

FY 2027 Artificial Intelligence Items

Priority #	Department Improvement Title	One-Time Costs	Recurring Costs	Total Improvement Cost
FUND NUMBER: 0001				
06001 - INFORMATION TECHNOLOGY/0001 - ADMIN		NOT Included in the FY 2027 Recommended Budget		
1	Program Manager - AI Implementations	\$5,303.00	\$138,390.00	\$143,693.00
08020 - COUNTY COURT AT LAW CLERKS/0001 - ADMIN		NOT Included in the FY 2027 Recommended Budget		
2	Tyler AI Document Automation	\$156,695.00	\$190,025.00	\$346,720.00
23001 - DISTRICT CLERK/0001 - ADMIN		NOT Included in the FY 2027 Recommended Budget		
6	Tyler AI Assisted Case Filing Automation	\$156,695.00	\$190,025.00	\$346,720.00
10	AI Assisted Search Engine	\$0.00	\$143,000.00	\$143,000.00
0001 Fund TOTAL Budget Dept Neutral Items:		\$318,693.00	\$661,440.00	\$980,133.00
FUND NUMBER: 1025				
08040 - COUNTY CLERK RECORDS/0001 - ADMIN		NOT Included in the FY 2027 Recommended Budget		
2	Kleio Kofile AI Document Repository	\$0.00	\$132,000.00	\$132,000.00
1025 Fund TOTAL Budget Dept Neutral Items:		\$0.00	\$132,000.00	\$132,000.00
TOTAL Budget Dept Neutral Items:		\$318,693.00	\$793,440.00	\$1,112,133.00

FY 2027 Department Funding Request for a NEW Position

Department/Program #	Department Name / Program	Priority #	Department Improvement Title
06001-0001	06001 - INFORMATION TECHNOLOGY/0001 - ADMIN	1	Program Manager - AI Implementations

Budget Category, FINAL Recommendation and Comments		
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding	Comments (if any)
E-Workshop Discussion	Neutral	Will need this position if any of the AI softwares requested by the County and District Clerk are approved.

WHY is this position needed?

As departments seek out and begin to implement artificial intelligence and advanced analytics to improve service delivery, operational efficiency, and decision-making, these implementations will carry heightened requirements for transparency, security, privacy, and ethical use. Without centralized program oversight, AI efforts risk duplication, inconsistent governance, cost overruns, and exposure to legal or reputational risk.

The AI Implementation Program Manager is needed to provide coordinated leadership and governance across all AI-related initiatives, ensuring they are delivered in a controlled, compliant, and value-driven manner consistent with public sector mandates and legislation.

Current and (potentially) incoming AI initiatives include, but are not limited to:
 WebEx AI embedment - Current
 LaserFiche AI embedment - Incoming
 Microsoft CoPilot AI embedment - Potential with M365 pending budget approval
 Elastic AI embedment - Current
 SiteFinity (website AI embedment) - Incoming with new website
 County and District Clerk AI document automation - Potential pending budget approval

Additionally, with the onset and projected growth of agentic AI capabilities, this position would seek to identify and implement opportunities to build AI agents to absorb repetitive tasks and promote the ability to repurpose existing positions to higher-value workloads.

HOW will this position benefit your office and/or the County?

Strategic Alignment
 This position directly supports organizational goals related to improving service quality and accessibility for constituents, modernizing technology and data capabilities, strengthening data governance, ensuring responsible, transparent, and equitable use of emerging technologies, and maximizing return on public investment through coordinated planning and delivery.

Risk Management and Governance
 AI solutions introduce unique risks related to data quality, bias, explainability, and regulatory compliance. The AI Implementation Program Manager establishes consistent governance, oversight, and documentation practices across all AI initiatives, reducing the likelihood of unapproved or duplicate AI projects, non-compliance with privacy, operational failures due to inadequate deployment planning, and vendor dependency and unmanaged third-party risk. Centralized program management provides a defensible control structure appropriate for audit, legal review, and public accountability.

Cost Control and Resource Efficiency
 By coordinating AI initiatives and the Program level, this position improves fiscal stewardship by reducing redundant solutions and overlapping vendor contracts, enabling shared platforms, tools, and data assets across departments, improving forecasting, prioritization, and sequencing of AI investments, and supporting benefits realization and tracking performance measurement. This approach ensures limited public resources are allocated to initiatives with the highest impact and readiness.

Operational Readiness and Sustainability
 AI initiatives must be sustainable beyond the initial deployment. This role ensures solutions are transitioned into operations with appropriate support models, documentation, training, and ownership, reducing long-term operational risk and reliance on external vendors.

Is there statutory authority for this request?	N/A	Will this generate revenue?	of new positions throughout County	If Yes, potential amount?	
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Job Duties of NEW Position

Program Leadership and Governance - Own and manage AI implementation program consisting of various related projects and workstreams - Establish program-level governance, standards, and delivery frameworks for AI initiatives - Ensure alignment between AI initiatives, organizational strategy, funding, and business priorities.

Project and Portfolio Oversight - Provide oversight and project management knowledge - Monitor progress, risks, interdependencies, and resource utilization across the AI portfolio - Resolve cross-project issues and escalate risks that impact program objectives - Ensure consistent application of project management and reporting practices across AI initiatives.

Cross-Functional Coordination - Serve as the primary liaison between business leaders, IT, data science teams, security, legal, compliance, and vendors - Coordinate data, infrastructure, and integration dependencies across multiple AI solutions - Facilitate executive and steering committee communications, status reviews, and decision-making.

AI Delivery and Operational Readiness - Ensure AI solutions meet requirements for data governance, security, privacy, transparency, and ethical use - Oversee transition of AI solutions from development into production and ongoing operations - Support adoption, training, and change management activities related to AI capabilities - Ensure documentation standards are met, including model assumptions, limitations, and operational procedures.

Continuous Improvement - Lead post-implementation reviews and maturity assessments for AI capabilities - Identify opportunities to improve AI delivery processes, governance, and reuse of models or platforms - Promote best practices in responsible and scalable AI implementation.

NEW POSITION(S) REQUEST											
Requested Position Title	Requested Quantity	Requested Grade	Part-Time (20 hrs.) Full-Time (40 hrs.)	Requested Salary Per Position	Total Estimated Amount with Benefits	CORRECTED Salary	CORRECTED Position Title/Grade (match to job duties detailed above)	CORRECTED Salary with Benefits	FY 2027 Neutral Quantity	FY 2027 Neutral Amount	
AI Program Manager	1	517	Full-Time	\$96,393.00	\$136,861.00	\$96,393.00	IT Program Manager (AI)/517	\$136,861.00	1	\$136,861.00	
Requested NEW Position(s) Subtotal:					\$136,861.00	CORRECTED New Position(s) Subtotal:					\$136,861.00
NEUTRAL New Position(s) Subtotal:								\$136,861.00			

FY 2027 Department Funding Request for a NEW Position

Department/Program #	Department Name / Program	Priority #	Department Improvement Title
06001-0001	06001 - INFORMATION TECHNOLOGY/0001 - ADMIN	1	Program Manager - AI Implementations

FURNITURE, EQUIPMENT, TECHNOLOGY, ONE-TIME PURCHASES (ITEMS THAT NEED TO BE PRICED)											
Item Detailed Description	New / Replace	Quantity Requested	User Name and/or Job Title	Estimated Unit Cost	Estimated Total Requested	Unit Cost Provided by Purchasing	Updated Item Description (if applicable)	Neutral Quantity	FY 2027 Neutral Amount	FY 2026 Recommend Amount	
Computer - Tablet/Enhanced Laptop	New	1	AI PM	\$2,781.00	\$2,781.00	\$5,118.00	Computer - Enhanced Laptop	1	\$5,118.00	\$0.00	
Software - EA	New	1	AI PM	\$624.00	\$624.00	\$624.00	Software - EA	1	\$624.00	\$0.00	
Phone - Cell Phone Voice & Data	New	1	AI PM	\$130.00	\$130.00	\$130.00	Phone - Cell Phone Voice & Data	1	\$130.00	\$0.00	
Phone Service - Voice & Data	New	1	AI PM	\$509.00	\$509.00	\$509.00	Phone Service - Voice & Data	1	\$509.00	\$0.00	
MiFi Device	New	1	AI PM	\$55.00	\$55.00	\$55.00	MiFi Device	1	\$55.00	\$0.00	
MiFi Service	New	1	AI PM	\$396.00	\$396.00	\$396.00	MiFi Service	1	\$396.00	\$0.00	
Request submitted by Ben White					\$0.00				\$0.00	\$0.00	
Estimated Requested Equipment Subtotal:					\$4,495.00	Neutral Equipment Subtotal:					\$6,832.00

Total Estimated Department Request:	\$141,356.00
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Updated Total Department Request:	\$143,693.00
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NEUTRAL Total Department Request Utilizing FY 2027 Funds:	\$143,693.00
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RECOMMENDED Total Department Request Utilizing FY 2026 Funds:	\$0.00
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Notes to Purchasing Department (part numbers, equipment specifications, where you found the item, etc.)

ANALYSIS					
Q & A Discussions with Department					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Christina Divers	3/10/2026	Due 3-25-26	3/17/2026	Ben White	

Questions TO Department	Response From Department
Some of the AI Initiatives listed say current and incoming. How are you handling those today without this position?	There is currently no centralization in the management of them. Disparate teams and departments are trying to find their way through it without real guidance or organization. AI is coming, it will undoubtedly change the way the world does business, and the sooner we contain it and promote it in an organized manner, the better-positioned Collin County will be to modify processes and gain efficiency.
Will this position strictly focus on AI?	Managing AI implementations and identifying opportunities for net-positive ROI and business value return using Artificial Intelligence will be the dominant function of this role.
If this position is not adopted, how will it impact the County?	I can confidently say that Collin County will fall behind the curve in the adoption and implementation of artificial intelligence if we do not adopt this position. Current staff is already spread too thin to consider giving such a revolutionary task to existing personnel. Additionally the risk of shadow AI is growing exponentially resulting in possible data security issues and departmental silos of AI costing more than enterprise solutions.
Will you need additional training funds for this new position?	I believe existing Departmental training funds will be sufficient but I would expect an incumbent to participate in regular training and certifications as AI continues to mature and an increasingly rapid pace.
Do you have a place for this position to sit? Will they need furniture, if so what?	There is currently cubicle space available for this position. Hardware and software requirements are outlined in the budget request.
Can these not be handled like any other project by a project manager or the existing programs manager?	We do not have the capacity to take on an additional program without adding staff. We currently only have one Program Manager and that person is responsible for managing the ERP program, a full-time job in itself. Program Managers do not manage multiple programs. If we are to absorb the adoption of artificial intelligence the right way, then we need an AI Program Manager who can keep it all centralized, organized, and prevent overlap of initiatives.

Q & A Discussions with IT					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
IT			3/31/2026	Ben White	

Questions to IT	Response From IT
Is there any other software that requires a license that this position might need? Example - Adobe Pro?	BW - Not in the initial year. As I learn more about Artificial Intelligence, I learn various applications that are used by AI professionals in the industry. LucidChart is a diagramming software (similar to Visio but much more robust) that I pay out-of-pocket for approximately \$11/month. Python is the dominant programming language used in AI but I do not expect any subscription costs in year 1. The first year will focus primarily on training that can be absorbed by the existing training budget.



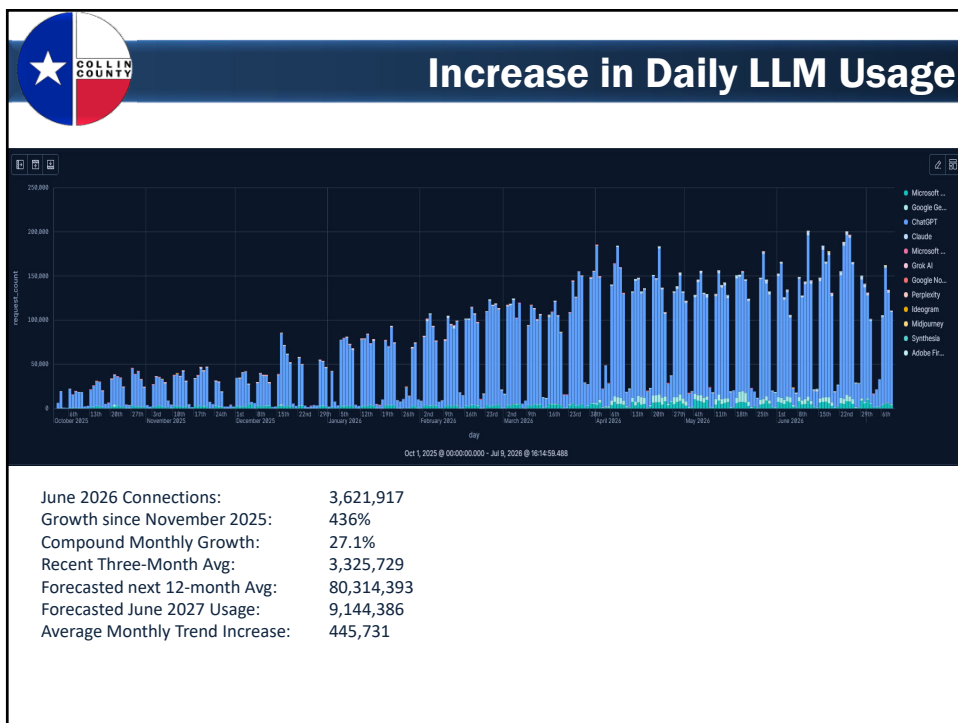
Why This Matters Now

- AI adoption is already occurring across departments
- Unmanaged AI introduces legal, fiscal, and reputational risk
- Structured governance ensures taxpayer value and compliance
- Opportunity to reduce long-term staffing growth pressures



Tools Adopted or Being Explored

- WebEx AI embedment – Current
- LaserFiche AI embedment – Cloud-native
- Microsoft CoPilot AI embedment – Pending M365 Budget Request
- Elastic AI embedment – Current
- SiteFinity AI embedment – Current
- County/District Clerk AI document automation – Pending Budget Approval
- County Clerk AI indexing – Current
- Enterprise Anthropic licensing - Exploring
- AI translation services – Exploring
- AI voice agents – Exploring
- EnerGov Decision Engine - Implementing





Position Request: AI Program Manager

- Enterprise authority for AI governance and portfolio oversight
- Owns AI strategy alignment with county priorities
- Ensures compliance with Texas law and policy
- Accountable for measurable ROI and risk mitigation



Core Responsibilities

- AI intake, prioritization, and business case evaluation
- Risk classification and responsible AI oversight
- Vendor and contract governance
- Executive reporting and performance tracking



Proposed Governance Structure

- Commissioners Court / Executive Leadership
- AI Steering Committee (Legal, IT, Audit, Operations)
- AI Program Manager (central authority)
- Departmental project teams



AI Governance Maturity Levels

- Level 1 – Unregulated Experimentation
- Level 2 – Awareness & Containment
- Level 3 – Structured Governance
- Level 4 – Enterprise & Interagency Integration
- Level 5 – Institutionalized Public Trust Model



5-Year Maturity Roadmap

- Year 1: Structured Governance (policy, intake, oversight)
- Years 2–3: Enterprise integration (ERM, audit, ROI tracking)
- Years 4–5: Public trust model (transparency, reporting, optimization)



Expected Outcomes

- Reduced operational costs and staffing growth
- Improved service delivery speed and accuracy
- Stronger audit and compliance posture
- Transparent reporting of AI value to taxpayers



Request

- Approve AI Program Manager Position
- Establish governance structure immediately
- Target Level 3 maturity within 12 months



Appendix: Texas Statutory Alignment

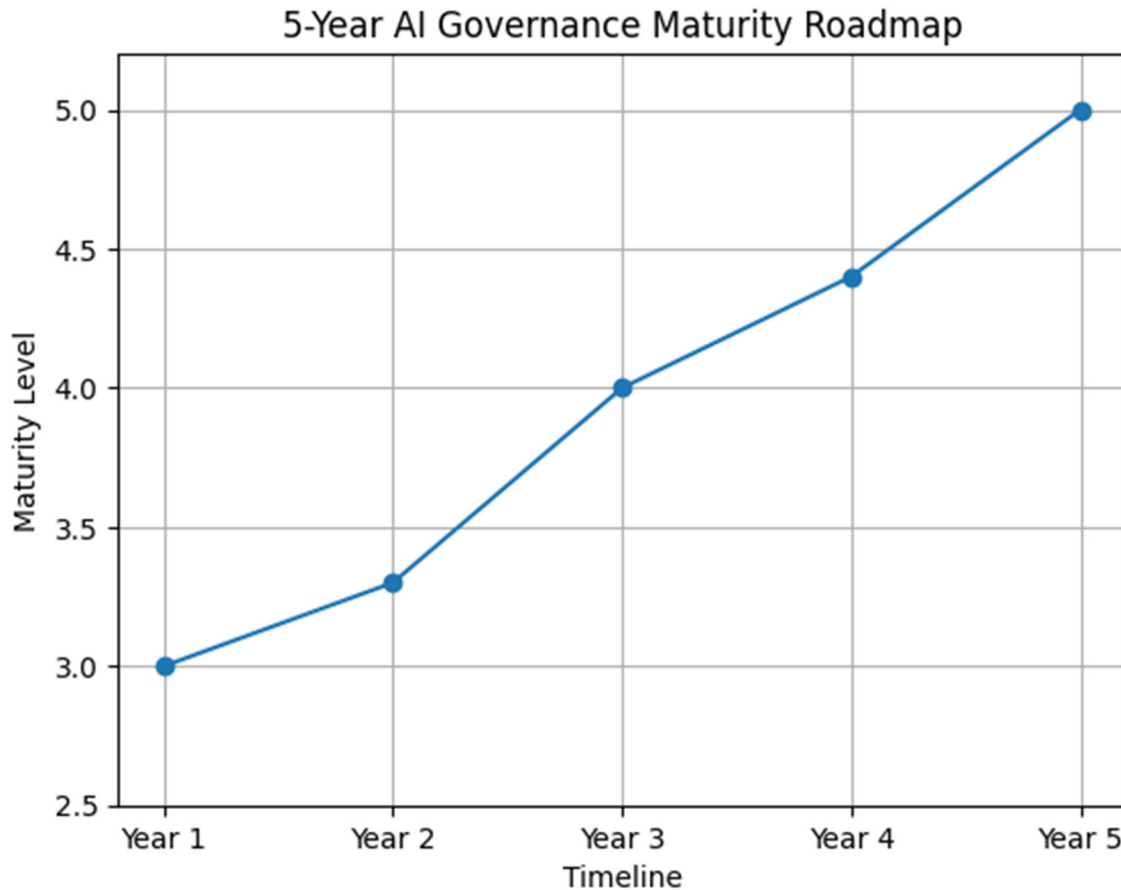
- SB 1964 took effect on September 1, 2025 – created Government Code Chapter 2054’s public-sector AI framework.
- HB 3512 took effect on September 1, 2025 – created annual AI awareness training obligation.
- HB 149 – Texas Responsible Artificial Governance Act (TRIAGA) took effect January 1, 2026.
- DIR’s TAC Chapter 219 took effect March 18, 2026.

AI Program Governance Comprehensive 5-Year Maturity Plan

Executive Summary

This document presents a comprehensive five-year roadmap to establish, mature, and institutionalize an AI Program Management function within the Collin County technology ecosystem. The plan is designed to ensure artificial intelligence initiatives deliver measurable taxpayer value, align with statutory and regulatory requirements, and remain secure, auditable, and transparent. The approach progresses from foundational governance to enterprise integration and ultimately to a public trust model.

5-Year Roadmap Overview



<u>Year</u>	<u>Focus</u>	<u>Key Outcomes</u>	<u>Maturity</u>
Year 1	Foundation & Control	Governance established, early ROI	Level 3
Year 2	Standardization	Repeatable lifecycle, ROI tracking	Level 3+
Year 3	Enterprise Integration	ERM + audit integration	Level 4
Year 4	Optimization	Monitoring + interagency alignment	Level 4+
Year 5	Public Trust	Transparency + independent oversight	Level 5 (partial)

Year 1 – Establish Structured Governance

- Establish AI Program Manager and Steering Committee
- Develop AI policy aligned with TPIA, TAC 202, and records retention
- Implement AI intake and scoring model (value, risk, feasibility, data readiness)
- Define AI risk tiers and human-in-the-loop controls
- Deploy 2–3 high-value use cases (document processing, summarization)
- Ensure all AI initiatives are governed and auditable

Year 2 – Standardization & Scale

- Implement stage-gate lifecycle (intake → pilot → production → scale)
- Formalize ROI tracking and quarterly reporting
- Define enterprise AI architecture and approved platforms
- Establish AI procurement and vendor governance standards
- Expand training and AI literacy across departments

Year 3 – Enterprise Integration

- Integrate AI into enterprise risk management and audit programs
- Establish enterprise AI portfolio dashboard
- Align AI initiatives with strategic planning and budgeting cycles
- Implement automated logging, monitoring, and records retention integration
- Track KPIs (cost avoidance, efficiency, adoption)

Year 4 – Optimization & Alignment

- Implement continuous monitoring and model performance tracking
- Enable interagency collaboration and shared standards
- Integrate AI funding into budget and capital planning processes
- Define workforce transformation and reskilling strategies
- Expand enterprise-wide adoption

Year 5 – Public Trust Model

- Publish AI transparency statements and use disclosures
- Establish independent AI audit/review capability
- Implement predictive AI opportunity identification
- Benchmark against peer organizations
- Continuously update governance policies based on evolving regulations

Year 1 Implementation Playbook

Governance

- Define charter for AI Steering Committee
- Assign clear authority to AI Program Manager
- Establish meeting cadence and reporting structure

Policy & Legal

- Draft and approve AI acceptable use and governance policies
- Ensure compliance with Texas statutes and audit requirements
- Define AI decision boundaries (human oversight)

Portfolio Management

- Build intake workflow and prioritization scoring tool
- Develop standardized business case template
- Identify pilot projects with measurable ROI

Risk & Security

- Define AI risk classification tiers
- Implement security review aligned with TAC 202
- Establish documentation and audit trail requirements

Quick Wins

- Deploy 2–3 early use cases with clear metrics
- Focus on operational efficiency and cost avoidance
- Document results for executive reporting

Metrics

- 100% intake governance coverage
- Initial ROI demonstrated
- Reduction in manual workload
- Executive visibility established

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title		
08020-0001	08020 - COUNTY COURT AT LAW CLERKS/0001 - ADMIN	2	Tyler AI Document Automation		

Budget Category, FINAL Recommendation and Comments		
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding	Comments (if any)
E-Workshop Discussion	Neutral	Discuss direction of AI use in the County during Budget Workshop.

WHY is this request needed?

As Collin County continues to experience rapid and sustained growth, so do the County Court at Law Clerk's Office in the number of filings they receive and are required to process each year. Currently, accepting filings and handling are manual processes requiring complete human intervention, even when filings are received electronically. Staff are required to review documents, verify completeness, classify case types, extract key data elements, and route items to the appropriate Courts or division. These repetitive, rules-based tasks consume a significant portion of clerk’s time and introduce opportunities for human error, processing delays, and inconsistent data quality. Absent technological intervention, continued population growth will necessitate additional full-time clerk positions in order to maintain statutory processing timeline and service levels.

WHAT are you requesting?

The County Court at Law Clerk Office is requesting an AI-enabled document automation solution provided by Tyler Technologies. This solution intends to deploy a secure, government-compliant AI platform capable of:

- Automatically ingesting electronic and scanned paper filings
- Classifying document types based on learned patterns and defined business rules
- Extracting structured data fields
- Validating required elements and flagging exceptions
- Routing documents to appropriate queues or Odyssey workflows
- Generating audit logs for transparency, traceability, and compliance

This system will operate under human-in-the-loop oversight, ensuring clerk review of exceptions and maintaining accountability for official records. The initiative will not replace statutory authority or decision-making functions of Clerk staff. Rather, it will automate high-volume, repetitive processing steps that currently consume staff capacity. The solution is offered with unlimited processing resources - meaning an unlimited number of document pages on an annual basis. It also includes unlimited docket code configuration within the included number of professional services hours provided in the investment summary.

HOW will this benefit your office and/or the County?

- Improved processing timeliness
- Enhanced data accuracy and consistency
- Staff redeployment to high-value functions
- Scalability for future growth
- Lower error-correction and rework costs
- Increased operational productivity per employee

Funding this initiative will modernize critical public-facing operations, enhance transparency and data integrity, and ensure the County remains scalable, efficient, and responsive to continued growth.

	LGC 191.001, 192.006 and 195		It could be argues that it can indirectly through workload obsorption and redeployment of existing staff		Based off comparisons from other Counties using AI, there is a repurposed of staff or no additional staff needed
Is there statutory authority for this request?		Will this generate revenue?		If Yes, potential amount?	

FURNITURE, EQUIPMENT, TECHNOLOGY, ONE-TIME PURCHASES (ITEMS THAT NEED TO BE PRICED)										
Item Detailed Description	New / Replace	Quantity Requested	User Name and/or Job Title	Estimated Unit Cost	Estimated Total Requested	Unit Cost Provided by Purchasing	Updated Item Description (if applicable)	Neutral Quantity	FY 2027 Neutral Amount	Recommended FY 2026 Amount
Tyler AI Document Automation SaaS Fee (Year 1)	New	1		\$172,750.00	\$172,750.00	\$380,050.00	Split cost between County and District Clerk	1	\$190,025.00	\$0.00
County Clerk Implementation and Configuration (Year 1)	New	1		\$71,250.00	\$71,250.00	\$156,695.00		1	\$156,695.00	\$0.00
Estimated Requested Equipment Subtotal:					\$244,000.00		Neutral Equipment Subtotal:		\$346,720.00	\$0.00
Total Estimated Department Request:					\$244,000.00		Updated Total Department Request:		\$536,745.00	
							NEUTRAL Total Department Request Utilizing FY 2027 Funds:		\$346,720.00	
							RECOMMENDED Total Department Request Utilizing FY 2026 Funds:		\$0.00	

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title		
08020-0001	08020 - COUNTY COURT AT LAW CLERKS/0001 - ADMIN	2	Tyler AI Document Automation		
ANALYSIS					
Q & A Discussions with Department					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Brenda	3/26/2026	Email	3/31/2026	Brenda G.	Email
Questions TO Department			Response From Department		
If approved, would this tool entirely replace the job functions of any of your current staff to the point that some positions could be eliminated?			No		
If you had to guess - how much time on average (per day or week) would this software "give back" to the clerks to be able to perform their other functions?			If I had to guess, this software would save approximately 2 to 3 hours per day due to automating the repetitive document processing. We predict during the initial implementation phase, impact will be more gradual due to the limitation of deploying only 10 codes within the first year. By reducing the repetitive, high-volume tasks, personnel will be able to focus on the more complex responsibilities that improve accuracy and overall service. Overall, this software represents a strong opportunity to improve operational efficiency, optimize staff productivity and support higher-value work.		
Q & A Discussions with IT					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
				Ben W.	
Questions to IT			Response From IT		
Would IT assist in the implementation of this new platform?			BW - This would be assigned to the AI Program Manager position that is requested in the FY27 budget.		
If yes, does IT have the bandwidth to work on this project?			BW - IT has capacity assuming we are given the AI Program Manager position that is requested in the FY27 budget.		
Does IT have any concerns about this request?			BW - The number of AI requests in this year's - and assuming future years - dictate the need for program governance and control.		
Anything else we may need to know about this request - or things to add for Purchasing to price?					
Q & A Discussions with Purchasing					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Hunter	5/15/2026	Email	5/20/2026	Hunter	Email
Questions to Purchasing			Response From Purchasing		
Is the SaaS price of \$380,050 for both the County and District Clerk’s Office – one price for both?			\$380,050 is the cost for both District and County Clerk – Tyler didn’t itemize the SaaS fee.		

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title		
23001-0001	23001 - DISTRICT CLERK/0001 - ADMIN	6	Tyler AI Assisted Case Filing Automation		

Budget Category, FINAL Recommendation and Comments		
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding	Comments (if any)
E-Workshop Discussion	Neutral	Discuss direction of AI use in the County during Budget Workshop.

WHY is this request needed?

Currently, filing intake and handling are manual processes requiring complete human intervention, even when filings are received electronically. Staff are required to review document, verify completeness, classify case types, extract key data elements, assign docket codes, and route items to the appropriate Court or division. These repetitive, rules-based tasks consume a significant portion of clerk time and introduce opportunities for human error, processing delays, and inconsistent data quality. Absent technological intervention, continued population growth will necessitate additional full-time clerk positions in order to maintain statutory processing timeline and service levels.

WHAT are you requesting?

The District and County Clerk Offices are requesting an AI-enabled document automation solution provided by Tyler Technologies. This solution intends to deploy a secure, government-compliant AI platform capable of:

Automatically ingesting electronic and scanned paper filings
Classifying document types based on learned patterns and defined business rules
Extracting structured data fields
Validating required elements and flagging exceptions
Routing documents to appropriate queues or Odyssey workflows
Generating audit logs for transparency, traceability, and compliance

This system will operate under human-in-the-loop oversight, ensuring clerk review of exceptions and maintaining accountability for officials records. The initiative will not replace statutory authority or decision-making functions of Clerk staff. Rather, it will automate high-volume, repetitive processing steps that currently consume staff capacity. The solution is offered with unlimited processing resources - meaning an unlimited number of document pages on an annual basis. It also includes unlimited docket code configuration within the included number of professional services hours provided in the investment summary

HOW will this benefit your office and/or the County?

Workload absorption without proportional staffing growth
Improved processing timeliness
Enhanced data accuracy and consistency
Staff redeployment to high-value functions
Scalability for future growth
Lower error-correction and rework costs
Increased operational productivity per employee

Funding this initiative will modernize critical public-facing operations, enhance transparency and data integrity, and ensure the County remains scalable, efficient, and responsive to continued growth.

Is there statutory authority for this request?	Local Government Code 191.001, 192.006 and 195	Will this generate revenue?	It could be argued that it can indirectly through workload absorption and redeployment of existing staff	If Yes, potential amount?	Using the Dallas County Clerk's Office as a baseline, they repurposed 6 clerk positions as a result of implementing this system.
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FURNITURE, EQUIPMENT, TECHNOLOGY, ONE-TIME PURCHASES (ITEMS THAT NEED TO BE PRICED)										
Item Detailed Description	New / Replace	Quantity Requested	User Name and/or Job Title	Estimated Unit Cost	Estimated Total Requested	Unit Cost Provided by Purchasing	Updated Item Description (if applicable)	Neutral Quantity	FY 2027 Neutral Amount	Recommended FY 2026 Amount
AI Document Automation SaaS fees:	New	1		\$354,500.00	\$354,500.00	\$190,025.00	Split cost between County and District Clerk	1	\$190,025.00	\$0.00
District Clerk Implementation and Configuration	New	1		\$142,500.00	\$142,500.00	\$156,695.00		1	\$156,695.00	\$0.00
Estimated Requested Equipment Subtotal:					\$497,000.00		Neutral Equipment Subtotal:	\$346,720.00	\$0.00	
Total Estimated Department Request:						\$497,000.00	Updated Total Department Request:		\$346,720.00	
							NEUTRAL Total Department Request Utilizing FY 2027 Funds:		\$346,720.00	
							RECOMMENDED Total Department Request Utilizing FY 2026 Funds:		\$0.00	

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title		
23001-0001	23001 - DISTRICT CLERK/0001 - ADMIN	6	Tyler AI Assisted Case Filing Automation		

ANALYSIS

Q & A Discussions with Department					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Brenda G	4/9/2026	Email	4/14/2026	Brenda G	Email

Questions TO Department	Response From Department
I will be removing the pricing for County Clerk's Office as it is not applicable to your office. (They requested on their own packet).	
If approved, would this tool entirely replace the job functions of any of your current staff to the point that some positions could be eliminated?	At this time, no. The Tyler AI tool would not fully replace any existing staff positions. The core responsibilities of District Clerk staff—such as reviewing filings for compliance, maintaining the official court record, ensuring accuracy of case indexing, and supporting court operations—require human judgment, accountability, and statutory responsibility that cannot be delegated to automation. The AI tool is best viewed as an augmentation resource, not a replacement. It would assist with tasks such as document classification, data extraction, and preliminary indexing, but all outputs would still require clerk verification to ensure legal accuracy and completeness. Over time, as the tool matures and efficiencies are realized, it may reduce the need for additional future staffing requests. However, it would not eliminate the need for current personnel.
If you had to guess - how much time on average (per day or week) would this software "give back" to the clerks to be able to perform their other functions?	Based on current workflows, we estimate the tool could return approximately: 1.5 to 3 hours per clerk per day (or roughly 7–15 hours per week per clerk) This estimate is based on time currently spent on: Manual document review and classification Data entry and indexing into Odyssey Cross-referencing filings with case records Routine quality control checks By automating or accelerating these repetitive tasks, clerks would be able to redirect time toward: Quality assurance and audit functions Backlog reduction Customer service and front-facing support More complex case processing requiring judgment This represents a meaningful operational efficiency gain without reducing necessary oversight.
If this request was approved - do you expect that you would still need all the positions requested in this packet since this software should allow you to reassign existing staff?	Yes, we would still anticipate the need for the positions requested. While the Tyler AI tool would improve efficiency, it does not reduce the overall workload volume or statutory obligations of the office. Filing volumes, court activity, and compliance requirements continue to grow, and staffing needs are driven primarily by those demands. The efficiencies gained would allow us to: Better absorb increasing caseloads Improve turnaround times Strengthen quality control and auditing processes Reduce operational risk and errors Rather than eliminating positions, the tool would help ensure that both existing and newly requested staff can operate at a higher level of effectiveness. In summary, this request should be viewed as capacity-enhancing, not position-reducing. It allows the office to scale responsibly and maintain service levels as demand increases.

Q & A Discussions with IT

Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
				Ben W.	

Questions to IT	Response From IT
Would IT assist in the implementation of this new platform?	BW - This would be assigned to the AI Program Manager requested in the FY27 budget.
If yes, does IT have the bandwidth to work on this project?	BW - Yes, if IT is given the AI Program Manager position requested in the FY27 budget.
Does IT have any concerns about this request?	BW - The number of AI requests in this year's - and assuming future years - budgets dictates the need for AI program governance and control.
Anything else we may need to know about this request - or things to add for Purchasing to price?	No

Q & A Discussions with Purchasing

Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment

Questions to Purchasing	Response From Purchasing
The County Clerk's Office requested this software in their CCL packet. Is the price provided the total cost for both County and District Clerk - or is the pricing provided broken down by department?	The Tyler proposal includes a SaaS cost for both County and District Clerk with only the annual recurring professional services being itemized between the County and District Clerk. HA

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title
23001-0001	23001 - DISTRICT CLERK/0001 - ADMIN	10	AI Assisted Search Engine for Historical Records Management

Budget Category, FINAL Recommendation and Comments		
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding	Comments (if any)
E-Workshop Discussion	Neutral	Discuss direction of AI use in the County during Budget Workshop.

WHY is this request needed?

When doing an online sarch for documents that have been scanned into Laserfische for the District Clerk's office and those that exist on microfilm, there is no indexed repository that is searchable by the citizen's of Collin County to access historical case files online. Currently, one would need to email or come into the District Clerk's office, submit a written requeest for records and then wait for this office to research the document, produce a copy and return them to the requestor. We do collect fees for copies, at this time there is no online pay portal for the community to access to pay copy fees remotely, they must mail in their payment or physically come in and pay in person.

WHAT are you requesting?

KleioSM is Kofile's AI-driven Document Intelligence & Engagement Platform (powered by AWS).

Kleio offers classification and extraction, intelligent and multi-lingual search and conversational abilities (including summarization) and full integration with all other top-of-field PaaS and SaaS platforms.

Additionally, Kleio provides counties and cities with:

Support for all Record Types: Kleio can process property, land, vital, probate, case files, meeting minutes, etc., seamlessly supporting both physical/legacy files along with more modern digital sources and/or rich media

Fee-based, Citizen Self-Service Portal: for at-home public records access, document requests, and translation

Back-office Support: to clear queues and streamline workflows, enable bulk processing, provide timely alerts, etc., allowing staff to focus on higher level tasks

Government-grade Compliance and Security: to include encrypted data pipelines, role-based control(s), and audit trails

As a fully end-to-end solution, Kofile's Kleio is the future of record modernization through living intelligence.

HOW will this benefit your office and/or the County?

The benefit is solely on that of the citizens of Collin County by allowing instant access to

FURNITURE, EQUIPMENT, TECHNOLOGY, ONE-TIME PURCHASES (ITEMS THAT NEED TO BE PRICED)										
Item Detailed Description	New / Replace	Quantity Requested	User Name and/or Job Title	Estimated Unit Cost	Estimated Total Requested	Unit Cost Provided by Purchasing	Updated Item Description (if applicable)	Neutral Quantity	FY 2027 Neutral Amount	Recommended FY 2026 Amount
AI Document Automation SaaS fees:	New	1		\$298,900.00	\$298,900.00	\$143,000.00	AI Document Automation SaaS fees:	1	\$143,000.00	\$0.00
District Clerk Implementation and Configuration	New	1		\$142,400.00	\$142,400.00	\$0.00	Per Purchasing, no implementation fees. SaaS model only.	0	\$0.00	\$0.00
Estimated Requested Equipment Subtotal:							Neutral Equipment Subtotal:		\$143,000.00	\$0.00
Total Estimated Department Request:							Updated Total Department Request:		\$143,000.00	
NEUTRAL Total Department Request Utilizing FY 2027 Funds:										\$143,000.00
RECOMMENDED Total Department Request Utilizing FY 2026 Funds:										\$0.00

ANALYSIS					
Q & A Discussions with Department					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Cindy W.	4/9/2026	Email	5/28/2026	Tammy M.	Email

Questions TO Department	Response From Department
Do you keep track of how many records request you get each year?	FY 25 Civil/Family – 7826 Criminal – 3570 Juvenile – 0 Magistrate – 1720 FY 26 to date Civil/Family – 4899 Criminal – 2602 Juvenile – 0 Magistrate - 1431
Would this generate revenue? If so, how much do you charge for these types of record requests?	We do charge a copy fee, Mindi and I are trying to figure out how to break that down the match the numbers listed above. Some criminal copy requests are taken in as a misc. payment as there is no case number to attach to because it is pre-indictment. However, all funds do go directly into the general fund.

Q & A Discussions with IT					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
				Ben W.	

Questions to IT	Response From IT
Would IT assist in the implementation of this new platform?	I am unfamiliar with any of the discovery that has been done to date for this product. However, this would be assigned to the AI Program Manager position that has been requested in the FY27 budget.
If yes, does IT have the bandwidth to work on this project?	Yes, assuming IT is given the AI Program Manager position requested in the FY27 budget.
Does IT have any concerns about this request?	The number of AI requests in this year's - and assuming future years - budgets dictates the need for AI program governance and control.
Anything else we may need to know about this request - or things to add for Purchasing to price?	

Q & A Discussions with Purchasing					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment

Questions to Purchasing	Response From Purchasing
The County Clerk's Office requested Kleio in their 1025 packet. Is the price provided for both departments or has this been broken down by department?	Yes., this is broken down by department. The District Clerk and County Clerk has received their own respective Kleio AI proposals. HA

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title		
08040-0001	08040 - COUNTY CLERK RECORDS/0001 - ADMIN	2	Kleio Kofile AI Document Repository		

Budget Category, FINAL Recommendation and Comments					
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding		Comments (if any)		
E-Workshop Discussion	Neutral		Discuss direction of AI use in the County during Budget Workshop.		

WHY is this request needed?

Currently, all historical and current documents are not available online for the public nor are the records readily searchable in their current form.
By moving these records to this new platform, the public will have access to all available documents and will be searchable using new AI-driven document intelligence and engagement that transforms preserved records into living civic assets.
Kleio-Kofile AI Repository is a comprehensive solution to preserve, organize and provide user-friendly public access to our historical and official records. Additionally, Kleio will provide an online reproduction of the preserved books, allowing users to access their contents digitally while safeguarding the original volumes from wear and deterioration.

WHAT are you requesting?

The County Clerk Office is requesting an AI-enabled document repository provided by Kofile Technologies. This solution intends to deploy a secure, government-compliant AI platform capable of:
Automatically ingesting electronic and scanned documents
Classifying document based on learned patterns
Extracting information within documents
Making handwritten documents, some undecipherable, available to the public
Paving the way for a single source repository for historical and public documents
Reduced staff workload for manual searches
Long term digital preservation of county records
Enhanced disaster recovery protection.

HOW will this benefit your office and/or the County?

Kleio will digitally preserve all record books. This will ensure long-term protection of fragile and historical documents. The platform will develop multiple organized collections allowing records to be grouped into clearly defined categories such as:
Deed Records
Probate Records
Court Records
Commissioners Court Minutes
Historical Archives
Each collection will be accessible online and searchable independently or collectively.
Kleio will improve public access by providing 24/7 access for customers and reduce in-person traffic and staff research time. Faster access and processing leads to higher citizen satisfaction and improved transparency.
AI automatically identifies document types (e.g., invoices, deeds, or permits) and applies appropriate metadata tags. This eliminates manual sorting and ensures consistent organization across thousands of files.
The platform can provide deep content insight into documents that has not been available to this point.
Kleio is a sole-source product and the only solution of its kind currently available on the market.

Is there statutory authority for this request?		Will this generate revenue?		If Yes, potential amount?	
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FURNITURE, EQUIPMENT, TECHNOLOGY, ONE-TIME PURCHASES (ITEMS THAT NEED TO BE PRICED)										
Item Detailed Description	New / Replace	Quantity Requested	User Name and/or Job Title	Estimated Unit Cost	Estimated Total Requested	Unit Cost Provided by Purchasing	Updated Item Description (if applicable)	Neutral Quantity	FY 2027 Neutral Amount	Recommended FY 2026 Amount
Kleio Kofile AI Document Repository	New	1			\$0.00	\$132,000.00	Kleio Kofile AI Document Repository	1	\$132,000.00	\$0.00
Estimated Requested Equipment Subtotal:						\$0.00	Neutral Equipment Subtotal:		\$132,000.00	\$0.00
Total Estimated Department Request:						\$0.00	Updated Total Department Request:		\$132,000.00	
						NEUTRAL Total Department Request Utilizing FY 2027 Funds:		\$132,000.00		
						RECOMMENDED Total Department Request Utilizing FY 2026 Funds:		\$0.00		

ANALYSIS					
Q & A Discussions with Department					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Brenda G.	3/23/2026	Email	3/23/2026	Brenda G.	Email
Questions TO Department			Response From Department		
Would this be replacing another software (potential savings to the county/records fund)?			No		
Would this generate revenue?			This may be an option in the future.		
Will the clerks be scanning in current and historical documents into this new platform or will the vendor be doing this?			It is our understanding that we will be required to upload or provide the documentation for the Kleio site.		
How wil this impact the staff's current workload? Do they have the bandwidth to take on these additional duties?			As of right now, it's too early to tell. This is a new product that has never been used before, therefore, there may be a need for additional personnel in the future.		
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Brenda G.	5/14/2026	Email			
Questions TO Department			Response From Department		
When we sent the packet to IT they came back with this question. Are you able to answer it?					

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title		
08040-0001	08040 - COUNTY CLERK RECORDS/0001 - ADMIN	2	Kleio Kofile AI Document Repository		
Q & A Discussions with IT					
Sent To:	Date Sent	Comment		Responder's Name	Comment
				Ben W.	
Questions to IT			Response From IT		
Would IT assist in the implementation of this new platform?			IT would assist to the extent needed. This would be assigned to the requested AI Program Manager to assist with implementation and governance.		
If yes, does IT have the bandwidth to work on this project?			Yes, provided we are granted the requested resources to oversee AI in the County.		
Does IT have any concerns about this request?			Is the AI model proprietary or is it using an off-the-shelf LLM, such as Anthropic or OpenAI? If not proprietary, what are the assurances that sensitive records, such as Court or Probate records, do not show up in external LLM chats?		
Anything else we may need to know about this request - or things to add for Purchasing to price?			None at this time.		
Q & A Discussions with Audit					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Robert C.	5/28/2026		6/1/2026	Robert C	Email
Questions to Purchasing			Response From Purchasing		
Is this an allowable expense?			Management and preservation of records, including records management automation initiatives, are eligible expenditures of funds derived from fees collected under Texas Local Government Code §118.0216. Accordingly, this project constitutes an allowable expenditure from Fund 1025.		