Attachment II – Municipality Interview Results

Questions	Organization			
	Lake County, IL Matthew Meyers, Deputy Director, Planning, Building, and Development 847) 377-2079, mmeyers@lakecountyil.gov	City of San Mateo, CA Phil Kawakami, Business Systems Analyst & EnerGov Project Coordinator (650) 522-7169, kawakami@cityofsanmateo.org	City of Temecula, CA Stuart Fisk, Principal Planner 951-694-6400 Stuart.fisk@temeculaca.gov Brandon Rabidou, Assistant Planner (951) 506-5142 brandon.rabidou@temeculaca.gov	City of Grand Junction, CO Senta Costello, Associate Planner & EnerGov Administrator 970-244-1430 sentac@gjcity.org
How long have you been using EnerGov?	About 2 years (since March 2017).	About 4 years (since June 2015). Have been on the SIlverLight system but HTML 5 revamp coming soon.	About 5 years (Oct 2014) (permits plus before that);	Over 8 years (Jan 2011). Tried to go live 2010 and decided not ready (they didn't do enough up-front testing; went live and found out the kinks and changes they needed (i.e. in custom fields, workflows, etc).
Happy with it? What functionality is most impressive? Least impressive? Do query and reporting tools meet user needs? Easy to use?	Yes; in on time and under budget. See our video and testimonial on the EnerGov website for more information: https://www.tylertech.com/products/energov/love-your-local-gov/lake-county-illinois-identifying-needs-and-implementing-solutions	• Diff users have diff opinions. Inspectors aren't happy about anything, BUT it's meeting our needs (all permits, plan reviews, fees, applications, code cases, public works). It could always be better. Launched online customer portal earlier this year. • Takes in lots of data, but also requires lots of maintenance (but we're on-premesis). • Having a dedicated person is very helpful for maintenance. Initially, Phil was doing both maint and long-range planning, but too hard. They now have an IT person 80% dedicated to EnerGov maintenance (e.g. trouble-shooting, change of permissions, user support, etc), so that Phil can focus on long-range planning (e.g. changes in structure of permit types and work classes, reports, major fee changes, etc.) **Most impressive features**: it handles all fees, integrates iPads in the field (there's an Apple app that inspectors love and syncs with back office), public web portal, ePlan reviews, letters. Does many things well. (It's comprehensive) **Least impressive**: Tyler is so big, so many customers, response time to enhancements and changes is slower than we'd like. Example: asking for upgrades. Has taken over 3 months to get upgrade to one environment as a copy of the production environment. Timeliness of responding to bugs an issue: Example: We found a bug and were told to look at the Tyler Community thread to	Very happy; use system for public works (land dev), planning, code, building, fire. One area of deficiency is code enforcement – iPad application was a step backward per some of the inspectors. But some of that is subjective, based on personality types and individual preferences.	Overall, yes. Issues with buy-in from non-tech-savvy staff. System has markedly improved efficiency; for example, cut down paper (1 project had 25 packets of info to mail; that has now all moved online). Shortened review times by cutting the mailing.

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		learn how to fix it (they made us to do research instead of providing direct guidance). • Not happy w/tools w/in EnerGov. San Mateo on-premises solution (SaaS clients don't have access to the tool database), so they can create SEQUAL reports to meet their needs; 2019 upgrade may be better. • Stock reports not great. Advanced search can query but can only do one permit type at a time (not multiple) but you can multi-select with new HTML 5 system. • New HTML 5 version is in apps (pieces at a time) so Hayward will get pieces of Silverlight and new HTML system (the 2019 version). The whole software changes over to HTML 5 in 2021. • A lot more competition now that tech companies getting into govt software. All are roughly the same. Tyler is the largest public software company in the US. Newer programs more agile, don't require as intense resources to maintain, but may be absorbed by Tyler, which is the fasted growing.		
Describe the implementation process (**especially** the data conversion and migration process) How did you manage data conversion (# of yrs of detail vs summary data)? What would you have done differently?	Biggest challenge was amount of staff effort (especially IT). 13 legacy systems. About 500 hours. Must populate Tyler template, tell them how to map each field to the new system, then check work. Initial scope of 3 passes took them 6 total passes in the end; however, they've had no issues since then. Tyler implementation staff are great.	2 year implementation. Have been using the software for over 6 years. Data conversion is the most important phase of the entire project; so tedious and people tire of testing it, but the more tests the better the data the better the end product. CLEAN/SCRUB THE DATA before bringing it in. For example: • Start early and do more testing than you think you need.. • When you bring in the data look at historical records in EnerGov and try to run reports. For example: • Automation - is usually built off of dates, so the date in the old system needs to be correctly documented in the new system.	Phase 1: define and assess; how baked are our processes? There are many opportunities for process improvements esp. if legacy systems drive processes. Emphasis: Start with most difficult permit first – start to finish, figure out all the steps and exceptions. They'll ask you to look at all workflow at once, e.g. all fees (very siloed process). BUT if you look at things holistically, diagram each process start to finish – worst case scenario (e.g. every amendment, appeal, etc) the you'll know the right q's to ask about how the software handles this. Spent months on implementation; whatever time, reevaluate. Dedicated experts from each department – council,	• Another staff person headed that piece (talk to Scott). They migrated data from 10 programs, including legacy software, databases, Excel, etc. • They designed custom fields; no issues overall. Able to find all their data easily. • One thing she would do differently would be to have more input in what custom fields are called and where they're put. They customized everything (but this also helped them learn the

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Did you backfill positions?		• Fees – if you bring over data not paid or invoiced, it means something diff in EnerGov. Anything with status of "invoice" pple can pay whether you want them to or not. Every time you change the script, you have to go back in EnerGov to see the true impact of the script change. Backfill of positions was included in the budget, but they didn't actually need to hire. Per diems used for a short time in . Code and Planning, but not ongoing. But the main supervisor overseeing permit techs was integral in the software implementation process, so they moved her out of the permit center cubicle and another employee took up the slack.	CM must say we are dedicating this time and resources or hire supplemental staff and it will be long implementation time. His team didn't get that staffing (Pasedena brought in expert staff and outside help to backfill those positions and process was smoother). Points of Contact for Implementation: • EnerGov- Kevin Ruggles for implementation • EnerGov- Daniel Evans (he is now part of the EnerGov Assist Team) He is currently on the EnerGov Assist team and he travels for go-lives. He's very technical and very knowledgeable.	system, so they don't rely on outside help). As things change, their internal staff administers the system (they don't use EnerGov Assist).
Did you use a consultant to implement?	Yes; project management (scheduling meetings, project timelines, etc.)	Yes. $100k SoftResources. Elaine is excellent for implementation. Didn't use all the money in the contract; once City was up and going with how to use the software they needed SoftResources support less and less.	Yes: SoftResources. You should have your own consultant; they can tell you what Tyler should be doing and what the system can do. A consultant is critical in this process.	Yes. Project manager onsite for about 2 weeks through EnerGov (this was before Tyler bought them). They were the 2nd agency to go live with the Enterprise software.
Cost? (Deferred maintenance fees?)	Not sure, but info is public.	• Contract $391k software; $393 implementation services (plus $34k travel 20 trips $1,700/trip) = 818 • $79k maint. Plus other soft costs. • They are on-premises for the software.	• They did full implementation; total cost with software was around 900k; year 1 of maintenance is 86k (they negotiated a locked in rate for 5 years). • They are on-premises for the software.	
How many people using the software?	Five departments across Lake County	Planning, code enforcement, permits, business licenses, building. They are just now moving to the e-plan check module. They collect fees via the cashier function in EnerGov.	Pop 113k; 4 planners; 1 planner hybrid; 1 building mngr, 5 safety inspectors; 4 permit techs 1 manager; 3 code staff; 1 admin for each entity; fire is contracted out; business licenses and fees;	Planning, code enforcement, courts for a segment of what they do, parks for weeds enforcement, business license module to track annual registrations, permitting; no fire modules
Seamless interface with MUNIS?	They don't use MUNIS; they use iasWorld for their property tax & CAMA system	They use Eden instead	They use Eden instead	Don't use it. But they use Tyler's New World and public safety module.

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Lessons learned? Challenges?	• Tyler will ask use to complete a "survey" for each "project" (for example, under permit type could be build a house, a shed, etc. Next, you define the fees, workflow, etc.). In all, there were 300 surveys and you can't see what the final results will look like until it's done. Therefore, identify and complete the most complex survey first, and then make changes that can be rolled out across all the subsequent surveys. • Set up a Core Team with staff at the appropriate decision-making level and/or who are technical experts; • System Administrator post implementation is a critical role (hire or use "EnerGov Assist", Tyler's software administration service that provides access to Tyler staff, training, and best practices to help with administration and configuration for a % of yrly maint. cost). Hold a bi-weekly meeting with this person and the Core Team to address system changes/issues	• Hard for planning staff to find time to administer changes to the system, but it's not technically challenging. • Permit intake includes a lot of steps in SilverLight (lots of clicking, duplicate and unnecessary information) – the coming upgrade to HTML 5 may address these issues. • Planning applications are great – organized, easy to modify, can create templates and standard conditions.	• EnerGov shares best practices/sharing • They use EnerGov Assist; IT finds it useful, but they have major projects they specifically wanted EnerGov assist for. If we do not have an administrator dedicated for EnerGov, we will find value in it as well. • System Changes: • Prior to implementation – cohort of experts; then go back to dept to discuss. • Post implementation, 90% of time planner can go into the system to make changes if he/she's tech savvy; 9% it goes to IT; 1% to EnerGov • Call a bunch of cities; • Can't stress enough; do a walk through of how different cities do their processes. Do screen shares, see how doing. • Follow their workflows. If use system as designed, it's easier to maintain – try to avoid customization.	• They have a biweekly meeting with someone with EnerGov; its less useful now, unless they want to add new modules to the system. • Biggest challenge is staffing: had an implementation team of 9-12 people; now only 3 staff. No time to dedicate to system administration. • Having ability to change/update the system yourself is helpful to avoid cost of Tyler service, and you're not waiting on their timeline.
What was your training approach? What would you have done differently?	Tyler's training is exceptional; 3 weeks across 2 locations; staff onsite the first week to help with implementation.	The most successful element of implementation was their governing structure: they had 2 committees (1 core committee of dept heads (IT, CDD, PW, Parks Rec, Police Fire) to oversee budget and timeline and anything impactful; and 1 SME committee with reps from each division (planning, code, building, etc.) who were generally supervisors, managers, or experts to do the work (workflow, fees, reports, set up, custom fields). The City's PM ran both committees. They followed Tyler's training. They did the waterfall type of training (End user training at end; SME trng before that). 2 weeks total. Train the trainer was helpful if you have strong SMEs.		

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Other Speak to the challenges as PM and keeping things on track Issues w/r/t user adoption?	They instituted a project management-based approach to permitting. Individual departments no longer review only single aspects of development projects, house records in siloed data systems, and then pass applicants along to the next department. Instead, applications that involved multiple departments are assigned a project manager as a single point of contact.	Phil has no tech background. Stick to a PM that has "business systems analyst" experience – expertise on business flow (flow charts for diff processes). Now, Energov's system admin screen helps with the tech part. Have someone in IT to help (helpful, to learn it and figure out what we need to do). Need IT support that's 80% dedicated to the project. Very challenging if we don't get at least 50% dedicated IT person (who can learn the tech aspects of the software and back the PM up and knows what to do b/c there's overlap between PM and IT). This is critical. Its also helpful to have good support from city manager and directors. Tyler's online "Tyler Community" is a place to share ideas/questions; helpful. Annual conference April/May very helpful (show and tell what's coming, get to know other admins)	They are on-premises for the software.	