspections from system using SQL statements and reports to determine those past due.	
BI-5: Varying staff understanding of EnerGov system capabilities and functionality; Complaints that out-of-the-box system functionality is not meeting expectations	• Provide refresher training and level-setting of what the EnerGov system can and cannot do. • Provide a path to post to Tyler Community for enhancement requests from the User Community.	

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Building Inspections

Observations	Short Term Recommendations	Long Term Recommendations
BI-6: Schedule and Assign functionality is not working properly and not providing adequate information without navigating to multiple pages	• Test v2021 if filtering functionality is fixed. • Supplement functional gaps with custom reports that can provide a single view of inspection data. • Provide re-training on how to use Schedule and Assign functionality. • Clean-up of future dated converted inspections (1/1/2035) for over 100k upcoming inspections by database scripting, if possible. • Clean-up of overdue, today, and requested inspections by database scripting and/or manual updates.	
BI-7: Some inspections are not providing the ability for a reinspection	• Continue to work with staff to review workflow configuration to ensure workflow action settings are configured correctly.	
BI-8: Provide ability to be able to provide reminder comments for an upcoming inspection	• Review business process and determine if this should be indicated on the inspection level (inspector comments in past or future inspection) or permit level (alert hold, internal notes, activity, etc.). • Continue to provide awareness, training, and re-enforcement of go-forward process.	
BI-9: Provide ability for information from reviews to be available for inspections	• Review business process and determine best place to capture review data pertinent for inspectors (internal notes, review comments, attachments, etc.).	
BI-10: Unaware of how to access Owner information of the permit	• Provide training of accessing Owner Information from the Inspection and the Permit record. • Provide walkthrough of both back-office and iG.	
BI-11: Unaware of how to best utilize Advanced Search for data needs	• Provide walkthrough of Advanced Search. • Setup saved searches of common data needs.	

Building Inspections

Observations	Short Term Recommendations	Long Term Recommendations
BI-12: Concerns around inspection time stamping	• Provide walkthrough of time stamping of inspections and how to update as needed.	
BI-13: Reporting capabilities are not fulfilling expected requirements and system wide reports are not meeting information required of industry groups	• Review BMT reports and report parameters so they can be evaluated by Tyler or independently configured by the City. • Track and review report, data query, and form template requests and determine a plan for development.	

Contractor Licensing Certification / Validation

Observations	Short Term Recommendations	Long Term Recommendations
CLC-1: Applicants are choosing the wrong type/ workclass from Civic Access	• Add to website, Civic Access, and type with more detailed instructions. • Refine back-office process; may be able to utilize linked case creation in workflow if new corrected record needs to be created by staff.	• Continue to refine instructions for the public; Procure and enable Decision Engine as a supplement.
CLC-2: Certifications cannot be put directly into Contact from Civic Access	• Educate staff on best practice process for applicants and staff within current EnerGov functionality. • Log enhancement request in Tyler Community for direct certification entry when applicants are creating contacts.	• Explore EG 2021 capabilities to support record change permissions available to subcontact records.
CLC-3: No notification to staff when hold is applied to record for more information needed from applicant (IT was recently asked to disable a similar type of notification)	• Investigate if automation or custom script from database to notify staff is required. •	
CLC-4: Omnibar Search is not returning the precise results we need	• Setup saved Advanced Search queries for common searches; create a direct hyperlink for quick navigation.	

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Planning Permits

Observations	Short Term Recommendations	Long Term Recommendations
P-1: Record types not fully built out	• Verify business process and create new case type/ workclass, and associated workflow template, fee template, and custom field layout.	
P-2: Not familiar with Hub functionality	• Retraining on capabilities of what is currently available through the Hub.	
P-3: No Planning Permits were ever online	• Review examples from other Cape Coral online processes and best practice EnerGov clients' online Planning Permit processes. • Add to website, Civic Access, and type with more detailed instructions. • Refine back-office process; may be able to utilize linked case creation in workflow if new corrected record needs to be created by staff.	• Continue to refine instructions for the public; Procure and enable Decision Engine as a supplement.
P-4: Issues of performing and assigning reviews in EnerGov	• Education of proper usage of Manage My Review screens. • Review role permissions to re-assign reviewers and access to Review Coordinator.	
P-5: Converted contacts data gaps	• Review TRAKiT data extract and compare to data in EnerGov. • Determine if any direct database intervention is possible to populate missing contact records.	
P-6: Varying staff understanding of EnerGov system capabilities and functionality; Complaints that out-of-the-box system functionality is not meeting expectations	• Provide refresher training and level-setting of what the EnerGov system can and cannot do. • Provide a path to post to Tyler Community for enhancement requests from the User Community.	
P-7: Lack of awareness of Tyler Tech educational resources	• Signup for Tyler Community, Tyler University, Florida User Group, Tyler Connect; Establish internal communication channel.	

Code Compliance

Observations	Short Term Recommendations	Long Term Recommendations
C-1: Date fields not being entered correctly, or at all	• Perform QA to identify code cases that do not have date fields entered correctly or are blank; Update applicable code cases fields. • Train users and reenforce processes on how to fill out dates properly on code cases.	• Perform periodic QA reviews and monitoring of code case data and provide training and reinforcement of processes to resolve data quality issues.
C-2: RV and Boat Permits to prevent issuing multiple permits within a certain parameter of days	• Investigate ability to apply a Contact hold for a certain permit type and an automation that releases the hold based on certain number of days after permit issuance. • Create a custom report that 'flags' contacts with multiple RV/ Boat Permits issued within the parameter of days (recommendation has been implemented).	
C-3: Inspector to Zone Mapping is not working properly	• Review GIS Layer setup and Zone Assignment configuration in EnerGov (recommendation has been implemented).	• Perform periodic review of GIS Layer setup and Zone Assignment configuration in EnerGov with IT and Department SMEs.
C-4: Tasks not viewable in Calendar	• N/A	• Upgrade to v2022 should have the ability to view Tasks in the Calendar.
C-5: Ability to Email or Notify a Code Officer within EnerGov (e.g., phone call to front office to reach out to the code officer)	• Review business process and determine if tasks, automations, and/or inspections would be appropriate solutions.	
C-6: Code Case Details Reports needs update to accommodate Internal Notes	• Update report query and template to pull in Internal Notes.	
C-7: Ability to notify Environmental Specialist of Native Species Restrictions notification	• Review business process and determine if an alert hold, task, and/or automation would be appropriate solutions.	
C-8: Low confidence in the system to save the record in the field due to spotty wireless service in some areas of the City.	• Investigate using iG Enforce or iG Inspect, both have offline mode if there is no data connectivity it still has the ability to retain information captured in the field.	

Currently use word doc in the field to copy and paste case / inspection notes to not lose work		

Fire Prevention

Observations	Short Term Recommendations	Long Term Recommendations
F-1: Annual Inspections need to be tracked in EnerGov	• Investigate feasibility of utilizing Business License or Parcel Module. • Review enhancement coming in v2022 with the Environmental Health module.	• Upgrade to v2022 and enable Environment Health module.
F-2: Adding multiple violations into a Code Case at one time	• Review list of Codes and Violation Letter templates to further organize and consolidate Code inventory to streamline violations being added to Code Cases.	
F-3: Stand-alone inspections in Code Module	• Review current process managed through Code Module and determine if all process needs are addressed in the module or if a different module is more appropriate.	

Business Tax Receipting and Professional Licensing

Observations	Short Term Recommendations	Long Term Recommendations
BTR-1: Increased volume of processing Zoning Compliance. Seeking a more efficient way due to the thousands of new home-based businesses that need to be reviewed	• Review Zoning Compliance business process. • Update applicant instructions and custom fields where applicant may be able to supplement data entry. • Update back-office workflow and custom fields to determine if a more efficient layout would expedite processing.	
BTR-2: Email Automation is erroneously firing for Home-based businesses	• Verify business rules and conditioning on the email automation (recommendation has been implemented).	
BTR-3: BTR workflows have redundant steps	• Review applicable workflow business processes. • Consolidate workflow steps and actions.	
BTR-4: BTR, Fire, and Zoning are working within the same workflow	• Review appliable workflow business processes. • Separate workflows into separate case types > workflows as appropriate.	• Create SOPs to ensure new process and steps are being followed.

Business Tax Receipting and Professional Licensing

Observations	Short Term Recommendations	Long Term Recommendations
	• Separate case types to be setup with linked records back to main BTR record.	
BTR-5: Applicants are choosing the wrong required fields from Civic Access; Also, lack awareness on how to navigate, apply, interact, and renew.	• Add to website, Civic Access, and type with more detailed instructions. • Refine back-office process; may be able to utilize linked case creation in workflow if new corrected record needs to be created by staff.	• Continue to refine instructions for the public; Procure and enable Decision Engine as a supplement. • Create instructional guides/ videos for the public.
BTR-6: Contacts associated to the record can be changed by the public	• Educate public to not change contacts. • Investigate leveraging Sub-Contacts. • Review Contacts update permissions in Civic Access.	• As part of the EnerGov User committee, establish a regular agenda discussion topic to clean-up and manage contacts.
BTR-7: Daily operational reports and QA reports are not available in EnerGov	• Develop prioritized list of reports. • Create specs and develop reports in prioritized order.	
BTR-8: Managing failed BTRs are performed mainly outside of the system	• Review business process and determine EnerGov code case setup to track violation and resolution activities; then be linked to a BTR application.	
BTR-9: Varying staff understanding of EnerGov system capabilities and functionality; Complaints that out-of-the-box system functionality is not meeting expectations	• Provide refresher training and level-setting of what the EnerGov system can and cannot do. • Provide a path to post to Tyler Community for enhancement requests from the User Community.	
BTR-10: Data Conversion from legacy system to EnerGov resulted in data anomalies that were not very well tested. Problems identified are mainly with status designations under review / on hold businesses. discuss the desired expectations/outcomes of the data conversion from the business side.	• Discuss the desired expectations/ outcomes of the data conversion from the Departments. • Review what converted records have not been updated and determine a data clean-up approach.	

Development Services Permits (Civil Construction)

Observations	Short Term Recommendations	Long Term Recommendations
DS-1: Order of operations of eReviews is very redundant	• Retraining of eReviews process to ensure best practice flow is being followed.	
DS-2: Unable to efficiently process and closeout permit records (30+ min to close out) due to converted inspection data that are serving as curated placeholders for each record from TRAKiT (117,000+ inspections were converted and set as scheduled for 1/1/2035 until the applicant reschedules the inspection to the applicable date)	• Determine if database intervention can be performed to clean up legacy inspections since they have incorrect statuses; possibly combine with workflow priority reconfiguration.	
DS-3: Erosion control partial inspections are not being closed out	• Verify setup of inspection types and workflow are correct. • Retrain inspectors of closing (passing) inspections.	
DS-4: For converted records for eReviews, uploading of documents in every file category is required	• Determine best practice process and if database intervention can be performed to clean up legacy records.	
DS-5: Certifications cannot be put directly into Contact from Civic Access	• Educate staff on best practice process for applicants and staff within current EnerGov functionality. • Log enhancement request in Tyler Community for direct certification entry when applicants are creating contacts.	
DS-6: Ability to initiate Public Works workflow	• Verify business process and perform permissions / workflow updates.	
DS-7: Lateral ROW Permit	• Verify business process and create new case type/ workclass, and associated workflow template, fee template, and custom field layout.	

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Public Works Permitting and Inspections

Observations	Short Term Recommendations	Long Term Recommendations
PW-1: Block and Lot for Permits to transition away from current manual process; This was not brought over from TrakIT nor is it maintained in EnerGov	• None – City has utilized data from Leepa to the ownership layer in the description field.	
PW-2: Inefficient experience of utilizing the full application in the field with significant re-entry of records recorded by hand from the field; some staff were unaware of iG apps being available to them	• Setup iG apps for building inspectors; Review functionality of the iG apps and determine processes when best to use the full application vs iG app.	• Evaluate application persistence capabilities used by the City of Doral FL (NetMotion) as an option to optimize the field experience.
PW-3: Communication between inspectors and contractors needs to be improved on CSS	• Provide education to inspectors and contractors of public view of inspection notes information; Determine if configuration of user permissions and/or field setup is required.	• Provide education outreach and survey feedback to improve user experience. • Provide stakeholder training workshops to include an inspection training course.
PW-4: Varying staff understanding of EnerGov system capabilities and functionality; Complaints that out-of-the-box system functionality is not meeting expectations	• Provide refresher training and level-setting of what the EnerGov system can and cannot do. • Provide a path to post to Tyler Community for enhancement requests from the User Community.	• Provide training using a defined EnerGov learning pathway for EnerGov system roles assigned to Public Works staff.
PW-5: Issues of performing and assigning plan reviews in EnerGov	• Education of proper usage of Manage My Review screens. • Review role permissions to re-assign reviewers and access to Review Coordinator role. • Investigate whether existing role permissions may be restricting access to the capability to reassign plan reviews in EnerGov.	• Review the Building Department's plan review process and role permissions.

Public Works Permitting and Inspections

Observations	Short Term Recommendations	Long Term Recommendations
PW-6: No notifications for cancelling / rescheduling Inspections	• Investigate creating an automation for cancelling inspections. • Determine feasibility of data clean-up scripting options of converted Inspection records with 1/1/2035 in Scheduled Date field to then enable ability to prevent same-day rescheduling / cancellations. •	
PW-7: Civic Access duplicate contacts	• Continue to follow-up with staff owning contacts merge responsibilities of progress and activities. • If this function is to be extended to other staff, provide onboarding and training to emphasize importance of contacts linkage and active contacts management.	• As part of the EnerGov User committee, establish a regular agenda discussion topic to clean-up and manage contacts.
PW-8: Duplicate/multiple submittals and open tasks because they are left hanging and never completed through the process.	• Determine if direct database intervention can be done to close completed submittals that still show 'in progress'.	
PW-9: Permit review coordinators have to jump between Permit Review and Manage My Review screens to locate markups and corrections.	• As a best practice, enter comments into BlueBeam in conjunction with markups whenever possible. This will make the information easier to locate for both City and applicant/contractor staff.	• Evaluate options to synchronize electronic plan review comments between Permit Review in EnerGov and in BlueBeam as a future enhancement. This capability exists in EPR software competitors to BB.

Appendix A: Sample Change Management Request Form

Change Request Submission Form

This section must be filled out prior to submitting the change request to City's Change Control Team as part of the City's IT Change Control Standard Operating Procedures.

Change Request Number Assigned by Change Coordinator		
Originator: *the name of the person requesting the change*	Click or tap here to enter text.	
Date submitted: *enter the date the CR was submitted*	Click or tap to enter a date.	
Priority of Request *Urgent = stopping work* *High = needs attention* *Medium = can be combined with others* *Low = no impact to operations*	☐ Urgent ☐ High ☐ Medium ☐ Low	**Describe reason for priority:** Click or tap here to enter text.
Change description: *describe the triggering event that initiated the need for a change* Click or tap here to enter text.		
Business Justification and Reason(s) for Change (CR): *describe the reason for the Change Request (CR) including the business justification. Why is the change needed? What is the impact if the change is not implemented?* Click or tap here to enter text.		
Performance Measure(s): *How will the improvements for the change be measured? What is the current baseline of performance measure? How will incremental changes be measured from this baseline? How will these changes be communicated to business stakeholders during after the defined change has been validated to be in production? What is the anticipated level of effort to capture the measure and how often will it be reported to stakeholders?*		
Click or tap here to enter text.		
Expected Decision Date Requirement: *enter the date a decision is needed to implement the CR, if needed (Optional)* Click or tap to enter a date. **If required, enter a reason why the change approval is required by that date.** Click or tap here to enter text.		

Change Impact Summary

Select and describe every component of the program potentially impacted and enter reason.	
Organizational Impact	Click or tap here to enter text.
☐ *Contract change required?*	Click or tap here to enter text.
☐ *Payment schedule change?*	Prefer a signed agreement that recognizes
☐ *Scope impact?*	Click or tap here to enter text.
☐ *Schedule impact?*	Click or tap here to enter text.
☐ *Budget impact?*	Click or tap here to enter text.
☐ *Resource impact?*	Click or tap here to enter text.
☐ *Risk impact?*	Click or tap here to enter text.

Impact to other areas: *list and describe impacts for departments using Energov and to non-EnerGov systems, or policies potentially affected by the change.*

Click or tap here to enter text.

Impact of not making the change: *describe the impact of not making the requested change.*

Click or tap here to enter text.

Estimated effort: *the estimated effort, in hours or dollars, to complete the change including the number of hours for each impacted organization listed above.*

Click or tap here to enter text.

Additional documentation: *list and/or attach any additional information that supports this requested change.*

Click or tap here to enter text.

Department Head Approval

Date: *date presented to approval authority*	Click or tap to enter a date.
Decision: *the outcome of the change request*	Choose an item.
Notes (optional): *list any relevant notes or information related to the decision made by the approval authority, such as, deferred, escalated, by whom, to whom, reasons, next steps.* Click or tap here to enter text.	

EnerGov System Administrator Review

System Analyst Reviewer Name:	Date:			
Require EnerGov CRM Ticket?	☐ Yes	☐ No	**City EnerGov CRM Contact**	Click or tap here to enter text.
Require Change Request?	☐ Yes	☐ No	**Change Request Number**	Click or tap here to enter text.
Environment(s) impacted by change			**Describe environment impacts**	
☐ TRAIN ☐ TEST ☐ PROD			Click or tap here to enter text.	
Governance approval authority: *what is the appropriate level of governance for this change request?* ☐ Business Owner ☐ Department Head(s)				

Appendix B: Sample Peer Organization Performance Measures

Performance Measures and KPIs Adopted by Cape Coral's Peer Communities

Performance measures and key performance indicators (KPIs) are crucial for increasing efficiencies and effectiveness of business processes within City. Through measuring outcomes, organizations can identify areas for, and pursue, improvements. In the absence of such measurements, organizations cannot gauge their performance objectively and this results in other less accurate measures like perception driving the City's reputation as a high quality, professional agency committed to protecting its citizens.

The City of Tampa, Florida's Development and Growth Management Construction Services Dashboard (https://www.tampa.gov/metrics) offers an excellent model of operational performance management using Key Performance Indicators (KPI's) in addition to its statistical activity analyses.

Since organizations and people tend to manage what they measure, the use of performance measures enables organizations to represent its current-state and identify options to achieve a desired future state. This provides a planning tool for identifying continuous improvement and objectively measure progress toward achieving actual improvement.

Figure E-1 shows a hierarchy for determining indicators to measure. This hierarchy, referred to as a cascading system in a performance management framework, aligns community needs with staff performance measures. In this case, the adoption of performance measures using the EnerGov permitting, licensing, and code enforcement system is proposed.
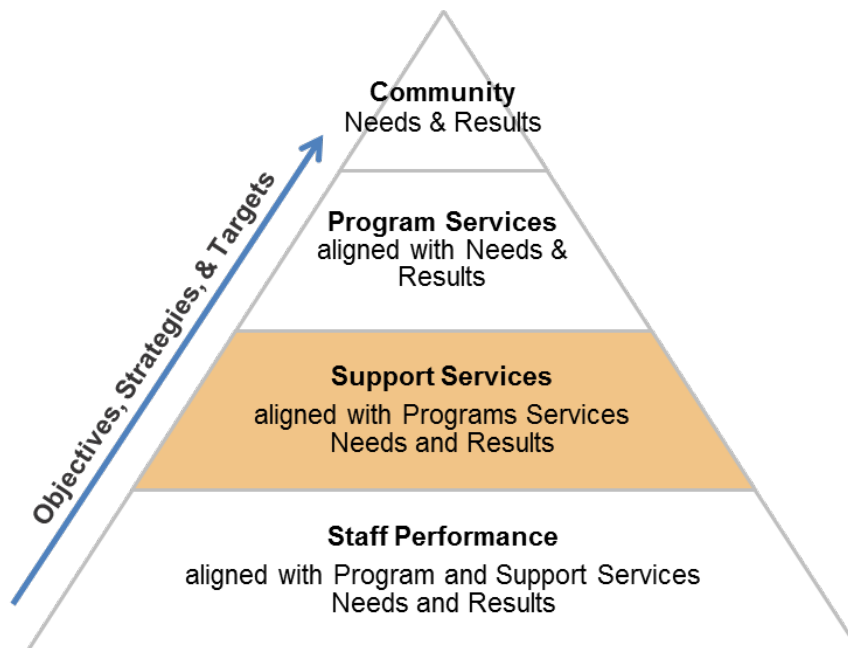
Figure E-1- Hierarchy for determining indicators to measure

Priorities and objectives are set through a planning process along with high-level performance measures and targets. Strategies for achieving the objectives are then set through a strategic planning or budget processes. Program, service, or organizational unit objectives and measures are also developed that align

with overarching objectives and strategies. Business unit performance objectives, strategies, and measures may also be part of a cascading system.

Tables E-1 and E-2 represent examples of measures from peer organizations reported on a regular basis (typically monthly) by communities throughout the United States. Permitting for both vertical (building) and horizontal (utilities) are captured by communities with approving new utility (water, sewer, and storm water) connections.

Table E-1: Examples of Peer Community Performance Measures		
Community Name	**Source of Measures**	**Source Location**
County of Lee, FL	Community Development Department Performance Dashboard	County Performance Dashboards
City of Port St. Lucie, FL	City Building Department Web Site	City Building Department Strategic FY21-26 Operations Plan
City of Centennial, CO	Building, Code Enforcement, and Planning Performance Measures	City Performance Management Dashboard
City of Glendale, CA	City Key Performance Measures by Fiscal Year	City Key Performance Indicators Website
City of Tampa, FL	Development and Growth Management Construction Services Dashboard	City Performance Measurement Dashboard Website
City of Sunnyvale, CA	City Annual Budget – Community Development Department (PDF Page 393)	City Adopted FY20-21 Budget and Resource Allocation Plan
City of West Palm Beach, FL	City of West Palm Beach's Quality Control Manual, Published by Building Division of Development Services	Internal Operations Document
City of Virginia Beach, VA	Policy Report: Evaluation of City Inspections Programs - Departments of Housing, Planning and Fire	City Department of Management Services Document
City of Austin, TX	City Success Metrics for the City's Development Services Department	City Success Metrics Dashboard
City of Dallas, TX	Development Services Department Performance Goals FY21-22	Development Services Performance Goals and Metrics

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	**Community**	**Type of Measure**	**Example of Measure**
Application Intake	Tampa	Online vs. In-Office Development Permit Applications	Monthly Total
Application Intake	Tampa	Payments Made Online vs. In Office (Yearly Total)	Yearly Total
Application Intake	Sunnyvale	Number of customers served at One-Stop Permit Center	FY Total compared to Target
Application Intake	Sunnyvale	Total land use permit application fees	FY Total ($760k)
Application Intake	Glendale	Number of trade plans submitted	FY Total
Application Intake	Glendale	Average number of days from application submission to hearing by permit type	FY Total
Building	Centennial	Average Rapid Review Permit Processing Time	Average Minutes - Expected/Historical Average vs. Actual
Building	Centennial	Average Rapid Review Customer Wait Time	Average Minutes - Expected/Historical Average vs. Actual
Building	City of Virginia Beach	Building Code Staff Distribution	% Allocation by Inspectors, Supervisors, Middle Management, Support Staff
Code Enforcement	Tampa	Complaint Response Time	Complaint Total / Average Response Days Compared to Goal, by Month
Code Enforcement	Tampa	Average Number of Days Cases Are Open	Monthly Average of Days, compared to goal (30 days) /

Process Type Category	Community	Type of Measure	Example of Measure
			Monthly total Cases closed
Code Enforcement	Tampa	Average Number of Days Cases Are Open	Avg. Days vs. Number of Cases Closed
Code Enforcement	City of Virginia Beach	Average Response Time to Complaints	Days (2)
Code Enforcement	City of Virginia Beach	Inspector Hours in Field	Average Daily Hours (About 5)
Building	City of Virginia Beach	Inspections per Work Day per Inspector	Average (based on 228 workdays) 17-23
Code Enforcement	West Palm Beach	% of complaints will be investigated within 24 hours after assignment	Goal 90%
Code Enforcement	West Palm Beach	% of initial investigation results entered into the Code Enforcement module within 24 hours after the investigation	Goal 100%
Code Enforcement	SafeBuilt	Gain voluntary compliance within 14 days of initial complaint	Goal 80%
Code Enforcement	SafeBuilt	Percent of complaining parties contacted within 1 business day of initial report	Annual %, Goal 95%
Code Enforcement	SafeBuilt	Number of proactive inspections	Monthly total, compared to goal (40)
Customer Service	Sunnyvale	Average time to answer customer phone calls	Average (seconds) compared to target (45 secs)
Customer Service	Sunnyvale	Number of customer survey respondents and percent rating the services provided at One-Stop Permit Center as good or better	Actual compared to goal (45/90%)

Table E-2: Peer Regulatory Agency Performance Measures

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	**Community**	**Type of Measure**	**Example of Measure**
Customer Service	Glendale	Total Number of customers served	FY Total
Customer Service	SafeBuilt	Return 95% of phone calls/emails within 1 business day of receipt and 100% within 2 business days	Monthly %, compared to goal
Green	Marin County	Number of new certified green businesses	FY Total
Inspections	Centennial	Total Number of Inspections	Total Number Expected/Historical vs. Actual
Inspections	City of Virginia Beach	Number of inspections per inspector	Yearly Average (785 - 2800)
Inspections	City of Virginia Beach	Inspections involving re-inspections	% (Yearly Total) Ranged 16*- 62%
Inspections	City of Virginia Beach	Mileage per inspector	Annual average (11k - 15k miles)
Inspections	City of Virginia Beach	Inspections by type	Annual total, compared to other municipalities (utility, right-of-way, fire)
Inspections	Sunnyvale	Number of inspections scheduled and % completed as scheduled	Annual total and % completed
Inspections	Sunnyvale	Inspections requested for next business day and completed	Annual total and % completed
Inspections	West Palm Beach	Field inspections scheduled before 7 AM shall be completed by the end of the business day	Goal 98% on-time

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	**Community**	**Type of Measure**	**Example of Measure**
Inspections	West Palm Beach	Accurate inspections without minor errors	Goal: conducted on at least 95% of commercial and residential projects
Inspections	West Palm Beach	Accurate inspections without major errors	Goal: conducted on at least 98% of commercial and residential projects
Inspections	SafeBuilt	Number of projects passing final inspection for which CO or CC issued	Goal 95%
Operations	Glendale	Cost per hour of operation	FY Total (2k)
Permit Issuance	Tampa	Number of New Residential Construction Permits Issued (Monthly)	Monthly Total
Permit Issuance	Tampa	Issued Residential New Construction by Zip Code (Monthly Total)	Monthly Total
Permit Issuance	Tampa	Building Permit Value	Total value by month
Permit Issuance	Tampa	Issued Commercial by Zip Code	Monthly Total
Permit Issuance	Tampa	Issued Commercial - All Construction Permits by Year	Yearly Total
Permit Issuance	Tampa	Issued Commercial - Multi-Family Permits	Monthly / Yearly Total
Permit Issuance	Tampa	Issued Commercial Multi-family by Zip Code	Monthly Total
Permit Issuance	Tampa	Issued Right of Way Permits (By Month)	Monthly Total
Permit Issuance	Centennial	Total Number of Permits Issued	Total Number Expected/Historical vs. Actual
Permit Issuance	Sunnyvale	Number of construction permits issued (regular, express, and minor)	Actual compared to total

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	Community	Type of Measure	Example of Measure
Permit Issuance	Glendale	Number of Building permits issued over the counter	FY total
Permit Issuance	Glendale	Average valuation of permit	FY Total
Plan Review	Tampa	New Construction Permit Average First Cycle Review Time	Average Number of Days compared to Goal
Plan Review	Tampa	Number of New Construction First Cycle Plans Reviewed (By Month)	Monthly Total
Plan Review	Tampa	Residential: Number of Alteration First Cycle Plans Reviewed (Monthly Total)	Monthly Total
Plan Review	Tampa	Residential Total Number of First Cycle Plan Reviews Completed	Alterations vs. New Construction, Monthly Total
Plan Review	Tampa	Residential: Alteration Permit Average First Cycle Review Time by Fiscal Year	Number of days, Compared to Goal
Plan Review	Tampa	Commercial: Alterations Permit Average First Cycle Review Time	Monthly Average Compared to Goal
Plan Review	Tampa	Commercial: Alterations Permit Average First Cycle Review Time by Fiscal Year (Compared to Goal)	Yearly Average Compared to Goal
Plan Review	Sunnyvale	Phone and counter planning/zoning inquiries	Annual Total
Plan Review	Sunnyvale	Number of staff decision Design Review applications submitted and percent receiving 1st set of staff comments in 14 or fewer calendar days.	Annual Total & %
Plan Review	Sunnyvale	Number of staff decision Design Review applications resubmitted and percent receiving staff comments in 14 or fewer calendar days.	Annual Total & %

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	**Community**	**Type of Measure**	**Example of Measure**
Plan Review	Sunnyvale	Number of public hearing planning applications reviewed; and percent sent a letter within 21 calendar days stating completeness status.	Annual Total & %
Plan Review	Sunnyvale	Number of land use permit applications without public hearing and percent processed within 14 days.	Annual Total & %
Plan Review	Sunnyvale	Number of administrative zoning permit reviews (including tree removal permits, sign permits, and other non-public hearing planning permits).	Annual total
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - New	Working Days in Cycle (Cycle 1 - 20 days, Cycle 2 - 15 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - Additions	Working Days in Cycle (Cycle 1 - 15 days, Cycle 2 - 10 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - Interior Alterations	Working Days in Cycle (Cycle 1 - 12 days, Cycle 2 - 8 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - Pool/Spa	Working Days in Cycle (Cycle 1 - 10 days, Cycle 2 - 7 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - Accessory Structures Repairs - Maintenance Garage Conversions	Working Days in Cycle (Cycle 1 - 10 days, Cycle 2 - 5 days, Cycle 3 - 5 days)

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	**Community**	**Type of Measure**	**Example of Measure**
Plan Review	Sacramento	Cycle Times for Commercial Building Plan Review - New	Working Days in Cycle (Cycle 1 - 20 days, Cycle 2 - 15 days, Cycle 3 - 10 days)
Plan Review	Sacramento	Cycle Times for Commercial Building Plan Review - Additions	Working Days in Cycle (Cycle 1 - 20 days, Cycle 2 - 10 days, Cycle 3 - 10 days)
Plan Review	Sacramento	Cycle Times for Commercial Building Plan Review - Alterations	Working Days in Cycle (Cycle 1 - 15 days, Cycle 2 - 10 days, Cycle 3 - 10 days)
Plan Review	Sacramento	Cycle Times for Commercial Building Plan Review - Deferred Submittals	Working Days in Cycle (Cycle 1 - 7 days, Cycle 2 - 5 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Commercial Building Plan Review - Other Review (i.e., Canopy, Gazebo, Art Work, Playsets, Temporary Trailers)	Working Days in Cycle (Cycle 1 - 10 days, Cycle 2 - 5 days, Cycle 3 - 5 days)
Plan Review	Sunnyvale	Express permit applications reviewed on same day	Annual Total
Plan Review	Sunnyvale	Building plan checks received and completed within 21 days	Annual Total, % Completed
Plan Review	West Palm Beach	Full plan review of large commercial projects within 30 days of submittal	80% Goal
Plan Review	West Palm Beach	Full plan review of new or larger residential projects within 14 days of submittal	80% on-time goal

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	**Community**	**Type of Measure**	**Example of Measure**
Plan Review	West Palm Beach	Number of online and minor permit application submissions and percent reviewed same day	Annual Total, % Completed
Plan Review	West Palm Beach	Full plan review of commercial interior remodel projects of less than 5,000 square feet within 14 days of submittal	80% on-time goal
Plan Review	West Palm Beach	Full plan review of single trade projects, less than $5,000 in value within 2 days of submittal	Annual Total
Plan Review	West Palm Beach	Accurate plan reviews without major errors	Goal at least 98% of major commercial and residential projects
Plan Review	West Palm Beach	Accurate plan reviews without minor errors on at least 95% of minor commercial and residential projects	Goal at least 95% of minor commercial and residential projects
Plan Review	West Palm Beach	Accurate plan reviews without life-safety errors	Goal at least 100% of commercial and residential projects
Plan Review	Sunnyvale	Number of surveys sent to applicants of completed planning permit applications, number of respondent sand percent rating the services provided by Planning as good or better	FY Total compared to Goal (650/85%)
Plan Review	Sunnyvale	Number of housing program applications (including BMR, first time homebuyer and rehabilitation) and percent processed within 21 days	FY total compared to target
Plan Review	Sunnyvale	Number of developer agreements and percent reviewed within 21 days.	FY total compared to target

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Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	**Community**	**Type of Measure**	**Example of Measure**
Plan Review	SafeBuilt	Number of pre-application meetings requested by contractors and design professionals	Monthly total
Plan Review	SafeBuilt	Provide comments to applicant for 100% of new residential plan reviews within 5 business days of receipt	Monthly %, Goal 100%
Plan Review	SafeBuilt	Provide comments to applicant for 100% of new commercial plan reviews within 5 business days of receipt	Monthly %
Plan Review	SafeBuilt	% of building inspections conducted next business day (received by 4 PM)	Goal 100%

Appendix C: Project Charter

City of Cape Coral, FL
EnerGov Stabilization Project Charter - Adoption Date – June 20, 2022

PROJECT OVERVIEW

The City completed the implementation of Tyler's EnerGov Civic Services Software for enterprise permitting, planning, and code enforcement activities in February 2022. This implementation began in 2019 to replace the City's legacy TRAKiT permitting system. Due to unforeseen challenges following the City's go-live, the City initiated this assessment to stabilize the implementation of the EnerGov System to fulfill the City's enterprise permitting, business tax receipts, and land management activities.

This implementation was performed in the context of the following challenges:

- The City transferred 5,000 active permits from the legacy system to the new system.
- The City completed a historical conversion of 620,000 permits and 3.2 million inspection results from the legacy system.
- The City instituted a nine (9) day hold on processing permits to clear the backlog creating significant work and negatively impacted the City's ability to meet service level expectations.
- The City has experienced significant delays in processing single-family residential permits.
- The City's IT Team is meeting daily with Development Services to assess significant performance issues pertaining to EnerGov system disruptions and unplanned service outages impacting the City's ability to process permits.
- The City is currently hosting its own instance of EnerGov 2020 and is evaluating the upgrade to v. 2021 to mitigate adverse performance impacts.
- The City recently converted over to Tyler Munis Financials after acquiring EnerGov to overcome integration challenges with the legacy JD Edwards system.
- The City and Tyler Technologies experienced significant staff turnover during the 18+ month implementation period during the COVID pandemic.
- The City is experiencing challenges to achieving customer service levels and realizing expected efficiencies.
- A new position within the City for an EnerGov Application Administrator in Information Technology Services.

Given the expected constituent service capabilities of EnerGov, City Council has elevated the priority to stabilize the system in order to achieve the benefits anticipated by the City's citizens and customers.

PROJECT OBJECTIVES

Provide a post-implementation review of Tyler Technologies EnerGov permitting, land management, code enforcement, and business licensing application and its primary system integrations with Tyler Munis, Tyler Cashiering, Tyler 311, Tyler Hub, Esri GIS, EnerGov CSS, and Bluebeam electronic plan review.
- Significantly reduce / eliminate unpredicted system outages
- Effectively integrate EnerGov with the City's new Munis Financials system – June 2020 – looking

to go live with Payroll/HCM function in August 2022.

- Address customer service level deficiencies and establish ways to achieve outcomes for measurable improvement including efficiency and productivity gains
- Identify specific recommendations for the City to achieve post-go live stabilization based upon proven practices to optimize the EnerGov system
- Ensure the City's capabilities to sustain and support its EnerGov system are properly evaluated to ensure staff training and resources are properly identified

KEY INTERNAL AND EXTERNAL INFLUENCING FACTORS

1. Backlog processing with limited resources to address stabilization activities.

2. Unprecedented workloads after the COVID-19 Pandemic.

3. Implementation fatigue

4. City/Tyler resource availability

5. City/Tyler product compatibility to support its enterprise systems

CRITICAL SUCCESS FACTORS

1. Commitment and visible support of an organizational champion.

2. Active involvement in the project by department heads and senior management.

3. The City commits adequate resources and time to the selection and implementation of the system.

In-Scope EnerGov Business Function Review Areas		
EnerGov Module	Function	Process
Licensing	Business Tax Receipts	New Business Registration
Licensing	Business Tax Receipts	Business Registration Renewal
Licensing	Business Tax Receipts	BTR/Zoning Compliance (Commercial)
Licensing	Business Tax Receipts	BTR/Zoning Compliance (Home Based Business)
Licensing	Licensing	Professional Licensing
Global (County Managed)	Address Management	New Address/Address Change
Plan	Planning	Quasi-judicial Plans (Hearing Examiner)
Plan	Planning	Legislative Plans (Planning Commission)
Permitting	Planning Permits	Temporary Use Permit and Sign Permit Processes
Permitting	Building Construction Permitting	Contractor Licensing / Verification
Permitting	Building Construction Permitting	Application Intake
Permitting	Building Construction Permitting	Plan Review (by Discipline)
Permitting	Building Construction Permitting	Inspections (by Discipline)
Permitting	Building Construction Permitting	Final Approval (Certificates of Completion, Use, Occupancy)
Permitting	Parks and Recreation	Special Event Permits
Permitting	Public Works	Driveway-Resod Permit and Right-of-Way Permit Processes
Code	Code Compliance	Case Initiation, Violations, and Compliance Achieved
Code	Code Compliance	Special Magistrate Hearing Process
Code	Code Compliance	RV and Boat Permit Process

In-Scope EnerGov Business Function Review Areas		
Code	Code Compliance	Abatement Performed, Liens/Assessments for Costs/Fine Recovery

WORK PLAN

Phase 1 - Community Development (CD) Solution Stabilization: Plante Moran will provide a post-implementation review of Tyler Technologies EnerGov permitting, land management, code enforcement, and business licensing application and its primary system integrations with Tyler Munis, Tyler Cashiering, Tyler 311, Tyler Hub, Esri GIS, EnerGov CSS, and Bluebeam electronic plan review.

Project Management and Initiation Activities

1. Conduct project management related initiation activities including stakeholder identification, identify/review supporting documents, and review project roles/responsibilities. Review Client's annual EnerGov support contract with Tyler Technologies to determine all SaaS software entitlements, managed services, and support services available to the City.

   Deliverable: Supporting Document Inventory

2. Develop a SharePoint site (Plante Moran can provide) for collaborating, storing, and managing project documents.

   Deliverable: Project SharePoint Collaboration Site

3. Establish project status meeting schedule with the Client Project Manager/Sponsor via web conference call to provide updates regarding project activities.

   Deliverable: Weekly Project Status Meetings, Monthly Executive Briefings

4. In conjunction with the Client's designated Project Manager/Sponsor, identify the core project team of key stakeholders and subject matter experts in a stakeholder registry. PM assumes the Client's team will identify key Client stakeholders and secure their commitments to assist with project activities.

   Deliverable: Project Stakeholder Register

5. Develop a timeline for the project activities, to align with the Client's needs and other resource commitments, and document this in a Microsoft Project Plan.

   Deliverable: Project Schedule

6. Prepare/Affirm Project Charter for the Client's Project Manager to review and use to communicate project objectives and aligning the Client's business expectations.

Deliverable: Project Charter, Project Log

7. Design and facilitate a kick-off presentation with orientation for project stakeholders to inform and schedule remote interviews. This will allow us to focus PM's interviews to better understand current processes and systems being used and maximize the value of stakeholder time.

Deliverable: Stakeholder Kick-Off Presentation, Scheduled Interviews

EnerGov System Stabilization

1. Conduct Interviews: Conduct onsite and remote interviews with the Client's project team to determine post-implementation gaps, remaining implementation services, solution strengths, weaknesses, opportunities, and unfulfilled business needs.

Deliverable: PM will provide up to 24 hours of interviews with 2 consultants between key Client stakeholders and subject matter experts (SME's). PM will also provide weekly executive briefings following each week of interviews to provide immediate feedback to leadership, implementation teams, and SME's to focus on the implementation.

2. System Implementation Assessment: During the interviews, PM will identify the configured systems, processes, and decisions associated with Exhibit B: In-Scope EnerGov Business Function Review Areas.

   - Confirm the integration status and approach for supporting side or "shadow" systems and the development and testing of required system interfaces.
   - Review and identify incomplete Tyler professional services for configuration, data migration, forms development, testing, and training services to be provided. and determine if they are in-scope for Tyler's implementation contract with the City.
   - Review and identify incomplete legacy data for migration
   - Review EnerGov CSS configured workflows
   - Review Bluebeam configured electronic plan reviews
   - Review managed support services provided by Tyler for the management responsibilities

Deliverable: Issues and Opportunities Matrix including the status of the elements of people, process, and technology associated with the deployment of the EnerGov result.

3. Plan of Action: Recommendations will be provided to the City to include but not be limited to the following:

   - Upgrade path for EnerGov, MUNIS, HUB, and other Tyler integrated solutions
   - Identification of strategies to manage a stable EnerGov environment
   - Schedule and sequencing of specific recommendations presented from the assessment

Deliverable: Plan of Action with Stabilization Recommendations

MILESTONES AND SCHEDULE TARGETS

Needs Assessment Phase   - 45-Business Day Delivery Target

      Project Initiation   June 6 -June 21, 2022

Stakeholder Interviews	June 22 – 30, 2022	
System Implementation Assessment	July 1 – July 22, 2022	
Peer Community Site Visit	July 25 – 29, 2022	
Plan of Action	July 29 – August 10, 2021	

PROJECT ORGANIZATIONAL STRUCTURE

The following table identifies the project roles, typical staff type, responsibilities, and estimated level of effort for activities conducted during the Selection & Procurement Phase of the project.

Role	Responsibility	Project Team Members
Executive Sponsors	- Maintain the project vision - Act as the project champion - Define project goals and objectives - Set direction for: - Future state vision and behaviors - Approach for delivering the project - Project funding - Project acceptance and go live - Benefit realization - Project focus - Energize the project leadership and teams - Be visibly committed to the project - Provide a strategic perspective when defining the needs for a future Development Services solution and associated processes - Remove project roadblocks - Secure alignment across departments - Coach the project leadership 'Face' of the project to oversight boards/committees - Address issues presented by the Project Manager - Clear roadblocks that jeopardize project success - Create the conditions to make the Project Managers successful in their role - Review and decide on proposed changes to organizational policies and procedures that will be impacted by the project - Review and make decisions on project change orders - Review and approve significant project recommendations (e.g., recommended vendor solution) - Provide input in regard to the project schedule and planning - Gain understanding of process and ability to communicate goals and milestones to subordinates	City Manager's Office Matt Grambow

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Role	Responsibility	Project Team Members
City Project Manager **Core Project Team (PMO)**	**Role: Assume** responsibility for communicating, executing, and delivering project results and outcomes. • Promptly and clearly communicate changes to organizational policies, procedures, and practices for those impacted by the project. • Recognize and support project milestones & activities and associated expectations for staff to effectively contribute to the project. • Ensure activities can be achieved according to the adopted project schedule. • Assess and recommend project change requests to schedule, resources, and/or project results or outcomes. • Manage and ensure the allocation of project resources achieves organizational goals. • Communicate project status, issues and risks to the Sponsors, Steering Committee, and stakeholders. • In conjunction with the Consultant Advisory Team, escalate issues in a timely manner to the Steering Committee or Executive Sponsor, as necessary. • Participate in the conduct of all project planning activities. • Ensure that project tasks, deliverables, and outcomes are reviewed by appropriate Authority staff. • Provide progress updates to the Steering Committee, Business Core Advisory Team, and all involved stakeholders. • Work with the Business and Technical Advisory Teams in communicating decisions to the Project Steering Committee for acceptance.	Matt Grambow (Executive) – Multiple Departments Continuity/Advisory **Core Team** Vince Cautero Stephen Poposki Bogdan Cyrnek Cari Kaletta Stacey Digiacomo Michelle Hoffmann Amy Yearsley

Role	Responsibility	Project Team Members
Business Advisory Team Leads	**Role:** Leads all staff, process, and technology evaluation and decisions associated for the in-scope areas of the stabilization of the LMS solution. Presents recommendations for all functional (business-level) decisions to the Steering Committee and PMO / Project Manager. **Responsibilities:** • Information conduit for staff in their service area regarding project team leads • Immediately forward questions and requests for project information from their service area to the PMO • Advocate and accurately represent the business objectives and needs • Provide support and guidance to the City's PMO for identifying subject matter experts to engage when concerns or unrecognized business needs are identified. • Identify and represent the business scenarios and functional requirements to be fulfilled by the replacement Land Management System. • Validate information presented within the City's RFP for its replacement Land Management System. • Communicate with staff in your service area to ensure your service area's changing needs are accurately represented • Identify and secure the subject matter expertise throughout for the involved business area throughout the project • Determine the appropriate level of involvement for all staff resources in their respective functional areas. • Ensure the necessary expertise is committed for decisions and evaluation within the functional areas each subject matter expert is assigned • Serve as the single voice for the organizational business areas each team member represents. • Reinforce business opportunities to be achieved and recognize ways to mitigate implementation challenges. • Provide information on current processes, systems, and shadow systems to be replaced. • Identify and evaluate potential procedural or policy changes that may require decisions related to implementation.	Vince Cautero, Development Services Director DSD Michelle Hoffmann, Information Technology Services Director Stephen Poposki, Building Official Michael Ilczyszyn, Public Works Director

Role	Responsibility	Project Team Members
Technical Advisory Team Leads **Technical Subject Matter Experts**	**Roles:** Leads all staff, process, and technology evaluation and decisions associated for the in-scope areas of the replacement ERP solution. Presents recommendations for all functional (business-level) decisions to the Steering Committee and PMO / Project Manager. **Responsibilities** • Complete the technical infrastructure questionnaires • Conduct due diligence on technical aspects of the vendors' solutions • Assess the impact of vendor solutions on the City technology infrastructure • Ensure vendor solutions conform with City IT policies, technical architecture, and standards • Establish the resource(s) for support during the implementation phase of the project • Ensure vendor solutions conform to IT policies, technical architecture, and standards. • Responsible for extracting data from legacy systems for data conversion activities. • Assist in resolving data conversion issues. • Assist in data cleansing activities. • Assist in interface design and testing activities. • Assist in the development of custom reports. • Participate in user acceptance testing activities.	**Technical Advisory Team Leads** Stephen Poposki, Building Official DSD Stacey Digiacomo, Business Applications Analyst II ITS **Technical SME's** Joe Gonzalez Troy Watson Matthew Vilord Elizabeth Merriken

Role	Responsibility	Project Team Members
Business Advisory Staff **Functional Subject Matter Experts**	**Role:** Project expertise and feedback to the Business Advisory Team and Technical Advisory Team throughout the project. **Responsibilities:** • Serve as experts across the organization as needed • Provide a departmental perspective on how processes are configured in the business system (e.g., workflows) • Provide a departmental perspective on how design decisions will impact their department. • Identify local departmental systems that may have critical data that needs to be converted. • Validate data conversion and provide acceptance testing support • Validate system interfaces and provide acceptance testing support • Bring specific examples from your department to the end user training – identify end-user training expectations • Identify go-live impacts to the department. • Serve on user acceptance and customer acceptance testing teams • Provide subject matter expertise on City business processes and requirements. • Participate in Project activities as required by the project team and project manager(s). • Provide subject matter expertise on City business processes and requirements. • Act as subject matter experts and attend current/future state and validation sessions as needed. • Attend all scheduled training sessions. • Participate in all required post-training processes as needed throughout Project. • Participate in Conversion Validation. • Test all Application configuration to ensure it satisfies business process requirements. • Become Application experts. • Participate in User Acceptance Testing. • Adopt and support changed procedures. • Complete all Deliverables by the due dates defined in the Project Plan. • Demonstrate competency with Tyler products processing prior to Production Cutover. • Provide knowledge transfer to City staff during and after implementation.	**Business Advisory Staff** Bogdan Cyrnek, Customer Service Supervisor DSD Cari Karletta, Customer Service Supervisor Bryan Vanderwalker, Construction Inspector **Functional SME's** Sherri Rhine Nita Whaley Todd Hoagland Elisabeth Helsel Taylor McClean Chad Boyko Brienne Cherry Ryan Kenney Scott Shangraw Ben Dunsworth David Hyyti Laura Reitenbach Abel Mendoza Krenda Nancarrow Dustin Jerwers Mike Burkhart Lora Guglielmini Persides Zambrano Michael Ilczyszyn Bryan Vandewalker

Role	Responsibility	Project Team Members
Upgrade Coordinator	• Become familiar with the Software Upgrade process and required steps. • Become familiar with Tyler's releases and updates. • Utilizes Tyler Community to stay abreast of the latest Tyler releases and updates, as well as the latest helpful tools to manage the City's Software Upgrade process. • Assists with the Software Upgrade process during implementation. • Manages Software Upgrade activities post-implementation. • Manages Software Upgrade plan activities. • Coordinates Software Upgrade plan activities with City and Tyler resources. • Communicates changes affecting users and department stakeholders. • Obtains department stakeholder signoffs to upgrade production environment.	Stacey Digiacomo, Business Applications Analyst II ITS
End-Users	**Role:** Actively participate as requested to provide feedback to the Subject Matter Experts (SMEs) and Business Advisory Team Leads / Technical Advisory Team Leads regarding the effectiveness of the replacement business system. **Responsibilities:** • Participate on project teams as requested by the Business / Technical Advisory Team Leads. • Provide input from an end-user perspective related to how business activities are currently performed.	End-Users
Plante Moran Consultant Advisory Team	**Role:** Provide expertise and guidance to ensure the fulfillment of business objectives and outcomes. **Responsibilities:** • Apprise the project manager of current and potential project risks and discuss means of mitigating these risks. • Work with the project manager in scheduling, planning, and conducting on-site visits. • Provide leadership and guidance to the other teams throughout the project. Facilitate project status meetings with the PMO and provide tools and templates to support the execution of project activities.	Christopher Blough, Project Manager David Kragenbrink, Project Consultant Glenn Park, Principal Project Consultant Bryan Tung, EnerGov Project Consultant

PROGRAM MANAGEMENT STANDARDS AND PROCEDURES

It is important to ensure that the entire project team is aware of the project standards and procedures, so that project deliverables are both uniform and easily referenced. SharePoint will be the primary source of project communications and archival of project information throughout the project.

ISSUES AND ACTION ITEMS MANAGEMENT

An issues and action items log will be placed on the project's SharePoint site. The issues database will include a description of the issue, a brief narrative of the potential impact to the project, date reported, date resolution needed, responsible party for follow up, and date resolved. The issues log review will be a part of the periodic Project Management meeting.

MEETING MANAGEMENT

The following ground rules should be followed with respect to project meetings:

- Honor other people's time. Be prompt in showing up at meetings (i.e., meetings will start at the scheduled time and end at the scheduled time).
- Attendance is strongly encouraged. If not available, have your back-up attend and debrief your designated back-up prior to the meeting.
- Bring your calendar to the meeting. Keep your calendar current.
- Pagers/phones off/vibrate. No surfing / emailing.
- Respect everyone's opinion.
- Do not interrupt others while they speak. One person speaking at a time, no sidebars.
- Speak-up, silence is consent. We will either actively contribute to decisions or implicitly agree to the outcome. Strive for consensus.
- Keep it functional, not personal.
- Major issues, action items and risks identified during the meeting should be communicated to the City Project Manager for logging purposes.

PRELIMINARY 45-DAY PROJECT SCHEDULE

Task Name	Start	Finish	Duration
City of Cape Coral FL - EnerGov Assessment Project	**Mon 6/6/22**	**Fri 8/5/22**	**45 days**
Project Management and Initiation Activities	**Mon 6/6/22**	**Tue 6/21/22**	**12 days**
Project kick-off meeting and supporting materials document discovery	Mon 6/6/22	Tue 6/21/22	12 days
Deliver project SharePoint collaboration site	Mon 6/6/22	Tue 6/21/22	12 days
Establish project status meeting schedule	Mon 6/6/22	Tue 6/21/22	12 days
Identify key project team stakeholders and subject matter experts	Mon 6/6/22	Tue 6/21/22	12 days
Develop and finalize project schedule and plan	Mon 6/6/22	Tue 6/21/22	12 days
Develop project charter	Mon 6/6/22	Tue 6/21/22	12 days
Stakeholder kick-off presentation and schedule discovery interviews	Mon 6/6/22	Tue 6/21/22	12 days
Phase 1: EnerGov System Stabilization	**Wed 6/22/22**	**Fri 8/5/22**	**33 days**
Conduct interviews	Wed 6/22/22	Fri 7/1/22	8 days
System implementation assessment	Mon 7/4/22	Fri 7/15/22	10 days
Peer Community Assessment	Mon 7/18/22	Fri 7/22/22	5 days
Plan of action recommendations released	Mon 7/25/22	Fri 8/5/22	10 days

CHARTER AUTHORIZATION

Signoff for the approval of the updated Project Charter.

CHARTER AUTHORIZATION

Signoff for the approval of the updated Project Charter.

_____

Rob Hernandez, City Manager, City Project Sponsor

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Matt Grambow, City Project Manager

Appendix D: Sample Permitting and Development Services Administrator Job Description

This sample job description was provided by the City of Des Moines IA based upon the City's service delivery model supporting the effective operations of the City's Development Services Department. This position, as proposed, would support a similar functional role within the City of Cape Coral Development Services Department.

Class Title	Permit and Development Administrator
FLSA Status	Exempt

General Statement of Duties

Plans, organizes and directs the operations and activities of the Permit and Development Division; performs directly related work as required.

Distinguishing Features of the Class

The principal function of an employee in this class is to provide administrative oversight to all operations and activities involving development, review, approval, permitting and inspection, and development and administration of development related codes and standards within the City of Des Moines. The work is performed under the direction of the Community Development Director but extensive leeway is granted for the exercise of independent judgement and initiative. Provides direction over the work of all employees within the Permit and Development Division and may be designated as building official or other official standing. The nature of the work performed requires that an employee in this class establish and maintain effective working relationships with other City employees, business and community groups, state and federal officials, representatives of the media and the public. The principal duties of this class are performed in a general office environment.

Examples of Essential Work (Illustrative Only)

- Plans, organizes, directs and evaluates the work of staff in implementing the expressed goals, policies and directives of the Permit and Development Division;
- Develops policies and procedures designed to increase the efficiency and effectiveness of Division operations and address development review, inspection and permitting needs within the City of Des Moines;
- Develops and administers the Divisional budget;
- Monitors inspection projects to ensure timely and accurate completion and adherence to all guidelines and ordinances;
- Oversees the development approval process, including investigating all complaints and resolving conflicts as necessary;
- Represents the Community Development Department on all issues relating to development reviews and approvals, inspections, permits and related, including serving as a liaison for the City Manager and City Council and serving on various Boards and Commissions;
- Provides status reports to the Community Development Director on permit and development operations, any major shift in policies or procedures and recommendations for future development;
- Participates in various aspects of personnel administration within the Division, including hiring, termination, grievance procedures and coordinating employee training;
- Performs special projects for the Community Development Director as requested;
- Provides needed information and demonstrations concerning how to perform certain work tasks to new employees in the same or similar class of positions;
- Keeps immediate supervisor and designated others fully and accurately informed concerning work progress, including present and potential work problems and suggestions for new or improved ways of addressing such problems;
- Attends meetings, conferences, workshops and training sessions and reviews publications and audio-visual materials to become and remain current on the principles, practices and new developments in assigned work areas;
- Responds to citizens' questions and comments in a courteous and timely manner;
- Communicates and coordinates regularly with appropriate others to maximize the effectiveness and efficiency of interdepartmental operations and activities;
- Performs other directly related duties consistent with the role and function of the classification.

Required Knowledge, Skills and Abilities

- Comprehensive knowledge of the current principles and practices associated with development review and approval, land use, permitting and inspections within a municipality;
- Comprehensive knowledge of all applicable ordinances and laws relating to construction and development;
- Comprehensive knowledge of standard codes, life safety codes, building codes, electrical codes, plumbing codes, HVAC codes, fire codes and development related codes and standards;
- Thorough knowledge of urban planning functions;
- Thorough knowledge of current principles and practices of public administration;
- Thorough knowledge of budgetary principles within a municipality;
-
- Ability to provide administrative direction within a municipal Department;
- Ability to supervise, train, evaluate and lead the work of others;
- Ability to communicate effectively with others, both orally and in writing, using both technical and non-technical language;
- Ability to understand and follow oral and/or written policies, procedures and instructions;
- Ability to prepare and present accurate and reliable reports containing findings and recommendations;
- Ability to operate a personal computer using standard or customized software applications appropriate to assigned tasks;
- Ability to use logical and creative thought processes to develop solutions according to written specifications and/or oral instructions;
- Ability to perform a wide variety of duties and responsibilities with accuracy and speed under the pressure of time-sensitive deadlines;
- Ability and willingness to quickly learn and put to use new skills and knowledge brought about by rapidly changing information and/or technology;
- Integrity, ingenuity and inventiveness in the performance of assigned tasks.

Acceptable Experience and Training

- Graduation from an accredited college or university with a Bachelor's Degree in Architecture, Engineering, Public Administration, Urban Planning or a related field; and
- Considerable experience in development operations within a municipality, including some management role; or
- Any equivalent combination of experience and training which provides the knowledge, skills and abilities necessary to perform the work.

Required Special Qualifications

- Candidates for positions in this class must pass a post-employment offer physical examination and drug screen;
- Possession of a valid Iowa driver's license or evidence of equivalent mobility.

Essential Physical Abilities

- Sufficient clarity of speech and hearing or other communication capabilities, with or without reasonable accommodation, which permits the employee to communicate effectively;
- Sufficient vision or other powers of observation, with or without reasonable accommodation, which permits the employee to review a wide variety of written material in electronic or hard copy form;
- Sufficient manual dexterity with or without reasonable accommodation, which permits the employee to operate a personal computer and related equipment;
- Sufficient personal mobility and physical reflexes, with or without reasonable accommodation, which permits the employee to have access to various work sites throughout the City and out of the area.