

**A RESOLUTION APPROVING A  
PROFESSIONAL SERVICES AGREEMENT  
CONSULTING SERVICES ADDENDUM TO  
PLANTE & MORAN, PLLC ENGAGEMENT LETTER**

BE IT RESOLVED BY THE PRESIDENT AND BOARD OF TRUSTEES OF THE VILLAGE OF ARLINGTON HEIGHTS:

SECTION ONE: A certain Professional Services Agreement - Consulting Services Addendum to Plante & Moran, PLLC Engagement Letter, by and between the Village of Arlington Heights and Plante & Moran, PLLC, related to Enterprise Resource Planning (ERP) Professional Consultant Services, a true and correct copy of which is attached hereto, be and the same is hereby approved.

SECTION TWO: The Village Manager is hereby authorized and directed to execute said agreement on behalf of the Village of Arlington Heights.

SECTION THREE: This Resolution shall be in full force and effect from and after its passage and approval in the manner provided by law.

AYES:

NAYS:

PASSED AND APPROVED this 20th day of September, 2021.

\_\_\_\_\_  
Village President

ATTEST:

\_\_\_\_\_  
Village Clerk

AGREEMENTRES:ERP Consulting Services – Plante & Moran

August 31, 2021

Randall Recklaus, Village Manager  
Village of Arlington Heights IL  
33 S. Arlington Heights Rd.  
Arlington Heights, IL 60005

Dear Mr. Recklaus:

Thank you for your selection of Plante & Moran, PLLC to assist the Village. 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 Village of Arlington Heights IL ("Client").

## Scope of Services

The Village recognizes that the implementation of a new system will be challenging as it transitions its legacy systems and processes to a new way of doing business. The Village also understands that the magnitude of such a change will require strong project management skills to ensure that Village and vendor activities are completed on-time, that best-practices are leveraged that Tyler performs its services according to the contracted terms and that the expected business process efficiencies are realized.

As such, the Village has requested Plante Moran perform Phase 3: Implementation Advisory Services as outlined its proposal submitted on July 24, 2019 and incorporated by reference as Exhibit B into its contract with the Village of Arlington Heights executed on October 17, 2019. Plante Moran proposes to perform these services over a 26-month term based upon the expected duration of the Village's ERP project implementation period.

## Fees and Payment Terms

The Plante Moran Government Consulting Team has significant experience supporting local government and other clients through numerous software implementation projects. Additionally, Plante Moran staff have specific implementation experience with the Village's preferred finalist vendor. Furthermore, our clients have confirmed that we add tremendous value during software implementation projects including:

- **Value of Experience.** Ability to avoid pitfalls which we have learned through similar projects allowing them to be addressed proactively rather than reactively.
- **Value of Foresight.** Ability to see "warning signs" in advance and address them before they become major project challenges.
- **Value of Qualifications.** Qualified project managers who have significant credentials to manage software implementations.
- **Value of Objectivity.** Independent advisor with respect to project improvements that will arise regarding technology, processes, and people.
- **Value of Risk Mitigation.** Overall risk mitigation to the project.

Our fee for this engagement, subject to the terms and conditions of the accompanying Professional Services Agreement will be based on the actual time that PM staff expend at a blended hourly rate of \$225/hr, not to exceed \$234,000 subject to the terms and conditions of the accompanying Professional Services Agreement. Our services will be billed monthly for services rendered in the previous month.

We estimate that our fee for this engagement will be approximately \$9,000 per month based upon an average of 40 hours per month to support the project activities represented in Attachment #1: Implementation Advisory Services Matrix to this agreement, plus any related costs we incur.

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. 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.

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**

A handwritten signature in black ink, appearing to read "Michael J. Riffel". The signature is fluid and cursive, with a prominent initial "M" and "J".

Mike Riffel, Partner

## Agreed and Accepted

We accept this engagement letter and the accompanying Professional Services Agreement (collectively, "Agreement"), which set forth the entire agreement between Village of Arlington Heights IL 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 Village of Arlington Heights IL.

### Village of Arlington Heights IL

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Randall Recklaus  
Village Manager

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Date

### Plante Moran, PLLC



8/31/2021

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Mike Riffel  
Partner

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Date

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

This Professional Services Agreement is part of the engagement letter for our consulting services dated August 23, 2021 between Plante & Moran, PLLC (referred to herein as “PM”) and Village of Arlington Heights IL (referred to herein as “Client”).

1. **Management Responsibilities** – The consulting 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 Diana Mikula, Assistant Village Manager, to oversee the services PM will provide.

Client represents and warrants that any and all information that it transmits 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 project activities will be based on information and records provided to PM by Client. PM will rely on such underlying information and records and the project activities will not include audit or verification of the information and records provided to PM in connection with the project activities.

The project activities 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. **Project Deliverables** – At the conclusion of PM’s project activities and periodically as PM progresses, PM will review the results of its work with Client and provide Client with any observations related to PM’s services that PM believes warrant Client’s attention. PM also will provide Client with copies of analyses or other materials that PM may develop in the course of this engagement upon Client’s request. PM will not issue a written report as a result of this engagement and Client agrees that the nature and extent of the work product that PM will provide, as outlined in this Agreement, are sufficient for Client’s purposes.
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 project deliverables and are to be used only as expressly described in and authorized by the project deliverables. PM disclaims any responsibility for any use of the Electronic Documents that is not expressly provided for in and authorized by the project deliverables. 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 Electronic Documents for any events or circumstances that occur or become known subsequent to the date of their corresponding project deliverables.

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 project deliverables.

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 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 unless otherwise required by law. 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 project activities 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. 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, 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. This provision shall survive the termination of this engagement.
13. **Defense, Indemnification, and Hold Harmless** – As a condition of PM’s willingness to perform the services provided for in the accompanying engagement letter, without waiving any statutory tort immunity, Client agrees 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 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. PM agrees to defend, indemnify, and hold Client harmless against any claims by third parties for losses, claims, damages, or liabilities, to which Client may become subject to the extent caused by 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 Client. This defense, indemnity, and hold harmless obligation includes the obligation to reimburse Client for any legal or other expenses incurred by Client, as incurred, in connection with investigating or defending any such losses, claims, damages, or liabilities.
15. **Conditions of PM Visit to Client Facilities** – Client agrees that PM’s services will be provided remotely to the maximum extent possible. 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 facilities are determined by PM in its sole discretion to be necessary for the performance of the engaged services, Client agrees, as a pre-condition to any such in-person visit, to provide to PM for PM’s evaluation Client’s policies and procedures that Client has implemented and will adhere to relating to workplace safety and the prevention of the transmission of disease at its facilities. 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 facilities. Client further affirms that it is in compliance and shall continue to comply with all other applicable laws, regulations, or executive orders relating to COVID-19 and the prevention of the spread thereof (collectively, “COVID-19 Laws”) and agrees that it shall continue to comply with COVID-19 Laws throughout any in-person visits by PM to Client’s facilities. Notwithstanding the foregoing, PM reserves the right to suspend or refrain from any in-person visit by PM to Client’s facilities or impose further conditions on any such in-person visit if and as PM deems necessary at its sole discretion. Client agrees and acknowledges that any determination by PM to visit Client’s facilities 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 or any COVID-19 Laws.
16. **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.



17. **Termination of Engagement** – This Agreement may be terminated by either party upon written notice. Upon notification of termination, PM's services will cease and PM's engagement will be deemed to have been completed. Client will be obligated to compensate PM for all time expended and to reimburse PM for related costs PM incurs through the date of termination of this engagement.
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. **Agreement Not to Influence** – Client and PM each agree that each respective organization and its employees will not endeavor to influence the other's employees to seek any employment or other contractual arrangement with it, during this engagement or for a period of one year after termination of the engagement. Client agrees that PM employees are not "contract for hire." PM may release Client from these restrictions if Client agrees to reimburse PM for its recruiting, training, and administrative investment in the applicable employee. In such event, the reimbursement amount shall be equal to two hundred hours of billings at the hourly rate stated in this Agreement for the PM employee.
22. **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.
23. **Governing Law** – This Agreement shall be governed by and construed in accordance with the laws of the State of Illinois, 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 Illinois.

### **End of Professional Services Agreement – Consulting Services**

## Attachment 1: Implementation Advisory Services Matrix

	The RACI model brings structure and clarity to describing the roles that stakeholders play within a project. The following matrix clarifies responsibilities and ensures that everything the project needs done is assigned someone to do it. The key roles that stakeholders manage include the following:				
<b>R</b>	Responsible - People or stakeholders who do the work. They must complete the task or objective or oversee that it is completed.				
<b>A</b>	Accountable - Person or stakeholder who is the "owner" of the resulting work. He or she must sign off or approve when the task, objective or decision is complete.				
<b>C</b>	Contributor/Consulted - People or stakeholders who provide information to completing the task. These people are "in the loop" and active participants.				
<b>Implementation Activities Including Tyler Statement of Work Items (Second Round Review)</b>		<b>Client</b>	<b>Tyler</b>	<b>Plante Moran</b>	<b>tool/method/approach</b>
<b>Plante Moran Foundational Project Management</b>					
1	Conduct risk assessment	<b>A/R</b>	<b>R/C</b>	<b>R</b>	Our project risk assessment approach includes holding a meeting with the Steering Team to discuss common implementation risks. We will then expand on this list by discussing and documenting Client specific risks in the Project Risk Log tool.
2	Conduct change readiness assessment	<b>A/R</b>	<b>C</b>	<b>C</b>	We will conduct a change readiness assessment to evaluate the organizations familiarity with the project, preferred learning types, resistance to change.
3	Establish project PMO and governance (sponsorship)	<b>A/R</b>	<b>C</b>	<b>C</b>	Collaborate with the clients PM and executive sponsor to determine which staff will be assigned to the Executive Steering Committee (ESC) (we recommend department heads of the functional areas in question and IT). We will then work with the ESC to develop the change process and identify other project teammates.

4	Document change control plan	A/R	C	R	We will work with the Village to establish the process for managing decisions and changes that are the result of project work. This includes using a formal decision request template and change request template to present proposed items to the steering committee. On a monthly basis we will work with the vendors to document items that are presented as changes, work with module leads to validate and then present to the ESC.
5	Develop staffing plan for stakeholders involved	A/R	C	C	Work with the ESC to identify module leads, communication leads, training leads etc. Collaborate with leads to determine extended team members. Get these staff up to speed with the scope and cadence of the project prior to the internal kick off.
6	Internal team kick off	A/R	C	R	We will prepare an internal kick-off and support the Village's PM in educating key project staff on their roles and responsibilities.
7	Develop Communication plan	A/R	C	C	Work with PM/assigned communications lead to define the Village communication plan and frequency. We can help with writing announcements and messaging. Information gathered during the change readiness assessment will contribute to how this plan is structured. We can help the Village maintain this plan through the length of the project.
8	Establish project status meeting plan & reporting tools	A/R	C	R	We will work with the Client to determine meeting cadence, implementation status meetings are generally led by the vendor and Plante. Project status and upcoming steps will be discussed and then the project issue log should be reviewed and updated.
9	Project Issue and Action item tracking	A/R	R	R	This log is maintained on SharePoint (either an excel log or integrated into the site). Issues or Action items should be added to this list by ALL groups (client, vendor, plante). At project team meetings (with module leads and PMs) this log should be reviewed.

10	Budget tracking	A/R	C	R	We can assist the Village in tracking the project budget, reviewing invoices and confirming they agree with contracted terms providing an extra layer of oversight before vendor payments are issued.
11	WRICEF- Tracker (workflows, reports, integrations, customizations, extracts, forms, user defined fields)	A/R	C	R	We can create a log to track all of these things.
12	Project Management Plan	A/C	C/R	R	Develop the project management plan which includes the following attributes:
13	Scope management plan	A/C	R	C	
14	Communications management plan	A/R	C	C	
15	Risk management plan	A/R	C	R	This project risk management plan will be maintained as a log where new and existing risks can be tracked and their mitigation strategy documented.
16	Establish Risk management tracker	A/R	C	R	This log is established during the time of the risk assessment. Following the assessment the log will be maintained throughout the project and updated as risks are identified. The log additionally includes a mitigation strategy.
17	Quality management plan	A/R	C	R	Document procedures and processes for managing decisions/changes that occur throughout the project.
18	Support end user training planning	A/R	C	C	Assist the Village in planning for and developing a schedule for EU training.
19	Change impact analysis template	A/R	R	C	
20	Data conversion plan template	A/R	R	C	Work with the vendor to obtain templates and help Village through prep process.

21	Project charter	A/R	C	R	Develop an implementation project charter that describes the project teams roles and plante moran roles. We will work collaboratively to finalize this document.
22	Adopt project schedule	R	A/R	C	Review and provide feedback on proposed vendor schedule

23	Review documented processes (blueprinting)	A/R	R	C	
24	Project kickoff	A	R	C	
25	Develop implementation plan	A/R	R	R	We will align our services with the activities in the vendors implementation plan...
<b>Tyler Statement of Work</b>					
<b>Initiate and Plan</b>					
26	Initial Coordination				
22	Tyler project team is assigned	C	A/R	C	
23	Client project team is assigned (See item#5)	A/R	C	C	
24	Provide initial project documents to Arlington Heights	C	A/R	C	
25	Gather preliminary information requested	A/R	C	R/C	We will help the Client in gathering documentation as requested by vendor.
26	Sales to implementation knowledge transfer	C	A/R	C	
27	Create Project Portal to store project artifacts and facilitate communication	C	A/R	C	
28	<b>Project/Phase Planning</b>				
29	Schedule and conduct planning session(s)	C	A/R	C	

30	Develop Project Management Plan	C	A/R	C	Align this plan with our PM plan approach and confirm all the appropriate pieces are included and procedures for managing change are documented.
31	Develop initial project schedule	C	A/R	C	
32	<b>Infrastructure Planning</b>				
33	Develop Implementation & Post-Implementation Application Management Support Plan	A/R/C	A/R/C	C	
34	Provide Infrastructure Requirements and Design Document	C	A/R	C	
35	Initial Infrastructure Meeting	C	A/R	C	
36	*Schedule SaaS Environment Availability	C	A/R	C	
37	*Schedule Hardware to be Available for Installation	C	A/R	C	
38	Schedule Installation of All Licensed Software	R/C	A/R	C	
39	Infrastructure Audit	C	A/R	C	
40	<b>Stakeholder Meeting</b>				
41	Create Stakeholder Meeting Presentation	C	A/R	C	

42	Review Stakeholder Meeting Presentation	A/R	C	C	
43	Perform Stakeholder Meeting Presentation	C	A/R	C	
44	<b>GIS Preparation</b>				
45	Initial GIS Planning Meeting	C	A/R	C	
46	Determine all GIS Data Sources	A/R	C	C	
47	Provide Source GIS Data	A/R	C	C	
48	Review GIS Data and Provide Feedback	C	A/R	C	
<b>Assess and Define</b>					
49	Solution Orientation				
50	Provide pre-requisites	C	A/R	C	
51	Complete pre-requisites	A/R	C	C	
52	Conduct orientation	C	A/R	C	
53	Current and Future State Analysis				
54	Current State process review	C	A/R	C	
55	Discuss future-state options	C	A/R	C	
56	Make future-state decisions (non-COTS)	A/R	C	C	

57	Document anticipated configuration options required to support future state	C	A/R	C	
58	Data conversion assessment				
59	Extract data from source systems	A/R	C	C	
60	Complete data analysis and mapping	A/R	C	C	
61	Review and scrub source data	A/R	C	C	
62	Build/update data conversion plan	A/R	C	C	
<b>Prepare Solution</b>					
63	Initial System Deployment				
64	Prepare hosted environment	C	A/R	C	
65	Install Licensed Software with Initial Database on Server(s) for Included Environments	C	A/R	C	
66	Install Licensed Software on Client Devices (if applicable)	A/R	C	C	
67	Tyler System Administration Training (if applicable)	C	A/R	C	
68	<b>Configuration Activities</b>				



69	Conduct configuration training	C	A/R	C	
70	Complete Tyler configuration tasks (where applicable)	C	A/R	C	
71	Complete Client configuration tasks (where applicable)	A/R	C	C	
72	Standard interfaces configuration and training (if applicable)	C	A/R	C	
73	Updates to Solution Validation testing plan	A/R	C	C	
74	Process Redefinement				
75	Conduct process training	C	A/R	C	
76	Confirm process decisions	A/R	C	C	We can help the Village in planning for testing but cannot take ownership of executing system tests. Ultimately the village must be responsible for the testing and acceptance of the system.
77	Test configuration	A/R	C	C	
78	Refine configuration (Client Responsible)	A/R	C	C	
79	Refine configuration (Tyler Responsible)	C	A/R	C	
80	Validate interface process and results	A/R	C	C	

81	Update client-specific process documentation (if applicable)	A/R	C	C	
82	Updates to Solution Validation testing plan	A/R	C	C	
83	Conversion Delivery				
84	Provide data crosswalks/code mapping tool	C	A/R	C	
85	Populate data crosswalks/code mapping tool	A/R	C	C	
86	Iterations: Conversion Development	C	A/R	C	
87	Iterations: Deliver converted data	C	A/R	C	
88	Iterations: Proof/Review data and reconcile to source system	A/R	C	C	
<b>Production Readiness</b>					
89	Solution Validation				
90	Update Solution Validation plan	C	A/R	C	
91	Update test scripts (as applicable)	A/R	C	C	We will support the Village as they work to tailor the test scripts to meet their business processes but generally we cannot take ownership of this task. The Village has to own system acceptance including the scenarios that acceptance will be measured against.
92	Perform testing	A/R	C	C	
93	Document issues from testing	C	A/R	C	

94	<b>Go-Live Readiness</b>				
95	Perform Readiness Assessment	C	A/R	C	
96	Conduct Go-Live planning session	C	A/R	C	
97	Order peripheral hardware (if applicable)	A/R	C	C	
98	Confirm procedures for Go-Live issue reporting & resolution	C	A/R	C	
99	Develop Go-Live checklist	C	A/R	C	
100	Final system infrastructure review (where applicable)	C	A/R	C	
101	End User Training				
102	Update training plan	C	A/R	C	
103	End User training (Tyler-led)	C	A/R	C	
104	Train-the-trainer	C	A/R	C	
105	End User training (Client-led)	A/R	C	C	
<b>Production Readiness</b>					
106	Go-Live				
107	Provide final source data extract, if applicable	A/R	C	C	

108	Final source data pushed into production environment, if applicable	C	A/R	C	
109	Proof final converted data, if applicable	A/R	C	C	
110	Complete Go-Live activities as defined in the Go-Live action plan	A/R	C	R	We will use the vendors cut-over plan and add activities to this list. On recent deployments we have used a KANBAN board to facilitate daily standup meetings regarding activities that must be complete prior to go-live.
111	Provide Go-Live assistance	C	A/R	C	
112	Transition to Client (Village) Services				
113	Transfer client to Client Services and review issue reporting and resolution processes	C	A/R	C	
114	Review long term maintenance and continuous improvement	C	A/R	C	
115	Post Go-Live Activities				
116	Schedule contracted activities that are planned for delivery after go-live	C	A/R	C	
117	Determine resolution plan in preparation for phase or project close out	C	A/R	C	

<b>Production</b>					
118	Phase Closeout				
119	Reconcile project budget and status of contract Deliverables	A/R/C	A/R/C	R	Through budget tracking we will have an accurate understanding of outstanding deliverables.
120	Hold post phase review meeting	A/R/C	A/R/C	C	
121	Release phase-dependent Tyler project resources	C	A/R	C	
122	Project Closeout				
123	Conduct post project review	C	A/R	C	
124	Deliver post project report to Arlington Heights and Tyler leadership	C	A/R	C	
125	Release Tyler project resources	C	A/R	C	
<b>Close</b>					
126	Final planning and migration of data	A/R	C	C	
127	Execute cutover plan	A/R	R/C	C	We will support the cut-over by assisting the Village in issue and action tracking.
128	Post-implementation & user adoption review	A/R	R/C	R/C	

129	Compile and prioritize identified optimization opportunities	<b>A/R</b>	R/C	<b>R</b>	We will document opportunities for system improvements during the implementation that can be focused on following go-live. Often tasks/activities will be identified through the implementation that the Village is interested in pursuing. To keep the group focused on the implementation tasks we will document these activities and further optimization opportunities in a log to be prioritized and addressed following go-live.
130	Post Go-Live Activities				
131	Schedule contracted activities that are planned for delivery after go-live	<b>A/R</b>	<b>C</b>	<b>C</b>	
132	Determine resolution plan in preparation for phase or project close out	<b>A/R</b>	<b>C</b>	<b>C</b>	