

EXHIBIT

"A"

**CITY OF ROUND ROCK
PROFESSIONAL CONSULTING SERVICES AGREEMENT
FOR THE IMPLEMENTATION OF CITYWORKS PERMIT,
LICENSING AND LAND SOFTWARE
WITH
TIMMONS GROUP**

THE STATE OF TEXAS

§

CITY OF ROUND ROCK

§

KNOW ALL BY THESE PRESENTS:

COUNTY OF WILLIAMSON

§

COUNTY OF TRAVIS

§

§

THAT THIS AGREEMENT for professional consulting services related to the implementation of CityWorks Permit, Licensing, and Land (PLL) Software, and for related goods and services (referred to herein as the "Agreement"), is made and entered into on this the _____ day of the month of _____, 2021 by and between the **CITY OF ROUND ROCK**, a Texas home-rule municipality, whose offices are located at 221 East Main Street, Round Rock, Texas 78664-5299 (referred to herein as the "City"), and **TIMMONS GROUP**, whose offices are located at 1001 Boulders Parkway, Suite 300, Richmond, VA 23225 (referred to herein as "Consultant"), collectively the parties to the Agreement (referred to herein as "Parties").

RECITALS:

WHEREAS, professional consulting services related to the implementation of CityWorks Permit, Licensing, and Land (PLL) Software are desired by the City; and

WHEREAS, City desires to contract with Consultant for such professional consulting services; and

WHEREAS, the parties desire to enter into this Agreement to set forth in writing their respective rights, duties and obligations hereunder.

NOW, THEREFORE, WITNESSETH:

That for and in consideration of the mutual promises contained herein and other good and valuable consideration, the sufficiency and receipt of which are hereby acknowledged, it is mutually agreed between the parties as follows:

1.0 EFFECTIVE DATE AND TERM

A. This Agreement shall be effective on the date this Agreement has been signed by each party hereto, and shall remain in full force and effect unless and until it expires by operation of the term indicated herein, or is terminated or extended as provided herein.

B. The term shall be for three (3) years from the effective date of this Agreement.

C. City and the Consultant reserve the right to review the Agreement at any time, and may elect to terminate the Agreement with or without cause or may elect to continue.

2.0 SCOPE OF SERVICES

Consultant has issued its proposal for services, such proposal for services being attached to this Agreement as Exhibit "A" titled "Scope of Services," which shall be referred to as the Scope of Services of this Agreement and incorporated herein by reference for all purposes.

Consultant shall satisfactorily provide all services described herein and as set forth in Exhibit "A." Consultant shall perform services in accordance with this Agreement, in accordance with the appended Scope of Services and in accordance with due care and prevailing consulting industry standards for comparable services.

3.0 LIMITATION TO SCOPE OF SERVICES

Consultant's undertaking shall be limited to performing services for City and/or advising City concerning those matters on which Consultant has been specifically engaged. Consultant and City agree that the Scope of Services to be performed is enumerated in Exhibit "A" and herein, and may be increased during the term of the Agreement to include financial services in addition to Purchasing Card Services, but only with a written Supplemental Agreement executed by both parties as described in Section 9.0.

4.0 CONTRACT AMOUNT

In consideration for the professional consulting services to be performed by Consultant, City agrees to pay Consultant an amount not-to-exceed **Four Hundred Eighteen Thousand Seven Hundred Ninety and No/100 Dollars (\$418,790.00)** to be paid as set forth in Exhibit "A" and herein.

5.0 INVOICE REQUIREMENTS; TERMS OF PAYMENT

Invoices: To receive payment, Consultant shall prepare and submit detailed invoices to the City, in accordance with the delineation contained herein, for services rendered. Such invoices for professional services shall track the referenced Scope of Work, and shall detail the services performed, along with documentation for each service performed. Payment to Consultant shall be made on the basis of the invoices submitted by Consultant and approved by the City. Such invoices shall conform to the schedule of services and costs in connection therewith.

Should additional backup material be requested by the City relative to service deliverables, Consultant shall comply promptly. In this regard, should the City determine it necessary, Consultant shall make all records and books relating to this Agreement available to

the City for inspection and auditing purposes.

Payment of Invoices: The City reserves the right to correct any error that may be discovered in any invoice that may have been paid to Consultant and to adjust same to meet the requirements of this Agreement. Following approval of an invoice, the City shall endeavor to pay Consultant promptly, but no later than the time period required under the Texas Prompt Payment Act described in Section 7.0 herein. Under no circumstances shall Consultant be entitled to receive interest on payments which are late because of a good faith dispute between Consultant and the City or because of amounts which the City has a right to withhold under this Agreement or state law. The City shall be responsible for any sales, gross receipts or similar taxes applicable to the services, but not for taxes based upon Consultant's net income.

6.0 INSURANCE

Consultant shall meet all City of Round Rock Insurance Requirements set forth at:
https://www.roundrocktexas.gov/wp-content/uploads/2014/12/corr_insurance_07.20112.pdf

7.0 PROMPT PAYMENT POLICY

In accordance with Chapter 2251, V.T.C.A., Texas Government Code, any payment to be made by the City to Consultant will be made within thirty (30) days of the date the City receives goods under this Agreement, the date the performance of the services under this Agreement are completed, or the date the City receives a correct invoice for the goods or services, whichever is later. Consultant may charge interest on an overdue payment at the "rate in effect" on September 1 of the fiscal year in which the payment becomes overdue, in accordance with V.T.C.A., Texas Government Code, Section 2251.025(b). This Prompt Payment Policy does not apply to payments made by the City in the event:

- (a) There is a bona fide dispute between the City and Consultant, a contractor, subcontractor, or supplier about the goods delivered or the service performed that cause the payment to be late; or
- (b) There is a bona fide dispute between Consultant and a subcontractor or between a subcontractor and its supplier about the goods delivered or the service performed that causes the payment to be late; or
- (c) The terms of a federal contract, grant, regulation, or statute prevent the City from making a timely payment with federal funds; or
- (d) The invoice is not mailed to the City in strict accordance with any instruction on the purchase order relating to the payment.

8.0 NON-APPROPRIATION AND FISCAL FUNDING

This Agreement is a commitment of the City's current revenues only. It is understood and agreed that the City shall have the right to terminate this Agreement at the end of any City fiscal

year if the governing body of the City does not appropriate funds sufficient to purchase the services as determined by the City's budget for the fiscal year in question. The City may affect such termination by giving Consultant a written notice of termination at the end of its then-current fiscal year.

9.0 SUPPLEMENTAL AGREEMENT

The terms of this Agreement may be modified by written Supplemental Agreement hereto, duly authorized by City Council or by the City Manager, if the City determines that there has been a significant change in (1) the scope, complexity, or character of the services to be performed; or (2) the duration of the work. Any such Supplemental Agreement must be executed by both parties within the period specified as the term of this Agreement. Consultant shall not perform any work or incur any additional costs prior to the execution, by both parties, of such Supplemental Agreement. Consultant shall make no claim for extra work done or materials furnished unless and until there is full execution of any Supplemental Agreement, and the City shall not be responsible for actions by Consultant nor for any costs incurred by Consultant relating to additional work not directly authorized by Supplemental Agreement.

10.0 TERMINATION; DEFAULT

Termination: It is agreed and understood by Consultant that the City or Consultant may terminate this Agreement for the convenience of the City or Consultant, upon thirty (30) days' written notice to Consultant or City, with the understanding that immediately upon receipt of said notice all work being performed under this Agreement shall cease. Consultant shall invoice the City for work satisfactorily completed and shall be compensated in accordance with the terms hereof for work accomplished prior to the receipt of said notice of termination. Consultant shall not be entitled to any lost or anticipated profits for work terminated under this Agreement. Unless otherwise specified in this Agreement, all data, information, and work product related to this Project shall become the property of the City upon termination of this Agreement, and shall be promptly delivered to the City in a reasonably organized form without restriction on future use. Should the City subsequently contract with a new consultant for continuation of service on the Project, Consultant shall cooperate in providing information.

Termination of this Agreement shall extinguish all rights, duties, and obligations of the terminating party and the terminated party to fulfill contractual obligations. Termination under this section shall not relieve the terminated party of any obligations or liabilities which occurred prior to termination.

Nothing contained in this section shall require the City to pay for any work which it deems unsatisfactory or which is not performed in compliance with the terms of this Agreement.

Default: Either party may terminate this Agreement, in whole or in part, for default if the Party provides the other Party with written notice of such default and the other fails to satisfactorily cure such default within ten (10) business days of receipt of such notice (or a greater time if agreed upon between the Parties).

If default results in termination of this Agreement, then the City shall give consideration to the actual costs incurred by Consultant in performing the work to the date of default. The cost of the work that is useable to the City, the cost to the City of employing another firm to complete the useable work, and other factors will affect the value to the City of the work performed at the time of default. Neither party shall be entitled to any lost or anticipated profits for work terminated for default hereunder.

The termination of this Agreement for default shall extinguish all rights, duties, and obligations of the terminating Party and the terminated Party to fulfill contractual obligations. Termination under this section shall not relieve the terminated party of any obligations or liabilities which occurred prior to termination.

Nothing contained in this section shall require the City to pay for any work which it deems unsatisfactory, or which is not performed in compliance with the terms of this Agreement.

11.0 NON-SOLICITATION

Except as may be otherwise agreed in writing, during the term of this Agreement and for twelve (12) months thereafter, neither the City nor Consultant shall offer employment to or shall employ any person employed then or within the preceding twelve (12) months by the other or any affiliate of the other if such person was involved, directly or indirectly, in the performance of this Agreement. This provision shall not prohibit the hiring of any person who was solicited solely through a newspaper advertisement or other general solicitation.

12.0 INDEPENDENT CONTRACTOR STATUS

Consultant is an independent contractor, and is not the City's employee. Consultant's employees or subcontractors are not the City's employees. This Agreement does not create a partnership, employer-employee, or joint venture relationship. No party has authority to enter into contracts as agent for the other party. Consultant and the City agree to the following rights consistent with an independent contractor relationship:

- (1) Consultant has the right to perform services for others during the term hereof.
- (2) Consultant has the sole right to control and direct the means, manner and method by which it performs its services required by this Agreement.
- (3) Consultant has the right to hire assistants as subcontractors, or to use employees to provide the services required by this Agreement.
- (4) Consultant or its employees or subcontractors shall perform services required hereunder, and the City shall not hire, supervise, or pay assistants to help Consultant.

- (5) Neither Consultant nor its employees or subcontractors shall receive training from the City in skills necessary to perform services required by this Agreement.
- (6) City shall not require Consultant or its employees or subcontractors to devote full time to performing the services required by this Agreement.
- (7) Neither Consultant nor its employees or subcontractors are eligible to participate in any employee pension, health, vacation pay, sick pay, or other fringe benefit plan of the City.

13.0 CONFIDENTIALITY; MATERIALS OWNERSHIP

Any and all programs, data, or other materials furnished by the City for use by Consultant in connection with services to be performed under this Agreement, and any and all data and information gathered by Consultant, shall be held in confidence by Consultant as set forth hereunder. Each party agrees to take reasonable measures to preserve the confidentiality of any proprietary or confidential information relative to this Agreement, and to not make any use thereof other than for the performance of this Agreement, provided that no claim may be made for any failure to protect information that occurs more than three (3) years after the end of this Agreement.

The parties recognize and understand that the City is subject to the Texas Public Information Act and its duties run in accordance therewith.

All data relating specifically to the City's business and any other information which reasonably should be understood to be confidential to City is confidential information of City. Consultant's proprietary software, tools, methodologies, techniques, ideas, discoveries, inventions, know-how, and any other information which reasonably should be understood to be confidential to Consultant is confidential information of Consultant. The City's confidential information and Consultant's confidential information is collectively referred to as "Confidential Information." Each party shall use Confidential Information of the other party only in furtherance of the purposes of this Agreement and shall not disclose such Confidential Information to any third party without the other party's prior written consent, which consent shall not be unreasonably withheld. Each party agrees to take reasonable measures to protect the confidentiality of the other party's Confidential Information and to advise their employees of the confidential nature of the Confidential Information and of the prohibitions herein.

Notwithstanding anything to the contrary contained herein, neither party shall be obligated to treat as confidential any information disclosed by the other party (the "Disclosing Party") which: (1) is rightfully known to the recipient prior to its disclosure by the Disclosing Party; (2) is released by the Disclosing Party to any other person or entity (including governmental agencies) without restriction; (3) is independently developed by the recipient without any reliance on Confidential Information; or (4) is or later becomes publicly available without violation of this Agreement or may be lawfully obtained by a party from any non-party. Notwithstanding the foregoing, either party will be entitled to disclose Confidential Information

of the other to a third party as may be required by law, statute, rule or regulation, including subpoena or other similar form of process, provided that (without breaching any legal or regulatory requirement) the party to whom the request is made provides the other with prompt written notice and allows the other party to seek a restraining order or other appropriate relief. Subject to Consultant's confidentiality obligations under this Agreement, nothing herein shall preclude or limit Consultant from providing similar services for other clients.

Notwithstanding the foregoing, either party will be entitled to disclose Confidential Information of the other to a third party as may be required by law, statute, rule or regulation, including subpoena or other similar form of process, provided that (without breaching any legal or regulatory requirement) the party to whom the request is made provides the other with prompt written notice and allows the other party to seek a restraining order or other appropriate relief. Subject to Consultant's confidentiality obligations under this Agreement, nothing herein shall preclude or limit Consultant from providing similar services for other clients.

Neither the City nor Consultant will be liable to the other for inadvertent or accidental disclosure of Confidential Information if the disclosure occurs notwithstanding the party's exercise of the same level of protection and care that such party customarily uses in safeguarding its own proprietary and confidential information.

Notwithstanding anything to the contrary in this Agreement, the City will own as its sole property all written materials created, developed, gathered, or originally prepared expressly for the City and delivered to the City under the terms of this Agreement (the "Deliverables"); and Consultant shall own any general skills, know-how, expertise, ideas, concepts, methods, techniques, processes, software, or other similar information which may have been discovered, created, developed or derived by Consultant either prior to or as a result of its provision of services under this Agreement (other than Deliverables). Consultant shall have the right to retain copies of the Deliverables and other items for its archives. Consultant's working papers and Consultant's Confidential Information (as described herein) shall belong exclusively to the Consultant. "Working papers" shall mean those documents prepared by Consultant during the course of performing the Project including, without limitation, schedules, analyses, transcriptions, memos, designed and developed data visualization dashboards and working notes that serve as the basis for or to substantiate the Project. In addition, Consultant shall retain sole and exclusive ownership of its know-how, concepts, techniques, methodologies, ideas, templates, dashboards, code and tools discovered, created or developed by Consultant during the performance of the Project that are of general application and that are not based on City's Confidential Information hereunder (collectively, "Consultant's Building Blocks"). To the extent any Deliverables incorporate Consultant's Building Blocks, Consultant gives City a non-exclusive, non-transferable, royalty-free right to use such Building Blocks solely in connection with the deliverables. Subject to the confidentiality restrictions mentioned above, Consultant may use the deliverables and the Building Blocks for any purpose. Except to the extent required by law or court order, City will not otherwise use, or sublicense or grant any other party any rights to use, copy or otherwise exploit or create derivative works from Consultant's Building Blocks.

City shall have a non-exclusive, non-transferable license to use Consultant's Confidential Information for City's own internal use and only for the purposes for which they are delivered to the extent that they form part of the Deliverables.

14.0 WARRANTIES

Consultant represents that all services performed hereunder shall be performed consistent with generally prevailing professional or industrial standards, and shall be performed in a professional and workmanlike manner. Consultant shall re-perform any work not in compliance with this representation.

15.0 LIMITATION OF LIABILITY

Should any of Consultant's services not conform to the requirements of the City or of this Agreement, then and in that event the City shall give written notification to Consultant; thereafter, (a) Consultant shall either promptly re-perform such services to the City's satisfaction at no additional charge, or (b) if such deficient services cannot be cured within the cure period set forth herein, then this Agreement may be terminated for default.

In no event will Consultant be liable for any loss, damage, cost or expense attributable to negligence, willful misconduct or misrepresentations by the City, its directors, employees or agents.

Neither party's liability, in contract, tort (including negligence) or any other legal or equitable theory, (a) shall exceed the professional fees paid or due to Consultant pursuant to this Agreement or (b) include any indirect, incidental, special, punitive or consequential damages, even if such party has been advised of the possibility of such damages. Such excluded damages include, without limitation, loss of data, loss of profits and loss of savings of revenue.

16.0 INDEMNIFICATION

Consultant shall save and hold harmless City and its officers and employees from all claims and liabilities due to activities of his/her/itself and his/her/its agents or employees, performed under this Agreement, which are caused by or which result from the negligent error, omission, or negligent act of Consultant or of any person employed by Consultant or under Consultant's direction or control.

Consultant shall also save and hold City harmless from any and all expenses, including but not limited to reasonable attorneys' fees which may be incurred by City in litigation or otherwise defending claims or liabilities which may be imposed on City as a result of such negligent activities by Consultant, its agents, or employees.

17.0 ASSIGNMENT AND DELEGATION

The parties each hereby bind themselves, their successors, assigns and legal representatives to each other with respect to the terms of this Agreement. Neither party may

assign any rights or delegate any duties under this Agreement without the other party's prior written approval, which approval shall not be unreasonably withheld.

18.0 LOCAL, STATE AND FEDERAL TAXES

Consultant shall pay all income taxes, and FICA (Social Security and Medicare taxes) incurred while performing services under this Agreement. The City will not do the following:

- (1) Withhold FICA from Consultant's payments or make FICA payments on its behalf;
- (2) Make state and/or federal unemployment compensation contributions on Consultant's behalf; or
- (3) Withhold state or federal income tax from any of Consultant's payments.

If requested, the City shall provide Consultant with a certificate from the Texas State Comptroller indicating that the City is a non-profit corporation and not subject to State of Texas Sales and Use Tax.

19.0 COMPLIANCE WITH LAWS, CHARTER AND ORDINANCES

A. Consultant, its consultants, agents, employees and subcontractors shall use best efforts to comply with all applicable federal and state laws, the Charter and Ordinances of the City of Round Rock, as amended, and with all applicable rules and regulations promulgated by local, state and national boards, bureaus and agencies. Consultant shall further obtain all permits, licenses, trademarks, or copyrights required in the performance of the services contracted for herein, and same shall belong solely to the City at the expiration of the term of this Agreement.

B. In accordance with Chapter 2270, Texas Government Code, a governmental entity may not enter into a contract with a company for goods and services unless the contract contains written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of a contract. The signatory executing this Agreement on behalf of Consultant verifies Consultant does not boycott Israel and will not boycott Israel during the term of this Agreement.

20.0 FINANCIAL INTEREST PROHIBITED

Consultant covenants and represents that Consultant, its officers, employees, agents, consultants and subcontractors will have no financial interest, direct or indirect, in the purchase or sale of any product, materials or equipment that will be recommended or required hereunder.

21.0 DESIGNATION OF REPRESENTATIVES

The City hereby designates the following representative authorized to act on its behalf with regard to this Agreement:

Heath Douglas
Chief Information Officer
221 East Main Street
Round Rock, TX 78664
(512) 218-5508
hdouglas@roundrocktexas.gov

22.0 NOTICES

All notices and other communications in connection with this Agreement shall be in writing and shall be considered given as follows:

- (1) When delivered personally to recipient's address as stated herein; or
- (2) Three (3) days after being deposited in the United States mail, with postage prepaid to the recipient's address as stated in this Agreement.

Notice to Consultant:

Timmons Group
1001 Boulders Parkway
Suite 300
Richmond, VA 23225

Notice to City:

City Manager, City of Round Rock
221 East Main Street
Round Rock, TX 78664

AND TO:

Stephan L. Sheets, City Attorney
309 East Main Street
Round Rock, TX 78664

Nothing contained in this section shall be construed to restrict the transmission of routine communications between representatives of the City and Consultant.

23.0 APPLICABLE LAW; ENFORCEMENT AND VENUE

This Agreement shall be enforceable in Round Rock, Texas, and if legal action is necessary by either party with respect to the enforcement of any or all of the terms or conditions herein, exclusive venue for same shall lie in Williamson County, Texas. This Agreement shall be governed by and construed in accordance with the laws and court decisions of Texas.

24.0 EXCLUSIVE AGREEMENT

The terms and conditions of this Agreement, including exhibits, constitute the entire agreement between the parties and supersede all previous communications, representations, and agreements, either written or oral, with respect to the subject matter hereof. The parties expressly agree that, in the event of any conflict between the terms of this Agreement and any other writing, this Agreement shall prevail. No modifications of this Agreement will be binding on any of the parties unless acknowledged in writing by the duly authorized governing body or representative for each party.

25.0 DISPUTE RESOLUTION

The City and Consultant hereby expressly agree that no claims or disputes between the parties arising out of or relating to this Agreement or a breach thereof shall be decided by any arbitration proceeding, including without limitation, any proceeding under the Federal Arbitration Act (9 USC Section 1-14) or any applicable state arbitration statute.

26.0 SEVERABILITY

The invalidity, illegality, or unenforceability of any provision of this Agreement or the occurrence of any event rendering any portion of provision of this Agreement void shall in no way affect the validity or enforceability of any other portion or provision of this Agreement. Any void provision shall be deemed severed from this Agreement, and the balance of this Agreement shall be construed and enforced as if this Agreement did not contain the particular portion of provision held to be void. The parties further agree to amend this Agreement to replace any stricken provision with a valid provision that comes as close as possible to the intent of the stricken provision. The provisions of this Article shall not prevent this entire Agreement from being void should a provision which is of the essence of this Agreement be determined void.

27.0 STANDARD OF CARE

Consultant represents that it is specially trained, experienced and competent to perform all of the services, responsibilities and duties specified herein and that such services, responsibilities and duties shall be performed, whether by Consultant or designated subconsultants, in a manner acceptable to the City and according to generally accepted business practices.

28.0 GRATUITIES AND BRIBES

City, may by written notice to Consultant, cancel this Agreement without incurring any liability to Consultant if it is determined by City that gratuities or bribes in the form of entertainment, gifts, or otherwise were offered or given by Consultant or its agents or representatives to any City Officer, employee or elected representative with respect to the performance of this Agreement. In addition, Consultant may be subject to penalties stated in Title 8 of the Texas Penal Code.

29.0 RIGHT TO ASSURANCE

Whenever either party to this Agreement, in good faith, has reason to question the other party's intent to perform hereunder, then demand may be made to the other party for written assurance of the intent to perform. In the event that no written assurance is given within the reasonable time specified when demand is made, then and in that event the demanding party may treat such failure an anticipatory repudiation of this Agreement.

30.0 MISCELLANEOUS PROVISIONS

Time is of the Essence. Consultant agrees that time is of the essence and that any failure of Consultant to complete the services for each Phase of this Agreement within the agreed Exhibit "A" may constitute a material breach of the Agreement.

Consultant shall be fully responsible for its delays or for failures to use reasonable efforts in accordance with the terms of this Agreement. Where damage is caused to City due to Consultant's failure to perform in these circumstances, City may withhold, to the extent of such damage, Consultant's payments hereunder without a waiver of any of City's additional legal rights or remedies. City shall render decisions pertaining to Consultant's work promptly to avoid unreasonable delays in the orderly progress of Consultant's work.

Force Majeure. Notwithstanding any other provisions hereof to the contrary, no failure, delay or default in performance of any obligation hereunder shall constitute an event of default or breach of this Agreement, only to the extent that such failure to perform, delay or default arises out of causes beyond control and without the fault or negligence of the party otherwise chargeable with failure, delay or default; including but not limited to acts of God, acts of public enemy, civil war, insurrection, riots, fires, floods, explosion, theft, earthquakes, natural disasters or other casualties, strikes or other labor troubles, which in any way restrict the performance under this Agreement by the parties.

Section Numbers. The section numbers and headings contained herein are provided for convenience only and shall have no substantive effect on construction of this Agreement.

Waiver. No delay or omission by either party in exercising any right or power shall impair such right or power or be construed to be a waiver. A waiver by either party of any of the covenants to be performed by the other or any breach thereof shall not be construed to be a waiver of any succeeding breach or of any other covenant. No waiver of discharge shall be valid unless in writing and signed by an authorized representative of the party against whom such waiver or discharge is sought to be enforced.

Multiple Counterparts. This Agreement may be executed in multiple counterparts, which taken together shall be considered one original. The City agrees to provide Consultant with one fully executed original.

IN WITNESS WHEREOF, the parties have executed this Agreement on the dates hereafter indicated.

City of Round Rock, Texas

By: _____
Printed Name: _____
Title: _____
Date Signed: _____

For City, Attest:

By: _____
Sara L. White, City Clerk

For City, Approved as to Form:

By: _____
Stephan L. Sheets, City Attorney

Timmons Group


By: 
Printed Name: Ronald R. Butcher
Title: Dir Asset Mgmt Services
Date Signed: 02 Jun 2021

EXHIBIT A

YEAR 1

Cityworks PLL Implementation Scope Items (Traditional approach)	Cost
Cityworks PLL Software License	n/a
Implementation Fees	\$ 191,310.00
Data Conversion	\$ 38,500.00
System Integrations	\$ 55,410.00
Hardware (Hosting provided by Timmons Group via AWS, annual fee)	n/a
Training	\$ 21,640.00
On-site Go Live support	\$ 4,760.00
Ad-Hoc support (40 hours after Go-Live)	\$ 6,400.00
Expenses/Travel Costs	\$ 19,740.00
Total	\$ 337,490.00

Optional TG developed PLL Enhancement tools	Cost
Data Pusher	\$ 4,000.00
People Pusher	\$ 2,500.00
Parent/Child Relationship	\$ 10,800.00
Total	\$ 17,300.00

Timmons Group PLL Portal Scope Items	Cost
Software cost (initial cost, annual fee is \$12,000)	\$ 35,000.00
Implementation	\$ 5,000.00
Total	\$ 40,000.00

YEAR 2:

Annual re-occurring costs	Cost
TG PLL Portal annual license cost (support, upgrades, etc.)	\$ 12,000.00
Total	\$ 12,000.00

YEAR 3:

Annual re-occurring costs	Cost
TG PLL Portal annual license cost (support, upgrades, etc.)	\$ 12,000.00
Total	\$ 12,000.00

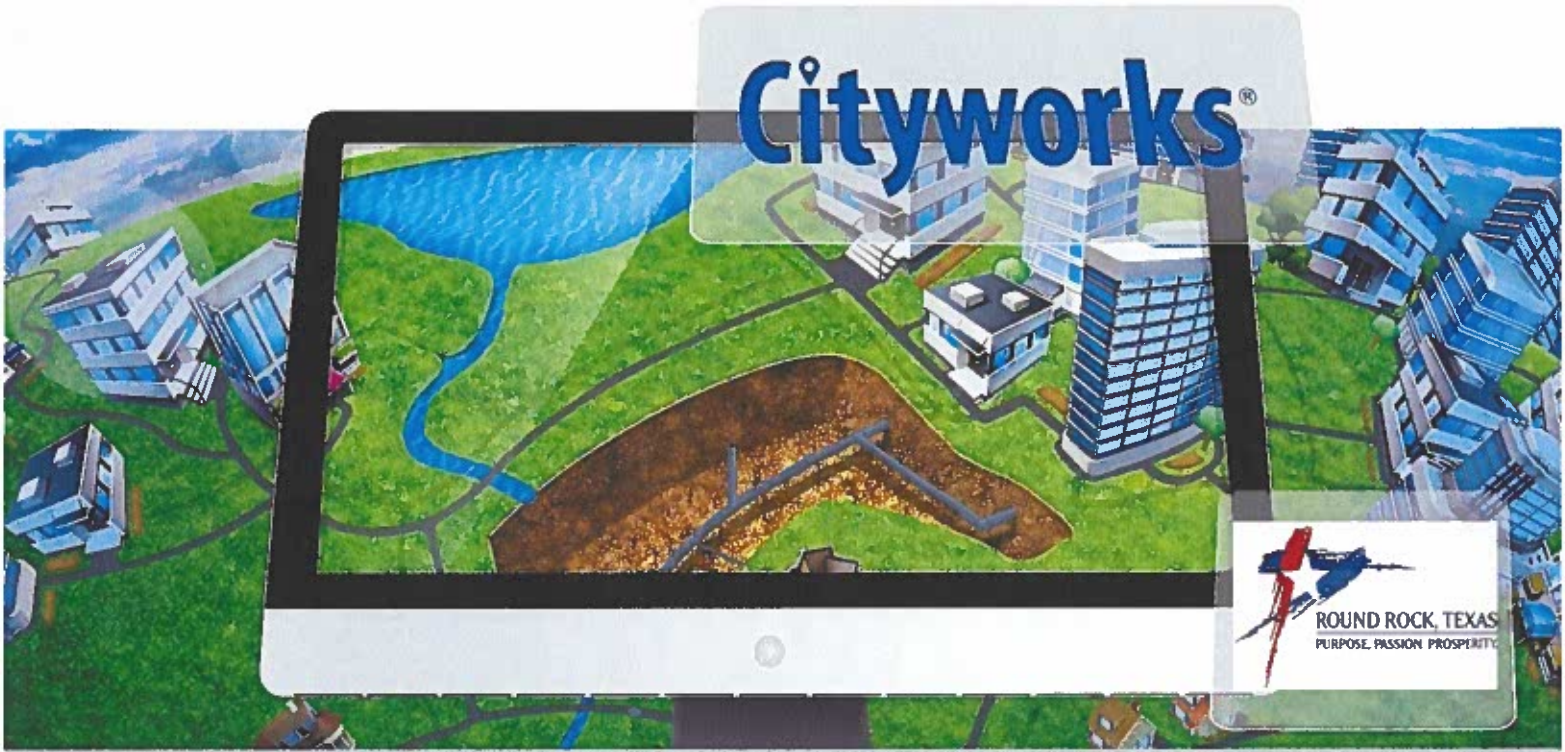
TOTAL \$418,790.00



Software and Implementation Services for Community Development System

Round Rock, TX

April 6, 2021



Contact: Lou Garcia | Project Director

1001 Boulders Parkway, Suite 300, Richmond, VA 23225

443.904.3897 | louis.garcia@timmons.com

www.timmonsgis.com



1001 Boulders Parkway
Suite 300
Richmond, VA 23225

P 804.200.6500
F 804.560.1016
www.timmonsgis.com

April 6, 2021

Nathan Smith
Geospatial Services Manager
City of Round Rock
221 E Main St.
Round Rock, TX 78664

RE: Cityworks PLL Implementation

Dear Nathan:

Timmons Group is pleased to submit our proposal to the City of Round Rock (Round Rock) for the Software & Implementation Community Development System software project. For over 20 years, Timmons Group has provided a wide variety of Computerized Permitting and Licensing software as well as Computerized Maintenance Management Software (CMMS), Enterprise Asset Management, IT, and award winning GIS services to local government, utilities, municipal, federal, and private clients. Our team encompasses Cityworks, the leading GIS-Centric Permit, Licensing and Land (PLL) System on the market, which allows for extensive combined capabilities, software tools, local support and depth of experience required to form a solid foundation for the success of this project.

We believe that implementing **Cityworks® Server PLL** for your permitting and development management system needs will meet each of your requirements both now and with any future expansion. We have included an in-depth description of our approach, which has led to successful implementations across the United States. Additionally, **Timmons Group is unique as it is one of only two Cityworks solution providers that is both a Platinum Implementation Partner and a Strategic Development Partner.**

Timmons Group brings a rich pool of people, knowledge, and expertise to this project through multiple years of experience in implementing permitting, business licensing, development processes, and code enforcement solutions. In an iterative and collaborative process, Timmons Group will build a roadmap, engage experienced professionals, and execute a well-planned approach for your implementation of Cityworks PLL, integration to other systems and assist you with conversion from your legacy system. Be assured that the team leaders and staff identified for this project have successfully completed projects of similar size and scope for a variety of public and private clients throughout the country. Michael Edwards is our proposed Project Manager. He has led multiple Cityworks implementations and integration projects, including working with cities, counties, and public utility districts across the U.S., including a current existing TrackIT user migrating to Cityworks PLL with our services.

Timmons Group is committed to providing Round Rock with the resources needed to achieve your goals and the priority to complete each task on schedule and within budget. Our dedicated staff will provide you with consistent, responsive service. We have established a strong team, based on similar projects, client success and certification status.

Our team will provide Round Rock with:

- An unsurpassed ability to deliver sound solutions to all phases of your program. Key team members dedicated to your project offer an impressive level of professional experience and knowledge for delivering services to your full range of associated services.
- A full understanding of your program requirements and a project team committed to exceeding your highest expectations through the development of sound and innovative technical solutions. We invite you to review our proposal, while keeping the following points in mind:
 - Timmons Group is a **Cityworks® Platinum Implementation Partner**, with our project team comprised of experienced subject matter experts who have worked together on multiple successful community development, permitting, inspection and licensing projects specific to Cityworks® PLL.



1001 Boulders Parkway
Suite 300
Richmond, VA 23225

P 804.200.6500
F 804.560.1016
www.timmonsgis.com

- o Timmons Group is a Cityworks® Strategic Development partner with intimate experience with all of Cityworks® API's and experience in leveraging them for custom integrations and mobile deployments for iOS, Android, Surface or Windows tablets, or smartphones.
- o A team with institutional knowledge needed to see the project assignments through...all the way through. We will leverage our "lessons learned" on recently completed similar projects to your full advantage. We have integrated Cityworks with numerous other systems ranging from financial, to billing, to mobile technologies.
- o Comprehensive training program that will involve Round Rock employees through all phases of the project.
- o A team which prides themselves with delivering innovative solutions that exceeds our clients' expectations. Each team member is empowered to do what it takes to make sure your projects are successful endeavors for you and your stakeholders.

A partnership with Timmons Group offers Round Rock a significant number of benefits. From initial system planning and design activities all the way through implementation and deployment, you will have direct access to industry-leading engineering, planning, GIS, and information technology professionals, and "best-of-breed" Permitting, Licensing and CMMS enterprise asset management services. We distinguish ourselves through our training program that starts at project kickoff and doesn't end until well past project completion.

Timmons Group greatly appreciates this opportunity to present our submittal and we are confident that our team represents the best overall value to the Round Rock. If you have any questions or require any additional information, please feel free to contact Lou Garcia, our Principal contact person, at 443.904.3897.

Sincerely,

Louis Garcia
Principal & Project Director

Ron Butcher, Jr., MBA
Principal in Charge



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EXECUTIVE SUMMARY

Many community development, permitting, licensing, etc. solutions are capable of performing development services tasks as well as extensive data analysis. However, this does not indicate nor is it true that simply by utilizing and analyzing data and/or a software system that development services is operating and delivering services as they desire to. To improve operational capabilities and provide desired services a Best Management Practice (BMP) framework, Workflow and Standard Operating Procedures (SOPs) that fully leverage and utilize Cityworks PLL must be undertaken. In order to understand where development services need to get to, we must first define this destination. When Timmons Group works with our clients to address their community development needs, we frequently reference the U.S. Department of Housing and Urban Development definition that states:

“Community development activities build stronger and more resilient communities through an ongoing process of identifying and addressing needs, assets, and priority investments. Community development activities may support infrastructure, economic development projects, installation of public facilities, community centers, housing rehabilitation, public services, clearance/acquisition, microenterprise assistance, code enforcement, homeowner assistance and many other identified needs.” - as defined by U.S. Department of Housing & Urban Development

When reviewing this definition, several technical solutions can meet the management of these areas. In order to meet the intent of the US Dept. of HUD definition as well as Round Rock desired goals, the supporting areas (processes, resources, technology and competences) must be first recognized and understood and then a plan must be enacted to address them and to fold them into an overall plan for a Cityworks PLL implementation.

Timmons Group proposes to work with Round Rock to refine existing TrackIT workflows or create new workflows, following existing business rules, legislation, and other criteria so that Round Rock can leverage Cityworks PLL to meet your goals. It will be our intent to utilize your existing processes/workflows and to “tweak” these processes/workflows as necessary to include best practices, a Best Management Practice framework, Workflow and Standard Operating Procedures, and to fully and effectively utilize the full capabilities of Cityworks PLL. This initial business process analysis provides our implementation team with a detailed look into the everyday processes marshaled by Round Rock staff. A primary objective of this task is for our implementation team to review and understand how Round Rock conducts business and manages its workflows. The ultimate goal is to provide knowledge to support and enable our implementation team to properly address the technological impacts of the software deployment and Round Rock in order to understand the technological impacts and the non-technological impacts related to business processes and workflows.

Realizing your vision, however, can be challenging. It will require change – new behaviors and new skills. It will also require a solid foundation of well-defined business processes and solution requirements. But before any supporting IT tools can be configured, there must be clarity on the organization’s core processes: the workflows for key steps and sub-steps, and what data must be collected at which points to inform which decisions; as well as which integrations to other Round Rock systems are desired. By analyzing business processes in a structured way, one streamlines the technology and data needs and, perhaps more importantly, one can identify tangible improvement areas for quick wins.



As we have detailed in other sections, engaging Timmons Group to address your permitting and community development needs will yield the results you demand. We have performed several projects whereby we have migrated localities from competing software solutions, such as TrackIT, to Cityworks PLL. Many years of important lessons learned will be available to you and your stakeholders throughout the life of your program. Regarding group specific consulting, Timmons Group brings not only geospatial and information technology professionals to assist with the implementation of the Cityworks Server PLL solution, but also subject matter experts in the fields of permitting, inspections, licensing, utilities, and planning. You will have the opportunity to work with our community development, planning, inspection, geospatial, and technology subject matter experts who will share over a century of combined ideas and solutions with you in support of your greater mission. These resources will be available to the project team to assist with best practices as Cityworks PLL is configured uniquely to each Functional Group and Cityworks PLL is configured around each Functional Groups business processes and workflows. These subject matter experts will review the proposed configuration workflows for



Software and Implementation Services for Community Development System City of Round Rock, TX

best practices and address the “do they make sense” questions, prior to Timmons Group submitting the proposed work flows for Round Rock approval.

Many years of important lessons learned will be available to you and your stakeholders throughout the life of your program. Regarding group specific consulting, Timmons Group brings not only geospatial and information technology professionals to assist with the implementation of the Cityworks Server PLL solution, but also subject matter experts in the fields of permitting, inspections, licensing, utilities, and planning as well as Code Enforcement. You will have the opportunity to work with our community development, planning, inspection, geospatial, and technology subject matter experts who will share over a century of combined ideas and solutions with you in support of your greater mission. These resources will be available to the project team to assist with best practices as Cityworks PLL is configured uniquely to each Functional Group and Cityworks PLL is configured around each Functional Groups business processes and workflows. These subject matter experts will review the proposed configuration workflows for best practices and address the “do they make sense” questions, prior to Timmons Group submitting the proposed workflows for Round Rock approval.

Round Rock, no doubt, faces a critical turning point under the pressure of an increasing demanding citizen population for electronic systems, aging infrastructure, deprived maintenance routines, and financial pressures. Citizens are used to using smart phones to receive services from entities such as Amazon, Facebook, etc...they expect the same from their local governments now. Staff must manage its resources, collect and analyze information, and provide long-term value to the public as well as to municipal decision makers. Under this project you have the opportunity to leverage data and technology in new ways and to leverage processes and analytic techniques. Beyond the immediate process efficiency gains, your permitting and development management program can help affect real cultural change within the organization and the City of Round Rock itself. Truly, you have an exciting opportunity.

Timmons Group represents the best overall value to the City of Round Rock for your Cityworks PLL migration project. We cite the following reasons:

- 1) We have the resources necessary to provide a dedicated team to Round Rock.
- 2) Our team has implemented Cityworks PLL with over 25 municipalities across North America. Lessons learned, as well as well as a proven project implementation approach are already established and will greatly benefit Round Rock.
- 3) We are a platinum level business partner with Cityworks and have been a business partner with Cityworks for nearly 17 years.
- 4) We are also a development partner with Cityworks, meaning we develop solutions that extend the Cityworks platform for increased capabilities and efficiencies.
- 5) The Timmons Group PLL Portal is recognized as one of, if not, the leading portal on the market for citizen interaction in regard to permitting, licensing and inspections. This portal is built upon the Cityworks PLL API's and as such, greatly extends the capabilities of Cityworks PLL.
- 6) We have a well-honed methodology for data conversion. One that looks at each legacy data element individually and we work with our clients to ensure these data elements are moved into the correct location in your new solution. This includes a methodology for working with those data sets around cases that are underway and active during this migration. These processes are automated and thus we can run them multiple times until the conversion is correct.
- 7) We have also developed other tools that greatly assist Timmons Group PLL implementation clients and extend and enhance the capabilities of Cityworks PLL.
- 8) As optional services/products to be pursued in the future we offer the Timmons Group PLL Portal, which integrates out of the box with Cityworks PLL.
- 9) We believe in an iterative implementation methodology that will expose Round Rock stakeholders to PLL early and often. This approach allows them to help develop processes reflective in PLL thus providing a sense of ownership and pride in the finished product.
- 10) We desire to develop a role-based training plan with Round Rock that will leave end users completely self-sustaining.
- 11) We view these projects as a start to long term mutually beneficial relationships and not simple one of solution deliveries.

TIMMONS GROUP

PROPOSAL CONTACT

Lou Garcia, Principal, PMP
Project Director
1001 Boulders Parkway, Suite 300
Richmond, VA 23225
☎ 443.904.3897
✉ louis.garcia@timmons.com

OUR MISSION

To achieve unparalleled understanding of our clients, their businesses and their visions resulting in unrivaled customer service and shared success.



16 OFFICES NATIONWIDE:

- Virginia (8)
- Maryland
- North Carolina (4)
- Texas
- Washington, DC
- Arizona

8 FIELD OFFICES

- Portland, OR
- Cedar Rapids, IA
- Golden, CO
- Jefferson City, MO
- Carson City, NV
- Atlanta, GA
- Parkton, MD
- Jonesborough, TN

100+

DEDICATED
GEOSPATIAL
STAFF

WHO WE ARE

Timmons Group is a well-established professional consulting firm (C-Corporation) with over 700 employees, providing information technology and geospatial consulting services to public and private clients throughout the U.S. and Canada since 1953. Our team develops across multiple technologies and platforms including open-source, proprietary, and hybrid solutions. From our web developers to our database managers, systems engineers, consultants and project managers, **our award-winning team provides the unique ability to understand your vision and offer a solution tailored to your mission-critical business requirements.** We pride ourselves in being technology experts that care deeply about community development and asset management solutions to help you better manage your citizen needs, concerns and your assets. Our Technology group has the experience and capability to provide a wide range of services. In business since 1953, Timmons Group has sustained growth over the past several years in gross revenues and workload. Current annual gross receipts over \$100 million. This stable environment sets the stage for Timmons Group's continuing operations for the foreseeable future as a financially viable corporate entity.

PLANNING

- Requirements Definition
- Strategic Planning
- Implementation Planning

DESIGN

- Infrastructure Design
- Database Design
- Data Model Design
- Application Design
- GIS Infrastructure Design

DEVELOPMENT

- Application Development
- Data Conversion
- Field Data Collection
- Mobile & Web Development
- System Integration

IMPLEMENTATION

- Cityworks AMS & PLL
- User & Admin Training
- Support



Timmons Group – Cityworks Implementation Partner

Timmons Group is a multi-disciplined engineering and technology firm recognized for nearly twenty years as one of Engineering News Record's (ENR) Top 500 Design Firms in the country. We provide community development, asset management, civil engineering, environmental, geotechnical, GIS/geospatial technology, landscape architecture, and surveying services to a diverse client base. Founded in 1953, we are a well-established firm with a pioneering spirit. Decades of experience allow us to lead our industry with an unwavering commitment to forward thinking, innovative design and complete solutions that help our clients to be successful. Inspired by your vision, our client service teams solve your challenges in imaginative, cost-effective and constructible ways. As a 700 person professional services consulting firm with nearly 2,000 clients, our extensive experience in technology, engineering, planning, and surveying enables us to design and implement innovative solutions to solve our clients' varied challenges.



As Timmons Group celebrates our next sixty years, we are extremely proud of the legacy we have established in solving the many challenges our clients have entrusted to us. However, we are not resting on our many accomplishments of the past; but rather, we are focusing on building our culture as community leaders and responsible corporate citizens, focused on understanding your specific challenges and helping you to realize your vision.

Timmons Group, which has established itself as one of the most sought after EAM & Community Development consulting groups in the United States, is excited about working side-by-side with you and your staff to develop a technological legacy that you, your organization, and all of your stakeholders will take pride in. Our unique view of your project is one of the distinguishing traits that sets Timmons Group apart from other Cityworks asset management consultants. We do not view these projects as simply a software installation and configuration job. Rather, we view Cityworks as an integral piece of your over-riding enterprise Community Development & CMMS/asset management strategies and the foundation upon which countless additional work tasks will rely upon for the feature-rich content needed to support your organization's varied daily operational, regulatory, and customer service challenges. We look forward to sharing our ideas and solutions for this project.

Our History

<p>67 <i>Years in business</i></p>		<p>100+ <i>Dedicated Asset Management & Geospatial staff</i></p>
<p>105+ <i>Cityworks Implementations</i></p>		<p>700+ <i>Total Staff</i></p>
<p>Where We Are</p> <p>16 <i>Nationwide offices</i></p>	<ul style="list-style-type: none"> • Richmond, VA (3 offices) • Charlotte, NC • Raleigh, NC • Greensboro, NC • Elizabeth City, NC • Baltimore, MD 	<ul style="list-style-type: none"> • Ashburn, VA • Round Rock, VA • Hampton Roads, VA • Staunton, VA • Dallas, TX • Phoenix, AZ • Washington, DC

Michael Edwards, PMP, will be our project manager for this project. Michael has a long history of implementing permitting, licensing, inspection & code enforcement solutions, specifically as it relates to Cityworks PLL.

Timmons Group has implemented Cityworks for over 105 different clients throughout the United States and Canada. Most of these projects involve legacy data migration, customer support services, and software integration. The map on the following page represents this experience.



Software and Implementation Services for Community Development System City of Round Rock, TX

Timmons Group has been a Cityworks Business Partner for 17+ years. The symbiotic relationship enjoyed between Cityworks and Timmons Group is a unique and tremendously advantageous team to our clients. While Cityworks is a software company, Timmons Group is a company focused on professional services and excellent project delivery. This, unique in the industry, teaming arrangement allows Cityworks to concentrate upon the constant development and improvement of their product offerings while Timmons Group concentrates on the successful implementation, real world use and exploitation of the Cityworks products. We view our mutual clients from somewhat different perspectives, however this is to your advantage. Timmons Group is free to ensure that the Cityworks products are implemented so that they work utilizing the workflows, business rules and processes our mutual clients desire, including integration to other software systems. Timmons Group will ensure that Cityworks works for you and is not a system that Round Rock must dedicate tremendous (and unnecessary) resources to. We are free to concentrate on the exacting requirements our clients require. We therefore look at the operational side of our client's requirements and the strategic goals they wish to achieve, as well as keeping our clients abreast of the latest trends and standards in best practices of asset management, CMMS and Community Development. Cityworks can concentrate on how their products meet the basics around software: constant development, ensuring the software performs as desired, provides capabilities to meet best practices and standards and stays abreast of the latest technology developments, as well as the look and feel end users demand. Cityworks is also able to ensure their future product offerings are aligned with long term strategic goals of not only Esri GIS, but also their clients wishes and desires. All of this is made possible by offering to you, our clients, a true team of experts. Although your primary contact with the team will be with Timmons Group during the implementation, Cityworks will take an active role in the project. Our teams work together to develop our proposal responses, Cityworks Client Success Managers are involved in our scope development and will be involved with the project team (comprised of Round Rock, Timmons Group and Cityworks) from the start, including attendance at key project meetings. Once Go Live occurs Cityworks involvement will become more prominent. However, rest assured, both Cityworks and Timmons Group will remain involved and attentive to you as our mutual clients well past the Go Live stages. We share the common value that our success is truly achieved only when our clients are successful. Both Timmons Group and Cityworks take this seriously and feel that this unique relationship only makes our two companies stronger and our clients more satisfied.

As evidenced on the map below, Timmons Group has provided Cityworks implementation services to over 90 clients throughout North America.





Software and Implementation Services for Community Development System City of Round Rock, TX



- | | | | |
|-----------------------------------|--|--|--|
| 1 Garland, TX | 26 Carpinteria Valley Water District, CA | 51 American States Utility Service | 76 Edmond, OK |
| 2 Otay Water District, CA | 27 Shafter, CA | 52 Asheville, NC | 77 Lake Stevens, WA |
| 3 Alpharetta, GA | 28 Alcoa, TN | 53 Brookhaven, GA | 78 Elk Grove, CA |
| 4 Naperville, IL | 29 Goochland County, VA | 54 Frederick Water, VA | 79 Yakima, WA |
| 5 Fayetteville, NC | 30 Petersburg, VA | 55 Montgomery County, MD | 80 Douglasville/Douglass County, GA |
| 6 Hamilton County, TN | 31 Henderson, KY | 56 Manatee County, FL | 81 Salem, VA |
| 7 Skagit County PUD #1, WA | 32 SeaTac, WA | 57 Florida Keys Aqueduct Authority, FL | 82 North Gila County Sanitation District, AZ |
| 8 Auburn, AL | 33 Sammamish, WA | 58 St Johns County, FL | 83 Tampa, FL |
| 9 Lafayette Consolidated Govt, LA | 34 Weston, FL | 59 Madison, WI | 84 Baltimore County, MD |
| 10 Herndon, VA | 35 Seattle, WA | 60 Bonney Lake, WA | 85 Nashville, TN |
| 11 Richmond, VA | 36 Grand Rapids, MN | 61 Renton, WA | 86 Pennichuck Water, NH |
| 12 Alexandria, VA | 37 Upper St. Clair, PA | 62 Forsyth County, GA | 87 Consumes CSD |
| 13 Jackson, MS | 38 Tallahassee, FL | 63 Yelm, WA | 88 Albemarle County Service Authority, VA |
| 14 Washington DOT, DC | 39 Sugarland, TX | 64 Tigard, OR | 89 Holly Springs, NC |
| 15 Colonie, NY | 40 Bartow County, GA | 65 Napa Sanitation District, CA | 90 Isle of Wight County, VA |
| 16 Newport News, VA | 41 North Miami Beach, FL | 66 Regional Municipality of York, Canada | 91 O'Fallon, IL |
| 17 Montgomery County, OH | 42 Grey Forest Utilities, TX | 67 Escondido, CA | 92 Toledo, OH |
| 18 Waterford Charter Township, MI | 43 Herriman, UT | 68 Spotsylvania County, VA | 93 Charlotte County, FL |
| 19 Altoona City Authority, PA | 44 Milwaukie, OR | 69 Independence, MO | 94 Minot, ND |
| 20 Raleigh, NC | 45 Harrisonburg, VA | 70 Bellingham, WA | |
| 21 Allegheny County, PA | 46 Lebanon, OH | 71 Charleston Water, SC | |
| 22 Chicago, IL | 47 MetroConnects, SC | 72 Fairfax County, VA | |
| 23 City of Winston-Salem, NC | 48 Las Gallinas Valley Sanitary District, CA | 73 West Valley City, UT | |
| 24 Watsonville, CA | 49 Macon Water, GA | 74 Charlotte Water, NC | |
| 25 Morro Bay, CA | 50 Mid Peninsula Regional Open Space, CA | 75 Sammamish Plateau Water District, WA | |

REFERENCES

Our past experience has taught us that the best measure of our organizational capability is due to our extensive list of repeat clients. We believe that this indicates client satisfaction relative to our performance. Below is a list of clients where Timmons Group has successfully provided similar services for, in various states and localities. We have also listed the client contact so that they can attest to the quality of our work, timeliness, diligence, and our ability to meet budget and schedule. We encourage you to call and inquire how they would rate our management skills, technical competence, commitment to service and project delivery.

 <p>GARLAND TEXAS MADE HERE</p>	<p>Cityworks® Enterprise Asset Management System Implementation City of Garland, TX Contact: Cynthia Baughman Tel. 972.205.3237 CBaughman@garlandtx.gov Address: 2343 Forest Lane, Garland, TX 75042 Project Dates: December 2015 – March 2017</p> <p>The City of Garland, TX has contracted with Timmons Group to implement Azteca's Cityworks Server AMS software for the City's Water Utilities department. The City is currently using multiple systems to manage their water utilities assets. As part of this implementation, Timmons Group is integrating the Cityworks Server AMS software with the City's existing financial system (Harris Cayenta), Interactive Voice Response (IVR) system, Highland OnBase document management system, and the City's existing Esri ArcGIS database. By integrating all of these systems the City will be able to reduce their cost of operations by reducing multi-entry processes, improved customer service, and enhanced business intelligence through reporting.</p> <p>Timmons Group's implementation of the Cityworks Server AMS software along with integrations to the City's other supporting systems will provide an enhanced centralized solution, streamlining and improving service request routing, work order processing, and asset analysis. This centralized solution will improve ease of use, reduce the cost of maintenance, and unify work order management processes across all departments.</p>
 <p>City of Auburn</p>	<p>Cityworks® Enterprise AMS & PLL Implementation City of Auburn, AL Contact: Christopher Graff 334.501.7207 cgraff@auburnalabama.org Address: 144 Tichenor Ave, Auburn AL 36830 Project Dates: Implementation completed in 2012; Maintenance is ongoing</p> <p>Project Description: The City of Auburn, AL contracted with Timmons Group for implementation of an Enterprise Asset Management System (EAMS) for their water distribution division. Through extensive evaluation the City chose Azteca Cityworks as their asset management platform.</p> <p>Timmons Group implemented the Cityworks Server technology to streamline and improve the way the City handles service request routing, tracking and management and for improving the work order management process.</p> <p>Timmons Group and the City's staff took part in a business process analysis and business improvements phase of the project that resulted in a clearly defined Cityworks configuration and a formal set of standard operating procedures. This process also produced an implementation approach that can be easily replicated by other departments as the City moves forward.</p> <p>As part of this implementation Timmons Group integrated Cityworks with the City of Auburn's existing Utility Billing System (Tyler Technologies Eden). By integrating Cityworks with the existing Utility Billing System the City has been able to leverage all of the functionality of Cityworks while maintaining their current utility billing business process.</p> <p>In addition, Timmons Group implemented Cityworks PLL and the Timmons Group PLL Portal. Please see the letter of reference following this section.</p>



Software and Implementation Services for Community Development System City of Round Rock, TX

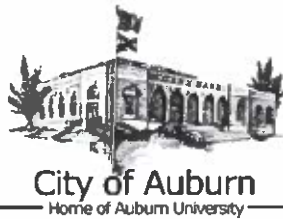
	<p>Cityworks® PLL Implementation & Citizen Engagement System Integration City of Escondido, CA Contact: Rob Van De Hey 760-839-6213 rvandehey@escondido.org Address: 201 North Broadway, Escondido, CA 92025 Project Dates: September 2018 – May 2019</p> <p>Project Description: The City of Escondido contracted Timmons Group to assist with the implementation, configuration, data conversion (from CRW/Superion TRAKIT .NET), and report customization/creation for Cityworks Permits, Licensing and Land (PLL) software; implementation and configuration of the Timmons Group Public Facing Portal for Cityworks PLL; and the implementation and configuration of OnBase for plan review and document management for Cityworks PLL.</p>
	<p>Cityworks® Enterprise AMS & PLL Implementation City of Fayetteville, NC Contact: Joe Vittorelli 910.433.1863 jvittorelli@ci.fay.nc.us Address: 433 Hay Street, Fayetteville, NC 28301 Project Dates: Implementation completed in 2016; Maintenance is ongoing</p> <p>Project Description: The City of Fayetteville, NC contracted with Timmons Group for implementation of an Enterprise Asset Management System (EAMS) and Permitting solution. Through extensive evaluation, the City chose Azteca Cityworks Server AMS (Asset Management System) and Azteca Cityworks Server PLL (Permits, Licensing, and Land) as their asset management and permitting platforms.</p> <p>Timmons Group utilized a phased approach for implementation of both the Cityworks AMS and Cityworks PLL implementations. The first phase of the implementation set the stage for the remainder of the project by addressing IT-related requirements and provided overviews of configuration information that were collected in the subsequent phases.</p> <p>Timmons Group then moved the City into Phase 2 of the implementation, development of the System Design and Configuration Plan (SD&C). Timmons Group and the City's staff took part in multiple business process analysis and business process improvement meetings to review workflow and system integration requirements for each department. The results of those meetings produced a clearly defined Cityworks configuration and a formal set of procedures that were documented in the SD&C plan.</p> <p>The resulting SD&C plan kicked off Phase 3 of the project, Cityworks Configuration. Utilizing the SD&C plan requirements, Timmons Group configured the Cityworks AMS and PLL databases. Timmons Group and the City performed a series of configuration review meetings to develop the final Cityworks configuration and integrations.</p> <p>As part of the final phase of the project, Timmons Group provided the City with a comprehensive five-day on-site Cityworks training session through a hands-on approach for both end users and Cityworks administrators. Timmons Group also provided three days of on-site go-live support to assist the City with any on-the-fly configuration changes.</p> <p>Under this contract, Timmons Group implemented Cityworks Server AMS for the City's environmental services division. This division is responsible for the collection and management of residential and commercial solid waste and recycling programs for the City's 200,000 plus inhabitants. Timmons Group implemented the Cityworks Server technology to streamline and improve the way the City handled service request routing, tracking, and management, and to improve the work order management process. Included in this implementation was integration with the City's public report-a-problem portal, SeeClickFix.</p> <p>Timmons Group implemented Cityworks Server PLL for the City's Permitting, Building Inspections, and Code Enforcement divisions. This implementation allowed the City to streamline the application and review process by enabling each division to share and access pertinent information through a single portal based on a cohesive workflow.</p>



Software and Implementation Services for Community Development System City of Round Rock, TX

	<p>Cityworks® Enterprise PLL Implementation & CitySourced integration City of Brookhaven, GA Contact: Robert Mullis 404.637.0640 Robert.mullis@brookhavenga.gov Address: 1 Independence Hill, Farmingville, NY 11738 Project Dates: Implementation completed in 2017; Maintenance is ongoing</p> <p>Project Description: The City of Brookhaven, Georgia, a City of approximately 50,000 residents, contracted with Timmons Group for an Implementation of Cityworks PLL Software and Meritage Conversion. Project tasks included upgrading the City's existing Cityworks software to implement the Permits, Licensing, and Land (PLL) software module. Along with this implementation, Timmons Group also migrated data for historical permits from the City's current Meritage system to meet business needs 3 years out. Timmons Group is also integrating Cityworks PLL with OnBase's Electronic Plan Review. The Timmons Group Public Facing Portal was also implemented.</p>
	<p>Cityworks® Enterprise PLL Implementation City of Winston-Salem, NC Contact: Lee Nichols, IS Project Coordinator Tel. 336.747.7013 Email: leen@cityofws.org Address: 101 N. Main Street, Winston-Salem, NC 27101 Project Dates: Implementation completed in 2017; Maintenance is ongoing</p> <p>Timmons Group implemented Cityworks PLL (Permitting, Licensing and Land) and a custom Public Portal. The implementation replaced the City's previous system, Hansen 7, as it was becoming outdated, inefficient, and unable to perform vital features the growing community needed.</p> <p>By implementing Cityworks, the City gained direct control over their business processes, which became completely customizable based on specific needs and allowed ease of coordination between several vital City departments. The City also saw improvement in system reporting through the development of custom reports using PL/SQL and SAP Crystal Reports.</p> <p>The need to develop a custom Public Portal grew from the City's desire to include several additional functional requirements that were not standard with Cityworks' portal, such as increased scheduling capabilities, concentrated searching options, as well as easier payment options for their clients. Timmons Group worked alongside the client to ensure all options were included in the new system—and would address all needs appropriately. Using ESRI best practices and our expertise in development, the custom Public Portal was deployed to Savannah's Oracle environment for Cityworks 2014 SP5 and Esri ArcGIS Server 10.2as.</p> <p>With the successful implementation, the City of Savannah now maintains their assets over multiple departments through an integrated system. The new system also allows the City to identify and maintain workflows while giving citizens the access they need to permitting and business licenses.</p>
	<p>Implementation of Cityworks® Permits, Licensing and Land (PLL) St. Johns County, FL Contact: Rocky Agbunag Tel. 904.209.0273 Email: ragbunag@sjcfl.us Address: 500 San Sebastian View, Saint Augustine, FL 32084 Project Dates: Implementation completed in 2018; Maintenance is ongoing</p> <p>Project Description: The County of St. Johns, Florida, contracted with Timmons Group to provide professional services in the implementation of Azteca System's Cityworks Permits, Licensing and Land (PLL) software module and to manage the implementation process for use in the Department of Public Works processes.</p>

LETTERS OF REFERENCE



June 29, 2015

Timmons Group
Ron Butcher
1001 Boulders Parkway
Suite 300
Richmond, Virginia 23225

RE: Cityworks® Enterprise Asset Management System Implementation

Dear Mr. Butcher:

I would like to take this opportunity to express my gratitude and appreciation for Timmons Group's performance on the implementation of our Enterprise Asset Management System over the past several projects (water distribution division, sewer collection division and public works department). We have been extremely pleased with the software provided by Azteca Systems, Inc. (Cityworks) and services provided by Timmons Group.

These tasks required defining our business processes, building integration between enterprise systems and configuring Cityworks to streamline and improve the way the City was currently handling service request routing, tracking and management. This dramatically improved our work order management process, much due to your staff's demonstrated knowledge, expertise, diligence and resourcefulness.

Timmons Group's expert implementation of Cityworks has opened a new future of asset management system capabilities and addresses the City's mission of providing quality, responsible services to its citizens. We are proud of the solutions we have built with Timmons Group and hope to continue leveraging our relationship to further develop solutions to maintain an excellent quality of life in the City of Auburn.

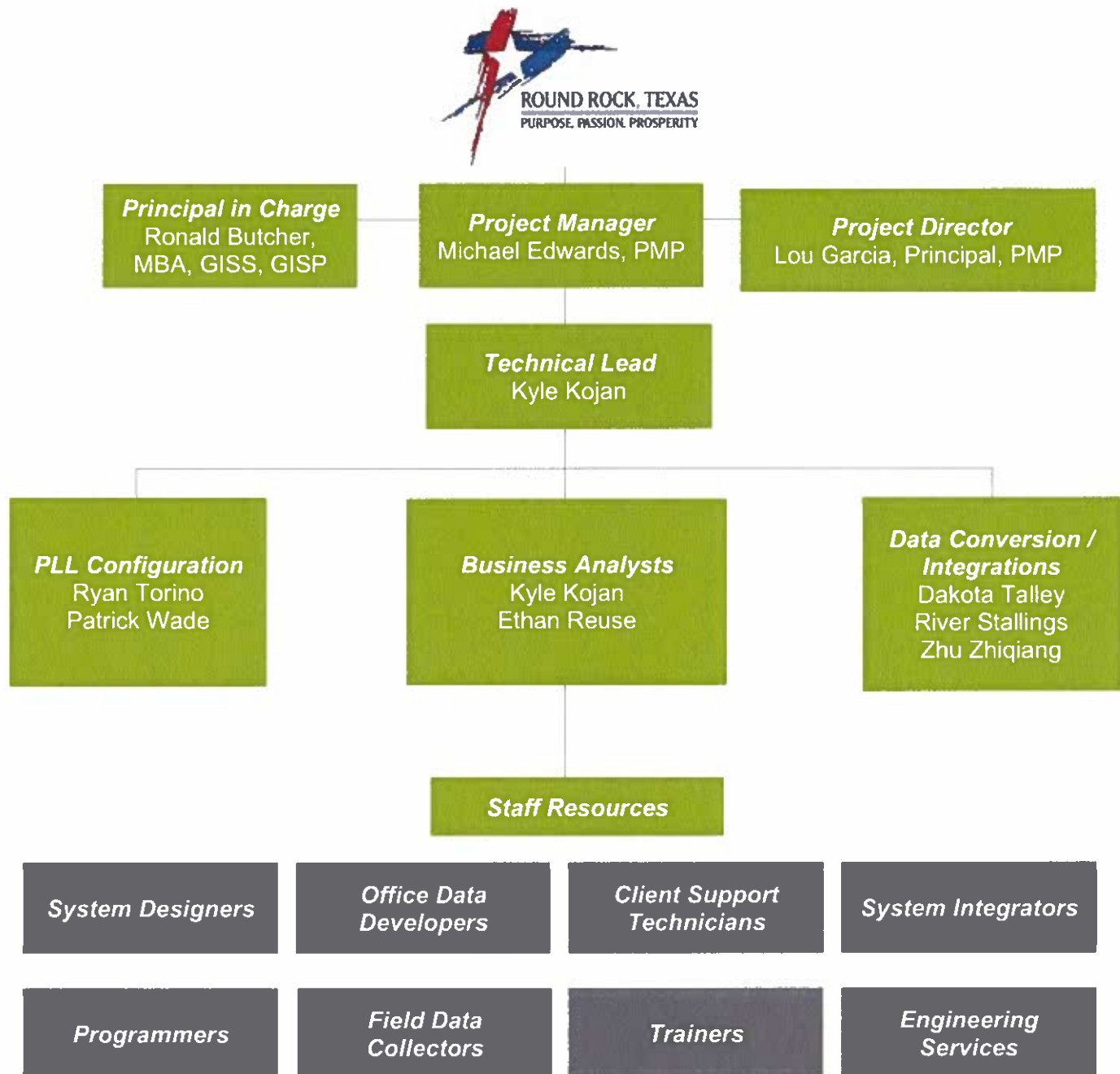
Best regards,



Christopher Graff, GISP
GIS Manager, City of Auburn

144 Tichenor Avenue • Auburn, Alabama 36830
(334) 501-7260 • FAX (334) 501-7299 • www.auburnalabama.org

PROJECT TEAM





Software and Implementation Services for Community Development System City of Round Rock, TX

Key Personnel

Project Director and Main Proposal Contact

Lou Garcia, Principal, PMP | Telephone: 443.904.3897 | E-mail: louis.garcia@timmons.com

As Project Director, Lou will work alongside Michael (Project Manager) to ensure all tasks and expectations are met by Timmons Group. Lou will also be responsible for the management of resources and overseeing finances to ensure the project progresses on time and under budget. He has over 30 years of experience authoring and managing numerous project management plans, needs analyses, strategic plans, and implementation plans for Asset Management and Geospatial Technology products and services.

Project Manager

Michael Edwards, PMP | Telephone: 804.402.7300 | E-mail: michael.edwards@timmons.com

Michael is the Project Manager assigned to this project. Upon award, he will be responsible for the day to day communications with Round Rock, coordination of activities relating to the installation and implementation team and will ensure successful accomplishment of the scope of work – all within the contract budget and project schedule. Michael now leads the successful implementation of Cityworks AMS and PLL for clients across the United States. Michael has also led the successful integration of Cityworks with numerous 3rd party applications as well as data conversion from legacy permitting systems such as TrakIT. Michael is also capable of managing the development of complex tools that integrate seamlessly with Cityworks.

Additional Key Personnel

Ron Butcher, MBA, GISP, Principal in Charge Ron's background in the development and implementation of asset management projects affords us added depth and the ability to leverage his additional real world experiences in all of our consulting efforts. Ron will serve as the Principal in Charge for this project. He will be responsible for overseeing all technical aspects of the Round Rock engagement to ensure the development and delivery of an enterprise solution focused on Savannah project goals and objectives.

Kyle Kojan, Technical Lead Kyle has experience conducting discovery workshops for both Cityworks implementations and integrations with other systems. He is also experienced in performing data migrations from legacy systems into Cityworks. In addition, Kyle has led training sessions and developed design documents for integrations and customizations to the Cityworks software. Kyle has worked closely with the Timmons PLL Portal on a number of projects, and is well versed in the functionality and implementation process for the portal. Kyle is also a certified installer of the OnBase document management software, and has worked on projects that integrate the OnBase Plan Review module with the Timmons Portal. Kyle has the extensive knowledge needed to fulfill the requests of any project and has shown to be a valuable asset to our Cityworks AMS and PLL implementation teams.

Ryan Torino, PLL Configuration Ryan is an Analyst who has extensive experience working on various GIS projects across multiple levels of state and local government. His project experience includes Next-Generation 911 data maintenance for local governments, parcel data maintenance, stormwater/sewer data maintenance, road centerline maintenance, and right-of-way maintenance. During his time at Timmons Group, he has served in several staff-augmentation assignments at Chesterfield County and the Virginia Department of Transportation where he took the initiative to identify and implement business practices to more efficiently maintain various GIS datasets. Ryan transitioned to the Asset Management and Community Development group at Timmons Group in September 2019 and has worked on various Cityworks implementation projects including the City of Asheville, the City of Fayetteville, Napa Sanitation, Douglasville-Douglas County Water and Sewer Authority, and the City of Toledo. Ryan is very proficient working with SQL, Crystal Reports, and ArcGIS, and having an extensive background in GIS, he uses this background to optimize the clients' utilization of Cityworks in conjunction with their GIS data. Ryan is a superb communicator, problem-solver, and always strives to ensure he meets the client's needs and expectations.

Patrick Wade, PLL Configuration Patrick has considerable experience working with GIS for a wide variety of projects involving field data collection, spatial analysis, and application development. He has used GIS to maintain and create large datasets for addressing, natural and municipal resources, parcels, sustainability projects, and a range of utility assets. Added to Timmons Asset Management team in 2019, Patrick has worked on a number of projects with clients, including Albemarle County Service Authority, Asheville Department of Public Works, City of Salem, Virginia, and West Valley City, Utah. He has assisted in the development and implementation of Cityworks AMS and PLL applications for clients and is experienced in creating solutions to meet or exceed client expectations.



Software and Implementation Services for Community Development System City of Round Rock, TX

Ethan Reuse, Business Analyst Ethan has excellent GIS technical analytical skills and has worked on GIS field data collection and validation projects for 911, electric power distribution, and water utility location. He has GIS data maintenance and update experience including: parcels, Structures, addressing, utilities, and natural resources. He is skilled in implementing Cityworks AMS/PLL server and has done so successfully for a handful of clients. He has also successfully performed on site training and workshops for the following clients: City of Asheville Department of Public Works, Spotsylvania County Department of Public Utilities, MidPeninsula Regional Open Space District, and the City of Madison, Wisconsin. Through these trainings he has developed training documentations and has developed bonds with the clients while being onsite. Ethan has become experienced in editing and customizing work activity pages in Cityworks using XML to meet the needs and wants of the clients that is not available in Cityworks directly out of the box.

River Stallings, Data Conversion/Integrations River is an Applications Developer at Timmons Group. He is experienced with software development including web, desktop, and console applications, server deployment, data analysis, unit testing, and database development. His skills include C#, PHP, Ruby, JavaScript, JQuery, CSS 3, HTML 5, Bootstrap, .Net, MVC, UX design, ESRI JavaScript API, Google Maps API, PublicStuff API, Cityworks API, and SQL and Oracle database scripting. River has the extensive knowledge needed to fulfill the requests of any project and has shown to be valuable on our development team.

Zhiqiang Zhu, Integrations / Public Portal/Mobile Tools Zhiqiang is a GIS applications developer at Timmons Group. He has a diverse background in design and coding development in GIS-based projects and as full-stack .Net developer on desktop and web-based projects using hybrid programming languages (C#, JavaScript, T-SQL & PL/SQL) in Agile and Scrum / Kanban environment with TDD and SOLID as best practices. He communicates effectively with clients and product manager to prioritize deliverables. He is flexible in roles and always ready to help others to ultimately achieve team goals. Zhiqiang learns new technologies quickly to adapt new requirements while delivering quality work product on time.

Dakota Talley, Data Conversion/Integrations Dakota is a GIS Analyst in Timmons Group's Asset Management and Community Development group. He has experience in GIS, cartography, and programming with a focus on systems integrations for local governments. He is proficient in the following programming languages: ArcGIS, Java, Python, and SQL. During his time at Timmons Group, Dakota has played a valuable asset to our team in the support of seamless implementations and integrations of asset management systems for our clients.

Detailed resumes are included on the following pages:



Lou Garcia, PMP | Project Director, Timmons Group

Education

BS, Geography and Environmental Planning, Towson University, 1989

Experience

30 Years

Certifications

Project Management Professional (PMP), Project Management Institute; March 2009

Cityworks AMS Server; June 2012

Miller-Hieman Business Development Training; December 2005

Staff Management Training; August 2005

Spatial Database Standards for Infrastructure and the Environment 2.5 ; (SDSFIE) March 2005

Mapping Grade GPS Training; December 2004

Trimble Survey Grade GPS Training; November 2004

Project Management Training, American Management Association; March 2001

Lou Garcia is a Senior Project Manager with over 30 years of experience in Consulting and Project Management of Enterprise Asset Management, GIS, engineering, and surveying projects. He has experience at the technical consultant leadership level in applying analytical processes to the planning, design, acquisition, and implementation of new and improved business processes, GIS tools, productivity tools, and services. He has authored and managed numerous project management plans, work plans, needs analyses, strategic plans, and implementation plans for Asset Management and Geospatial Technology products and services.

Select Project Experience

- Cityworks Server PLL Implementation for New Asset Tracking, Spotsylvania County Department of Utilities, VA
- Cityworks Server AMS & PLL Software Implementation, City of Alpharetta, GA
- Cityworks Server AMS and PLL Software Implementation, Winston-Salem, NC
- Implementation Services for Cityworks PLL Phase 1, Escondido, CA
- Cityworks PLL Integration, St. Johns County, FL
- Cityworks PLL Integration, Brookhaven, GA
- Public Facing Portal, West Valley City, UT
- Cityworks Server AMS Software Implementation, Bartow County, GA
- Cityworks Server AMS Software Implementation, City of North Miami Beach, FL
- Cityworks Server AMS Software Migration from Cityworks AMS Desktop, City of Lebanon, OH



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Ron Butcher, Jr., GISP, MBA | Principal in Charge

Education

MBA, Management Information Systems, University of Dayton, 2000

BS, Computer Science, Magna Cum Laude, Park University, 1994

Experience

18 Years

Certifications

GIS Professional (GISP)

GIS Surveyor (GISS), South Carolina

Ron is an accomplished Senior Manager with 18 years of success developing, integrating and aligning technologies to meet customer business needs and achieve corporate goals and objectives. Results-oriented director with effective balance of long-range vision and realistic pragmatism; highly adept at devising new strategies, tools and services that provide superior results at minimal cost. He is an inspirational and collaborative leader with a talent for building successful, long-term relationships with customers, forging consensus between stakeholders with various priorities, and developing cohesive, high-performance teams ready to meet any challenge.

Ron leads our team of subject matter experts focused on the delivery of Enterprise Asset Management (EAM) solutions required to solve the complex asset management challenges for our water, wastewater, stormwater, gas, electric and public works clients. He has significant Cityworks EAM implementation and system integration for utility customers throughout the United States.

Select Project Experience

- Cityworks Server PLL Implementation for New Asset Tracking, Spotsylvania County Department of Utilities, VA
- Cityworks Server AMS and PLL Software Implementation, City of Fayetteville, NC
- Cityworks Server PLL Implementation, Herndon, VA
- Cityworks Server PLL Implementation, Auburn, AL
- Cityworks Server PLL Implementation, Brookhaven, GA
- Cityworks Server PLL Implementation, Tallahassee, FL
- Cityworks Server AMS and PLL Software Implementation, Winston-Salem, NC
- Cityworks Server AMS Software Implementation, City of Naperville, IL
- Cityworks Server AMS Software Implementation, Hamilton County, TN
- Enterprise Work Management System, City of Alpharetta, GA
- Cityworks EAMS, Department of Public Utilities, Auburn, AL
- Cityworks EAMS, Lafayette Consolidated Government, LA
- Cityworks Computerized Maintenance Management System, Department of Public Utilities, Richmond, VA
- Cityworks EAMS Support, Department of Public Works and Environmental Services, Alexandria, VA

Michael Edwards | Project Manager, Timmons Group

Education

BA, Public and Urban Affairs, Virginia Tech, 2011

MS, Urban Regional Planning, Virginia Commonwealth University, 2013

Experience

8 Years

Michael is a Project Manager at Timmons Group with considerable experience in Cityworks consulting and enterprise system design gained through work with utilities, state and local governments and private industry. Michael began his career in urban planning where he quickly gained expertise in GIS systems, data collection and analysis. Michael now leads the successful implementation of Cityworks AMS and PLL for clients across the United States. Michael has also lead the successful integration of Cityworks with numerous 3rd party applications as well as data conversion from legacy asset management systems. Serving as our Product Manager for the Timmons Group Portal, our Mobile Inspection tool for Cityworks PLL and various Cityworks plugins, Michael is also capable of managing the development of complex tools that integrate seamlessly with Cityworks.

Select Project Experience

- Cityworks Server PLL Implementation for New Asset Tracking, Spotsylvania County Department of Utilities, VA
- Cityworks Server PLL Implementation, Charleston Water, SC
- Cityworks Server AMS and PLL Software Implementation, City of Fayetteville, NC
- Cityworks Server AMS and PLL Software Implementation, Winston-Salem, NC
- Cityworks PLL Implementation, St. Johns County, FL
- Cityworks PLL Implementation, Brookhaven, GA
- Cityworks PLL Implementation, Auburn, AL
- Cityworks Server Implementation (PLL), Tallahassee, FL
- Cityworks Server Implementation (AMS), Bartow County, GA
- Cityworks Server Implementation (AMS), Lebanon, OH
- Timmons Group PLL Portal, Product Development Manager
- Cityworks® Server AMS, Asset Management System Implementation, Garland, TX
- Skagit County Cityworks Enterprise Asset Management System Implementation, Skagit County, WA
- Milwaukie Cityworks Implementation, Milwaukie, OR
- Cityworks Data Conversion, City of Herriman, UT
- Cityworks Enterprise Asset Management System Implementation, Alpharetta, GA
- Cityworks AMS Implementation, Goochland County, VA

References

- Spotsylvania County, VA | Erik Ray | (540) 898-2053 | Eray@spotsylvania.va.us
- City of Auburn | Chris Graff | 334.501.7260 | cgraff@auburnalabama.org

Kyle Kojan | Technical Lead / Business Analyst

Education

BS, Environmental Studies, Virginia Commonwealth University, 2015

Experience

4 Years

Kyle is a GIS analyst at Timmons Group. He is experienced with data development, data analysis, GIS mapping, and project deliverable quality control based on defined parameters. He has extensive knowledge of Cityworks Server PLL and the Timmons Group PLL Portal. Kyle has experience conducting discovery workshops for both Cityworks implementations and integrations with other systems. He is also experienced in performing data migrations from legacy systems into Cityworks. In addition, Kyle has led training sessions and developed design documents for integrations and customizations to the Cityworks software. Kyle has worked closely with the Timmons Group PLL Portal on a number of projects and is well versed in the functionality and implementation process for the portal. Kyle is also a certified installer of the OnBase document management software and has worked on projects that integrate the OnBase Plan Review module with the Timmons Portal. Kyle has the extensive knowledge needed to fulfill the requests of any project and has shown to be a valuable asset to our Cityworks AMS and PLL implementation teams.

Select Project Experience

- Cityworks Server PLL Software Implementation, City of Winston-Salem, NC
- Cityworks Server PLL Software Implementation, Auburn, AL
- Cityworks Server PLL Software Implementation, Charleston Water, SC
- Cityworks Server PLL Software Implementation, Brookhaven, GA
- Cityworks Server PLL Software Implementation, Tallahassee, FL
- Cityworks Server PLL Software Implementation, Escondido, CA
- Cityworks Server PLL Software Implementation, Edmond, OK

Ryan Torino | PLL Configuration

Education

BA, Geography, Virginia Tech, 2012

Experience

6 Years

Ryan is an Asset Management/Community Development Analyst who has extensive experience working on various GIS projects across multiple levels of state and local government. His project experience includes Next-Generation 911 data maintenance for local governments, parcel data maintenance, stormwater/sewer data maintenance, road centerline maintenance, and right-of-way maintenance. During his time at Timmons Group, he has served in several staff-augmentation assignments at Chesterfield County and the Virginia Department of Transportation where he took the initiative to identify and implement business practices to more efficiently maintain various GIS datasets. Ryan is very proficient working with SQL, Crystal Reports, and ArcGIS, and having an extensive background in GIS, he uses this background to optimize the clients' utilization of Cityworks in conjunction with their GIS data. Ryan is a superb communicator, problem-solver, and always strives to ensure he meets the client's needs and expectations.

Select Project Experience

- Cityworks PLL Implementation, Charleston Water, SC
- Cityworks PLL Implementation, Edmond, OK
- Cityworks PLL Implementation, Toledo, OH
- Cityworks AMS Implementation, Escondido, CA
- Cityworks AMS Implementation, Public Works, City of Asheville, NC

Patrick Wade | PLL Configuration

Education

MS, Geographic Science, James Madison University, 2018

Experience

3 Years

Patrick has considerable experience working with GIS for a wide variety of projects involving field data collection, spatial analysis, and application development. He has used GIS to maintain and create large datasets for addressing, natural and municipal resources, parcels, sustainability projects, and a range of utility assets. Added to Timmons Asset Management team in 2019, Patrick has worked on a number of projects with clients, including Albemarle County Service Authority, Asheville Department of Public Works, City of Salem, Virginia, and West Valley City, Utah. He has assisted in the development and implementation of Cityworks AMS and PLL applications for clients and is experienced in creating solutions to meet or exceed client expectations. He has participated in weekly client and on-site meetings where he has communicated with and delivered results for clients. Patrick brings a strong background in GIS to the team and significant experience working with local and state governments, as well as a variety of other entities. He is very communicative, works hard to deliver exemplary and timely project results and updates, and has a passion for collaborating with a team, while serving the community through the work that he does.

Select Project Experience

- Cityworks PLL Implementation, Edmond, OK
- Cityworks PLL Implementation, Toledo, OH
- Cityworks AMS Implementation, Albemarle County Service Authority, VA*
- Cityworks AMS Implementation, Salem, VA*
- Cityworks AMS Implementation, Asheville, NC
- Public Facing Portal for PLL, West Valley City, UT

Ethan Reuse | Business Analyst

Education

BA, Geography, Virginia Tech, 2016

MS, GIS/Cartography, University of Wisconsin Madison, 2018

Experience

4 Years

Ethan has excellent GIS technical analytical skills and has worked on GIS field data collection and validation projects for 911, electric power distribution, and water utility location. He has GIS data maintenance and update experience including: parcels, structures, addressing, utilities, and natural resources. He is skilled in implementing Cityworks AMS/PLL server and has done so successfully for a handful of clients. He has also successfully performed on site training and workshops for the following clients: City of Asheville Department of Public Works, Spotsylvania County Department of Public Utilities, MidPeninsula Regional Open Space District, and the City of Madison, Wisconsin. Through these trainings he has developed training documentations and has developed bonds with the clients while being onsite.

Select Project Experience

- Cityworks PLL Implementation, Charleston Water, SC
- Cityworks PLL Implementation, Edmond, OK
- Cityworks PLL Implementation, Baltimore County, MD
- Cityworks AMS Implementation, Albemarle County Service Authority, NC*
- Cityworks Data Audit/Support, Spotsylvania County, VA*

River Stallings | Data Conversions / Integrations

Education

BS, Computer Information Systems, ITT Technical Institute, 2011

Experience

9 Years

River is an Applications Developer and Product Manager at Timmons Group. He is experienced with full-stack software development including web, desktop, console, and mobile applications, server deployment, data analysis, data modelling, data management, unit testing, and database development. His skills and knowledge areas include C#, PHP, Ruby, JavaScript, JQuery, CSS 3, HTML 5, Bootstrap, .Net, MVC, UX and UI design, ESRI JavaScript API, Google Maps API, PublicStuff API, Cityworks API, and MSSQL and Oracle T-SQL and PL/SQL database scripting. He has worked on PLL and AMS Cityworks data integrations with the SCADA, PublicStuff, Quickbooks, Wonderware, Munis systems. He has successfully integrated the Timmons Group PLL Portal with several payment processing systems including Elavon, Strip, PayPal, InvoiceCloud, OpenEdge, ETS, Trust Commerce, and iPament. River is also responsible for the development, management, and enhancement of the Timmons Group PLL Portal.

Select Project Experience

- Cityworks-Timmons Group PLL Public Portal Design and Development, City of Tallahassee, FL
- Cityworks-Timmons Group PLL Public Portal Design and Development, City of Winston-Salem, NC
- Cityworks-Timmons Group PLL Public Portal Design and Development, West Valley City, UT
- Cityworks-Timmons Group PLL Public Portal Design and Development, O'Fallon, IL

Zhiqiang Zhu | Data Conversions / Integrations

Education

BS, Computer Science, South China University of Technology, 2008

MS, Computer Science, Colorado State University, 2011

Experience

6 Years

Zhiqiang is a GIS applications developer at Timmons Group. He has diverse background in design and coding development in GIS-based projects and as full-stack .Net developer on desktop and web-based projects using hybrid programming languages (C#, JavaScript, T-SQL & PL/SQL) in Agile and Scrum / Kanban environment with TDD and SOLID as best practices. He communicates effectively with clients and product manager to prioritize deliverables. He is flexible in roles and always ready to help others to ultimately achieve team goals. Zhiqiang learns new technologies quickly to adapt new requirements while delivering quality work product on time.

Select Project Experience

- Savannah Cityworks AMS/PLL Implementation, Winston-Salem, NC
- Implementation of Cityworks Permits, Licensing and Land (PLL) software, Auburn, AL
- Cityworks PLL Public Portal, Fayetteville, NC
- Tallahassee PLL Portal Modifications, Tallahassee, FL

Dakota Talley | Data Conversions / Integrations

Education

BA, Geography, Virginia Tech, 2016

Experience

2 Years

Dakota is a GIS Analyst in Timmons Group's Asset Management group. He has experience in GIS, cartography, and programming with a focus on systems integrations for local governments. He is proficient in the following programming languages: ArcGIS, Java, Python, and SQL. During his time at Timmons Group, Dakota has played a valuable asset to our team in the support of seamless implementations and integrations of asset management systems for our clients.

Select Project Experience

- City of Brookhaven PLL Implementation, Brookhaven, GA
- Cityworks PLL Implementation, Escondido, CA
- Cityworks PLL Implementation, St. John's County, FL
- Cityworks PLL Implementation, Charleston Water, SC
- DDOT Cityworks Business Process Redesign, Washington, DC
- Madison Asset Management Implementation, Madison, WI
- Renton Cityworks AMS Parks Implement, Renton, WA
- Albemarle County Service Authority, Cityworks AMS Implementation, Albemarle County, VA
- Bellingham Cityworks AMS Implementation, Bellingham, WA
- Napa Sanitation Cityworks AMS Implementation, Napa County, CA

PROJECT UNDERSTANDING AND APPROACH

UNDERSTANDING OF THE PROJECT

Timmons Group understands that the City of Round Rock (Round Rock) desires a proposal to provide a migration from your existing system (TrackIT) to Cityworks PLL to support the Permitting, Development Review and Inspections processes that assure Round Rock adheres to local, state, and federal requirements and that citizens are protected from environmental or public safety hazards. The proposed software solution (Cityworks PLL) will increase the coordination between departments, will improve the accuracy and speed of the review of permit requests, provide support documentation for review decisions, and increase efficiencies in researching property history and ordinance violations for the City of Round Rock.

Our proposed scope of services includes:

Service item included in proposed scope	Timmons Group will provide	Task Reference
Set up all permit types and workflows in Cityworks PLL	Yes	Tasks 7, 8 & 9
Review workflows with City staff for final approval	Yes	Tasks 7, 8 & 10
Setup a fee schedule for all permit types, the vendor will be expected to establish fee calculations and GL account codes for each permit type	Yes	Tasks 7 & 8
Setup template letters to customers	Yes	Tasks 7 & 13
Set up invoice templates	Yes	Tasks 7, 8, 9 & 13
Provide training or opportunities to City staff	Yes	Task 14
Be onsite during the final go-live in order to quickly address any potential issues	Yes	Task 17
Provide after go-live support to resolve any potential conversion issues	Yes	Task 18

To meet these goals our approach will begin with the review of existing business processes so that the new technology supports best practice processes and operation improvements. By utilizing an iterative approach with an intuitive solution, Round Rock staff will be provided with the means to adopt best practices, streamline processes, manage costs and promote transparent access to permit and development management activity information. This effort will support Round Rock as it strives to provide an exceptional level of service to an increasingly technologically savvy and growing population.





Software and Implementation Services for Community Development System City of Round Rock, TX

To facilitate these goals Round Rock needs to evaluate, purchase, and implement Cityworks PLL. Timmons Group has addressed the following functional areas in the sections below:

- Land use-based record keeping including addressing, parcels and related zoning
- Pre-development review including requests for building permits through the Plans Review Process, Preliminary Plats and Site Development Plans
- Permit application processes, including but not limited to Building Permits, Electrical Permits, Plumbing Permits, Land Disturbance Activity Permits, Zoning Permits, etc. Cityworks PLL has the capacity to expand to include new permits and applications in the future.
- Permit issuance and fees payments
- Certificate of Occupancy and Certificate of Completion issuance and tracking
- Contractor licenses
- GL Code assignment/tracking
- Report development and research capabilities for permit, inspection and applications
- Code and Engineering

TECHNICAL APPROACH

Timmons Group has developed a phased and collaborative project approach that will provide the best overall solution to The City of Round Rock (Round Rock). Our approach for each major Stage and Task is centered on three major program components:

- Project Management
- Core Software Configuration
- Department (Functional Group) Specific Implementations & replacement/integration of/to various existing/future systems

Successful implementation of Cityworks PLL as a core technology for Round Rock requires a thorough understanding of the individual processes and information management applications used throughout the organization. An appropriate level of planning and strategizing is required to ensure the end-users' needs are identified, understood, and designed for prior to implementation.

In order to better demonstrate the implementation tasks to implement Cityworks PLL, and the Timmons Group PLL Portal, our implementation methodology is broken into 2 distinct phases as follows:

- **Phase 1 = Cityworks PLL implementation**
- **Phase 2 = Timmons Group PLL Portal implementation**

As previously stated, the success or failure of Cityworks PLL implementations is most often not attributable to the technology components, but rather to managing the implementation of the software solution and the organization's ability/inability to effectively achieve the change associated with the implementation. We will partner with Round Rock in developing a strong body of users throughout the implementation process. The widespread adoption that is often anticipated by the project stakeholders during the planning and development of enterprise systems can quickly wane shortly after implementation if the change process is not effectively managed.

The failure to adequately train and support new users is often a cause for immediate and permanent resistance to the adoption of the system. ***Incorporating a strong training and coaching program is an effective change management tool*** and appropriate budget allocations should be made and adhered to throughout the system implementation and adoption life-cycles. In addition, Round Rock would be well-served by identifying and empowering staff responsible for the daily operations and administration of the system. This individual (or individuals) should have a broad understanding of the varied services each department provides, the technique in which services are delivered, and the manner of how Cityworks solution supports the delivery of each service. The responsibilities will also include the coordination of various support mechanisms available to each end user for the assistance in expanding the user's knowledge of not just their role within the community development program, but also in a broader context of the overall importance of the enterprise community development program to the organization.



Software and Implementation Services for Community Development System City of Round Rock, TX

Preliminary Project Plan

This project will be serviced via our resources located in our corporate headquarters in Richmond, VA; as well as various other offices across the United States.

Round Rock is ready to begin implementation of Cityworks Server PLL to organize, manage and track its Permitting, Inspections, Licensing and Code Enforcement activities. Successful implementation of the Cityworks Server PLL solution as a core technology for Round Rock's Community Development System requires a thorough understanding of all the individual processes and business intelligence applications embraced throughout the organization. By utilizing Timmons Group's proven phased implementation approach we will be able to design a solution capable of delivering the desired functional goals, while providing the returns-on-investment upon which the project has been justified and its successes will be measured.

Successful program management requires a high degree of commitment to both operational and fiscal results; an acceptance of accountability for conformance to project requirements; and the people skills needed to forge a synergistic chemistry between diverse stakeholders

All Project Team members selected for this engagement have recent significant experience in the planning, design, and implementation of multiple enterprise Cityworks projects of varying depths and complexities. However, our experience indicates that these competencies alone do not automatically translate into successful projects. Rather, the key to project success is the proper utilization of available resources within the framework of a well-managed project plan that completely addresses each of the following processes:

- **INITIATION** – project authorizations and expectations
- **PLANNING** – project definitions, objectives, deliverables, and analysis of alternatives
- **EXECUTION** – coordination of resources, quality control, delivery of products and services
- **CONTROLLING** – monitoring and measuring to identify variances and initiate corrective actions
- **CLOSING** – acceptance of project results and deliverables

With our Project Manager serving as the hub of our team, and the conduit of communications between our subject matter experts and the Round Rock Core Team, we propose to utilize the following management tools in order to programmatically and proactively manage the proposed project to a successful end.

The following implementation and support functions will be addressed in the project plan with designations for each implementation/deployment phase recommended:

- Project Planning/Execution
- Communications Planning/Execution
- Infrastructure/Hardware/Environment Configuration and Build, if applicable
- Business Review, GAP Analysis and Solution Recommendation
- System/Application Configuration and Validation
- Data Analysis, Design and Development
- Customization/Interface Analysis, Design and Development
- Testing (System, Performance and User Acceptance Testing)
- Training and Documentation
- Implementation
- Operations, Maintenance and Support

The Timmons Group approach to the Cityworks® Server PLL implementation and configuration is to work interactively and iteratively with Round Rock, to identify and rank the workflows and interactively model the processes in PLL. Through this effort Round Rock staff, who are designated to manage and maintain PLL, will participate in the development process and learn the nuances of building the workflows, templates, and cases. A comprehensive training program that is focused on creation, maintenance, and administration of PLL using Round Rock specific workflows created in conjunction with Round Rock staff will be pursued. Our team has found this process to be cost effective and ensures our clients are comfortable in taking ownership of their PLL environment. At a minimum the configuration will include the following for the PLL implementation process:

Planning and Zoning

Site Plan Review

Software and Implementation Services for Community Development System City of Round Rock, TX

Fee Calculation	Permits
Building Plan Review	Inspections
GL Account Codes	Contractor Licensing

The implementation team will facilitate a series of onsite workshops with identified Cityworks users for the purpose of establishing the necessary understanding of individual responsibilities, work processes, regulatory stressors, etc. We also understand that converting legacy data from the existing software product (TrackIT) will be necessary within our proposed scope of services. By gathering and analyzing the end user requirements, the implementation team will best prepare us to implement Round Rock's solution such that the individual user requirements are able to be met in the context of Round Rock's over-arching strategies.

Our Approach to Project Management

Timmons Group specializes in delivering community development solutions for our clients. We have accumulated years of experience and lessons-learned that has shaped our project management and implementation approach. Our project manager will be responsible for:

- Facilitating meetings between the Timmons Group team and Round Rock's project stakeholders;
- Preparing for, and conducting, all on-site and on-line meetings;
- Reporting risks and impediments to the team as issues arise and maintaining a risk registry on our web-based project portal;
- Maintaining the project work plan and project schedule;
- Managing change; and
- Monitoring and reporting project performance.

Project Management Plan (PMP)

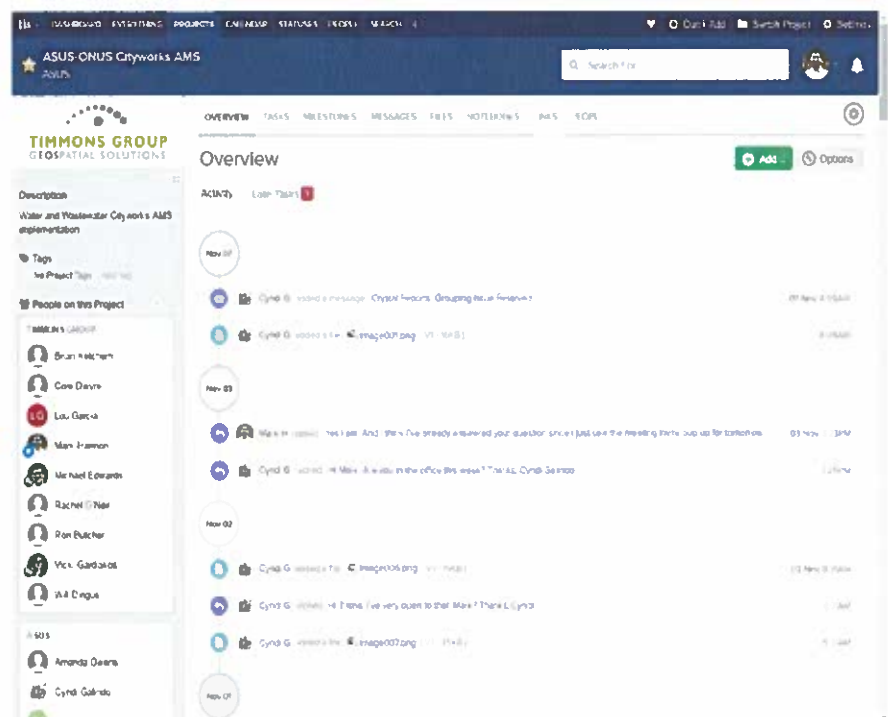
The PMP integrates and consolidates all of the subsidiary management plans from the planning process, including:

- Scope management plan (including the change management process)
- Schedule management plan
- Cost management plan
- Quality management plan
- Human resource plan
- Communications management plan
- Risk management plan
- Procurement management plan

Project baselines are established for schedule, cost and scope. These baselines are combined into a performance measurement baseline against which integrated performance can be measured throughout project execution. Our Project Manager will develop and deliver a PMP outlining the tasks, schedule, deliverables/milestones, communication plan and the associated resources (internal/external) necessary for the project to be successful.

Project Tracking and Reporting

Timmons Group will maintain procedures throughout the project for tracking and reporting progress. We will utilize the already established, dedicated, secure online project portal that provides centralized, on-demand access to project documents and status, that we are currently using for the Cityworks AMS Roadmap project. Our approach to project management is very "hands-on" and will support constant communication to minimize project risk, remove impediments to progress, and to ensure that we are delivering the best possible solution.



Software and Implementation Services for Community Development System City of Round Rock, TX

Standard project management documents that will be posted to the project portal include: bi-weekly status reports (MS Word), current and past versions of the project work plan (MS Project), key project decision log, risk register and a task/action item log. At the end of each month we will provide Round Rock with a project status report that documents the activities performed during the previous month. At a minimum the report shall address the following:

- Status of all tasks;
- Planned work to be carried out in the ensuing month;
- Problems (risks and impediments) encountered;
- Mitigation actions taken to resolve problems;
- Key decisions (technical and administrative);
- Open action items;
- Schedule update;
- Financial update; and
- Project performance measurements

Questions and Issue Tracking

Timmons Group recognizes that communication between Round Rock and our project team must follow a standard flow, if the project is to succeed. We will assume the primary role of controlling communication between our project team members as well as Round Rock employees. Should issues arise during the course of the project, we will log and track issues and key decisions (administrative and technical), questions, and action items in order to ensure that the decisions made during the communications are appropriate and that all resolutions are documented. The project tracking log will be maintained on the project portal.

The goals of Timmons Group's communication plan are to ensure that the project objectives are clearly articulated and met, that tasks are completed on schedule, issues are identified and promptly resolved, and that project status is continuously communicated to Round Rock core team. The communication plan addresses the primary aspects of project communication, including:

- What is being communicated
- To whom it is to be communicated
- How it is to be communicated (e.g. In-person, e-mail, call, etc.)
- When it is to be communicated

Timmons Group will employ a proactive approach to project communication, consisting of the components more fully defined below, to ensure the proper and efficient utilization of resources and the timely delivery of products and services within the framework of the project Scope of Work.

Scope Management Plan

Understanding that issues will arise during the project that may require changes to the agreed-upon scope of work, a proactive method of identification and management of these issues must be utilized. Timmons Group uses a Change Control Process that is illustrated in the following process flow diagram: Final project costs are established through the development of a detailed Scope of Work – one that establishes what products and services will be delivered as well as those that will not be provided as part of the established fee. A level of open and honest communication among all stakeholders is required such that system functionality can be balanced with available funding, and appropriate and reasonable expectations set. Once these elements have been addressed, cost control becomes a multi-tiered effort involving effective project management, clear communication among stakeholders (especially the Project Managers), schedule management, and quality control. To protect both parties, client and consultant, a Change Control Process must be developed and adhered to throughout all phases of the project.

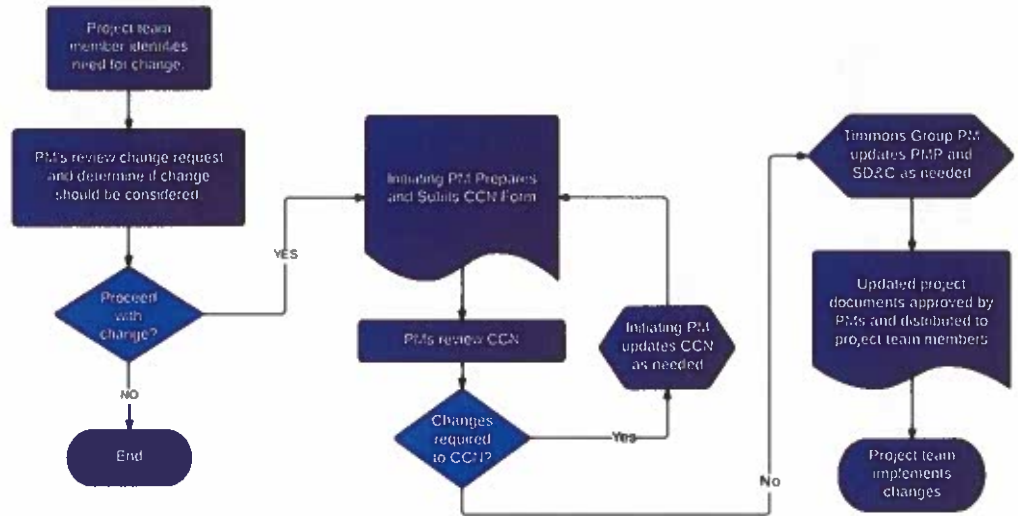
Any modifications or deviations from the agreed upon Scope of Work, including system functionality, service delivery, technical documentation, or project schedule or budget will be subject to Change Control procedures:

Any project team member may initiate a Change Request whenever there is a perceived need for a change that will affect the desired or anticipated outcome of the work or any element of the project. The project team member should use a Change Control Notice (CCN) form as appropriate for the change:

1. Agreement to a Change Request signifies agreement to a change in overall costs, functionality, time scales, or other identified project impact.
2. Changes will be identified and communicated by / to the respective Project Managers by any of the prescribed communication channels. Change Requests may be introduced via verbal conversation or other form of communication but must be supported by the appropriate CCN document.

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3. All CCN's will be signed by both the Timmons Group and Round Rock Project Managers to indicate acceptance of the changes.
4. All project participants should understand that time is of the essence when initiating, reviewing, negotiating, and approving Change Requests, as any delays to work in progress caused by a CCN may impact the overall project schedule.



The CCN template proposed for this project is presented on the following page. A complete library of CCN documents will be developed and archived for team reference as the project progresses.

Schedule Management Plan

Timmons Group utilizes Microsoft Project to track all tasks, milestones and dependencies of our enterprise asset management projects. The change control process is the same as the process outlined in Scope Management Plan. The schedule is reviewed at project progress meetings and any changes are agreed upon by the project team (which includes Round Rock stakeholders).

Risk Management

Risk Management is managed via project progress meeting and communicated via a shared document that identifies the risk, color codes the risk based upon several criteria and specifies a mitigation strategy. The Risk Register is included within the project progress report that will be provided to the project upon an agreed upon interval.

Our Approach to Quality Control

Quality Control on a Timmons Group Cityworks implementation project is on-going throughout the life of the project. In addition to formal items such as a Project Management Plan, Testing Plan and an Acceptance Plan and Acceptance Certification, we employ several quality control measures throughout the life of the project. We have assigned a Project Director to this project. In this role the Project Director will act as the Senior Technical Reviewer for all project deliverables. Specific quality control procedures include internal review meeting between the Project Director and the project team as well as a formal change control process to deal with project changes. Timmons Group has clear and defined roles for the Quality Control responsibilities of all staff members. Because all staff levels of the project team are involved in delivering quality service to our clients, each employee is given the necessary training and orientation to perform a specific task. Prior to being assigned to a specific Quality Control responsibility, staff members must meet minimum qualifications and must be approved by the Principal in Charge. Timmons Group has an established program for

IV. Risk management status:

#	Potential Risk	Priority	Control Measures	Status
1	Group 1 Configuration	High	Timmons has placed work plan for resource dedication into action for reaching/sustaining project schedule	In process
2	Group 1 data conversion	High	Timmons has placed work plan for resource dedication into action for reaching/sustaining project schedule	In process
3	Group 1 reports	High	Timmons has placed work plan for resource dedication into action for reaching/sustaining project schedule	In process
4	811 Data Import Tool	Medium	Timmons has placed work plan for resource dedication into action for reaching/sustaining project schedule	In process
5	Training	High	Week of Oct. 16 & Oct. 23 rd needs confirmation by Metro	In process
6	Group 1 Go live	High	Items 1-5 must occur by due date to meet this date. Timmons PM & Metro PM to work to make sure these items occur as necessary	In process
7	Group 2 configuration	Low	LOE for group 2 is low	



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project Quality Control that is incorporated into our contract management process. Our primary means of building quality into every phase of each project is through the use of assigned senior technical reviewers (STR) and periodic QA reviews at the program level. Our reputation is built on the execution of existing work and products. Timmons Group has an excellent track record of providing high-quality services to public agencies, as demonstrated by our strong past performance ratings.

The goal of this phase is to develop an initial Project Management Plan (PMP) document, and to accomplish the initial data gathering prior to the kickoff meeting. This task "primes the pump" for the kickoff and configuration workshops and ensures there will be no IT related bottlenecks related to hardware or software purchases.

Our team utilizes a formal Project Management Plan (PMP) process for documenting, tracking and communicating the key elements of a project, which include: Project scope, schedule, work plan (including staff, stakeholders and other resources), budget, communication plan, definition of project goals and critical success factors, definition of team member roles and responsibilities, project assumptions, change management and risk management. The purpose of the PMP is to ensure that the project objectives are clearly articulated and met, that tasks are completed on schedule, issues are identified and resolved promptly, and that project status is continuously communicated to project team members. Our Project Manager will draft a PMP for an initial review by Round Rock's Project Manager and other staff during the kickoff meeting.

Communication Management

The goals of Timmons Group's communication plan are to ensure that the project objectives are clearly articulated and met, that tasks are completed on schedule, issues are identified and promptly resolved, and that project status is continuously communicated to Round Rock core team. The communication plan addresses the primary aspects of project communication, including:

- What is being communicated
- To whom it is to be communicated
- How it is to be communicated (e.g. In-person, e-mail, call, etc.)
- When it is to be communicated

Timmons Group will employ a proactive approach to project communication, consisting of the components more fully defined below, to ensure the proper and efficient utilization of resources and the timely delivery of products and services within the framework of the project Scope of Work.

Bi-Weekly Status Call and Minutes – Timmons Group's Project Manager will prepare an agenda for and conduct a bi-weekly status call related to the specific work-in-progress of the project team. The Project Manager shall record and report via meeting notes the results and action items required. Bi-Weekly Status Calls can be regularly scheduled.

Bi-weekly Status Reports – Timmons Group's Project Manager will prepare monthly status reports using the template presented on the following page. Every other (roughly) bi-weekly status report shall be delivered to the Round Rock core team with each month's invoice. Bi-weekly status reports will also be archived online for additional, on-demand access. Monthly Status Reports are due within the fourth full week of the month, prior to the bi-weekly status call.

Project Report				
Project Name:				
Project Client:				
Project Number:				
Report Name:				
Report Date:				
Report Author:				
Report Distribution:				
Executive Summary:				
What we accomplished in the last month:				
1. 2.				
Deliverable	First Revision Status	Second Revision Status		
What we plan to accomplish in the next month:				
1. 2.				
Summary of anticipated and approved changes in project scope/schedule/budget:				
•				
Status of schedule and deliverables:				
Deliverable	Current Forecast	Actual	Status	Signoff
Risk management status:				
#	Potential Risk	Priority	Control Measures	Status
		Moderate		

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Ad-Hoc Meetings – As is required throughout the duration of the project, additional meetings may be called by either Project Manager to address personnel, scheduling, technical, or other project issues. These meetings will typically be held via teleconference. Project team members will participate in these meetings as necessary. The Timmons Group Project Manager will document the meetings and distribute a summary to all project team members via email. The dates for project calls, meeting and reports will also be maintained on the project calendar, which will be available online for easy, on-demand access.

Task 1: Project Management

All Project Team members selected for this engagement have recent significant experience in the planning, design, and implementation of multiple Cityworks AMS and PLL projects of varying depths and complexities. However, our experience indicates that these competencies alone do not automatically translate into successful projects. Rather, the key to project success is the proper utilization of available resources within the framework of a well-managed project plan that completely addresses each of the following processes:

- **INITIATION** – project authorizations and expectations
- **PLANNING** – project definitions, objectives, deliverables, assumptions, and analysis of alternatives
- **EXECUTION** – coordination of resources, quality control, delivery of products and services
- **CONTROLLING** – monitoring and measuring to identify variances and initiate corrective actions
- **CLOSING** – acceptance of project results and deliverables

With our Program Director and Project Manager serving as the hub of our team, and the conduit of communications between our subject matter experts, third party vendors and Round Rock stakeholders, we propose to utilize the following management tools in order to programmatically and proactively manage the proposed engagement to a successful end. Timmons Group will provide the following Project Management services throughout the duration of the Contract:

- Review, analyze, and consult upon Round Rock current business processes communicated by staff.
- Develop, in cooperation with Round Rock Project Manager, a Project Plan, Communication Plan (within Project Plan) and Schedule
- Proactively manage and update the Project Plan, Communication Plan (within Project Plan) and Schedule, as required, throughout the duration of the Project. The Project Plan, Communication Plan (within Project Plan) and Schedule modifications will be facilitated upon common agreement between Round Rock and Timmons Group in accordance with the Change Control Notice process.
- Coordinate project events with Round Rock Project Manager and Timmons Group Team members
- Author, edit, review, and distribute project documentation and technical reports, as required
- Facilitate in-process review meetings with Round Rock Project Manager and end-users as scheduled, and appropriate, throughout the duration of the project
- Anticipate problem areas and propose and facilitate solutions (i.e. risk management)

Round Rock Responsibility – Round Rock project manager/team will review the Project Management Plan and ensure it meets Round Rock's requirements. The Round Rock project team is typically comprised of the following roles:

- Round Rock Project Manager
- Code Enforcement Officer
- Planner or the Planning & Zoning Coordinator
- Building Inspector
- Permit Technician
- Business Licensing Clerk
- GIS Analyst

Deliverables – Project Management Plan that will be managed over the life of the project.

Assumptions – Round Rock will review all documentation in a timely manner.

Task 2: Project Kick-off Meeting

Project team members and participating Round Rock staff will participate in a Project Kickoff Meeting to be held for the purpose of introducing the project participants, to establish the roles and responsibilities of all Project Participants,



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validate Round Rock goals and objectives, establish the lines of communication to be employed throughout the duration of the project, and to answer any questions Round Rock staff may have.

Round Rock Responsibility – Round Rock stakeholders will attend the project kickoff meeting.

Deliverables – Project presentation and meeting minutes.

Assumptions – Round Rock will provide a conference room appropriately sized for the number of participants.

Task 3: IT/GIS Systems Workshop

Our configuration team will meet with the Round Rock project management and IT staff to discuss and define the hardware and technical requirements for the Cityworks PLL implementation that may go beyond what we already understand based upon previous conversations with your staff. We understand that the PLL software will likely be installed in and operate on the existing Cityworks AMS platform hardware. During this meeting various system architectures and minimum requirements will be explored to find the best fit for Round Rock. The goal is to ensure hardware is in place prior to initial software configuration. If during this process it is determined that additional server resources are necessary Timmons Group can work with Round Rock to procure this hardware or to explore various hosting options. We are comfortable with either deployment strategy.

Our Team will document the Core System Design Plan components (hardware & software) required to support the Cityworks PLL implementation. If deficiencies exist, we will provide an outline of recommended upgrades, configuration changes or other technical adjustments. The Core System Plan is developed in preparation for the configuration and implementation of the Cityworks PLL System. This plan will include the following:

- Review of current Cityworks AMS test and production platform including to see how/if PLL will work within the same environment:
 - Utilization
 - Performance
 - Architecture
 - Servers
 - Database
 - Software
- Network Requirements
- Hardware Requirements
- Peripheral Requirements
- Software Applications
- GIS data in support of Cityworks PLL

Round Rock Responsibilities - Round Rock is responsible to have IT & GIS staff present for the IT System meeting that are knowledgeable on the current Round Rock infrastructure and any planned modifications during the life of the project.

Deliverables – Core System plan for Hardware, Software, network configuration and GIS requirements for Cityworks PLL. Report detailing the existing technical test and production environments including any recommended upgrades or enhancements or licenses required to test or deploy Cityworks Server PLL.

Assumptions – Round Rock will purchase the Cityworks® Server PLL software. Round Rock will review all documentation in a timely manner.

Task 4: Data Gathering

The goal of this task is to meet with Round Rock departments and gather critical information that will be later loaded into the PLL environment. Data that will be gathered includes:

- Identify Database and Domain Administrators
- Identify PLL Administrator
- Identify PLL Users
- Select PLL Login Security Model
- Define ArcGIS Services
- Identify Email Settings for PLL
- Identify Contractors
- Permit Application Forms
- Reports and Printed Forms (permit cards, certificates of occupancy, violation notices, etc.)

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- Code Violation List
- Building Corrections List
- Frequent Applicants

Round Rock Responsibility – Round Rock staff will be available to assist with obtaining all information identified during the data gathering process.

Deliverables

- Systems Configuration Document (details which servers will be utilized by Cityworks and what software and the versions that will be installed on each server along with GIS services to be utilized for the Cityworks map)
- Round Rock to provide a PLL user list along with employee details (login name, email address, title, and department/division)
- Round Rock to provide list of contractors
- Round Rock to provide a list of Code Violations

Assumptions

- Esri ArcGIS Server installed and configured
- Necessary hardware and ancillary software available

Task 5: Install Cityworks Server PLL

Our configuration team will work with Round Rock IT staff to configure the Cityworks PLL software at Round Rock's facilities into a development environment. Our configuration team will work directly with Round Rock's Project Manager to verify that all core system components (servers, clients, RDBMS, networking devices, and supporting software programs) are installed and appropriately configured. Our configuration staff will be assisted remotely to facilitate Cityworks software installation, set-up, and configuration.

Round Rock Responsibility – Software and hardware for Cityworks installation and configuration. Software should already be setup from prior Cityworks AMS project, so task will be on running scripts for PLL configuration.

Deliverables – Cityworks PLL installed in a development environment.

Assumptions – Round Rock IT will ensure that software, hardware, and network connectivity meets Cityworks implementation specifications and specified in the Core System Design Plan. Round Rock IT staff will be available to assist our configuration team during Cityworks installation.

Task 6: Identify, Prioritize, Define, Workflow, Report, & Data Migration

The goal of this task is to identify and prioritize the permit types and workflows based on complexity, commonality, and impact on Round Rock.

- Workshop to identify and prioritize workflows & reports
- Receive and understand existing fee schedules and GL account codes for each permit type
- Introduction to PLL and security roles
- Receive existing letters and invoice templates

Round Rock Responsibility – Key Round Rock staff will participate in the requirements definition and workshops.

Deliverables

- Prioritize list of Round Rock Workflows based on Department
- Workflow documentation (existing)

Assumptions

- Documentation on workflows will be provided prior to system design
- Samples of reports will be provided by Round Rock
- Necessary Round Rock staff will attend and participate in meetings and workshops
- Round Rock will provide documentation on fee schedules
- Round Rock will provide documentation on existing GL account codes
- Round Rock will provide documentation on existing letters to applicants & invoice templates

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Task 7: PLL Workflow Workshops

Our configuration team will conduct two separate three-day in duration workshops to begin the process of documenting the details of each case identified to be built in PLL. The workshops act as a discovery process to identify all of the components that are required to configure each case in PLL. Workshops sessions are typically broken down by division or workgroup to discuss cases handled by each group. Sometimes a representative from each division may need to be present for cases that have workflow tasks that span multiple workgroups.

Each workshop session begins with a brief software demonstration of Cityworks Server PLL to help familiarize participants with the core components and functionality of the software. The demonstration will give the workshop attendees an opportunity to review and understand the software, potential impacts and changes in their daily business processes, and the purpose of adopting these tool sets. It has been our experience that successful adoption of Cityworks is increased through repeated exposure of the software during the workshops.

During the workshops our configuration team will analyze the various technological, operational, and organizational elements of City's business for the purpose of ensuring the planned Cityworks implementation and expected system integrations are capable of delivering the feature-rich data needed to support the numerous complex operations and activities undertaken by the various departments.

In support of these efforts, our configuration team will analyze with Round Rock the following critical elements:

- **Workflows & Tasks** – Identify the current tasks and decisions that are involved with the workflow for each PLL case. The implementation team will identify points of possible improvement in existing workflows and discuss how current business processes may change or be modified to fit within the Cityworks application. The workflow review will identify each task within the workflow, all of the possible outcomes for each task, and the party responsible for completing tasks. Task results can trigger changes in case status, dictate path that the workflow follows, and send email notifications.
- **Data Requirements** – Review of the current application forms, requirements for submittal, checklists, violation lists, contractor lists, and other data that needs to be tracked and recorded as part of a case. Existing documents are reviewed on-site, and the configuration team will discuss with Round Rock how various items will fit into the Cityworks system. This will help give Round Rock some insight on what their data will look like in Cityworks.
- **Fee Calculations** – Identify the fees associated with each case and the information used to calculate the fees. The fee schedule is reviewed to ensure both parties understand all fees involved and how they are calculated and when they are assessed. This includes fees for application submittal, permits, and violations.
- **Reports/Printing/Notifications** – Reports, printing needs, and notification requirements are identified and documented during the review of the case workflows. The system will be configured to meet reporting requirements. Items like permit cards, notification letters, and notice of violations are also documented as these items will need to be developed as custom Crystal Reports that can be printed. Email notifications are also identified to be included in the configuration.
- **Systems and Applications** – Information technology and process automation tools currently deployed and maintained by Round Rock should be investigated and analyzed in terms of their ability to support the increased network traffic, data loads, and application maintenance requirements introduced by the planned Cityworks program. Additionally, existing business applications such as network modeling, mobile computing, customer relationship management, etc., should be investigated to determine the best manner by which to integrate with the planned Cityworks system.
- **Data** – Existing data sets (spatial and tabular) maintained for the purpose of supporting the daily operation and maintenance of the departments and their associated processes must be inventoried and analyzed for the purpose of supporting the development of any required data conversion/migration/development plans.
- **Best Practices** – Established permitting and code enforcement best practices, as they relate to Round Rock's current operational mandates, contrasted with where the various departments currently fall within the spectrum, should be established and benchmarked for the purpose of establishing the required system implementation path needed to guide Round Rock to its ultimate Cityworks deployment and adoption goals and objectives.



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These core elements are the major components that will provide our configuration team and Round Rock an understanding of the needs and challenges the departments will face as they move to implement Cityworks. The initial business process analysis provides our configuration team with a detailed look into the everyday processes marshaled by Round Rock staff. A primary objective of this task is for our configuration team to review and understand how the Round Rock conducts business and manages its processes. The ultimate goal is to provide knowledge to support and enable our configuration team to properly address the technological impacts of the system deployment and Round Rock to understand the technological impacts and the non- technological impacts related to business processes and workflows.

This is an iterative process so for every workshop there will be a review and modifications made as identified in the project plan.

Round Rock Responsibility – Aid Timmons Group configuration team's Project Manager in developing a comprehensive agenda based on department and key staff. Participate in workshops and review SD&C Plan drafts. Provide data and discuss workflows identified in the workshops.

Deliverables – Workshop meeting minutes, workflow models, and high-level integration/interface document that are all part of the PLL SD&C Plan.

Assumptions – Round Rock will provide a conference room appropriately sized for the number of participants. Critical Round Rock staff will attend workshops and defined by the configuration workshop agenda.

Task 8: System Design and Configuration (SD&C) Plan

Once all of the required information about the PLL case data and workflows are gathered and analyzed our configuration team will work together to analyze and document the current status of the primary components of the business process. The SD&C will also fully define the integration of various systems identified and Cityworks PLL. Specifically, these components will be analyzed:

- **Case Data and Workflows and Fees** – This is the core of the PLL system. During the workshops detailed information will be documented that includes workflows, fees, case data, users, contracts, etc.
- **Enterprise Interface/Integrations** – Define possible high-level interface/integration requirements and model within Visio for interface/integration with Round Rock's enterprise systems. This needs to be done at this level so that the configuration of PLL is done with the possibility to these future integrations. Without doing this at this stage, possible re-work of workflows may be necessitated with future integrations.

During the PLL configuration workshops, our implementation team will develop the workflows of the new system with the workshop participants. The recommended changes will strive to enhance the efficiency of required tasks and follow industry best practices, as well as to enhance the satisfaction of the citizens/businesses being served. The resulting Software Design and Configuration plan will be the floor plan for the configuration of PLL and will document the "to-be" workflows.

Round Rock Responsibility – Review of SD&C Plan drafts within five (5) business days.

Deliverables –SD&C Plan drafts.

Assumptions – Round Rock will review all documentation in a timely manner.

Task 9: Cityworks PLL Database Configuration

The configuration team will take the information gathered and documented and configure the Cityworks database. This task will take place within the development environment. The configuration of Cityworks will be based on the Cityworks Configuration Document and the SD&C Plan developed from the onsite workshops.

Services for this task will include, but are not limited to:

Users/Employees	Departments/Divisions
Case Templates	Case Types/Subtypes
Status Codes	Tasks/Workflows
Checklists	Case Data
Fee Setup	Violations Library



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Conditions	Flags
Contractors	People
GL Codes	Permit letters/templates

Round Rock Responsibility – Round Rock will continue to review and comment on Cityworks environment.

Deliverables – Updated Cityworks Configuration Document and SD&C Plan.

Assumptions – Cityworks configuration will implemented in the current Round Rock environment. Key Round Rock staff will have full access to this environment for training and review.

Task 10: Configuration Review Meetings

The configuration team will conduct multiple (to be scheduled) in person and webinar review workshops of the Cityworks configuration to gather feedback from Round Rock departments. Review workshops will cover the admin configuration, workflows, fees, and integrations.

Round Rock Responsibility – Attend configuration review meetings.

Deliverables – Configuration meeting minutes and updated Cityworks Configuration Document and SD&C Plan.

Assumptions – Round Rock will ensure attendance by staff and provide review comments in a timely manner.

Task 11: Integrations

The concept of the enterprise system is to create interface points for systems to share appropriate information with other systems. Our team has extensive experience configuring software and systems leveraging Cityworks API's that include Service Request, Work Order, PLL API, Inspections and Metrics, Cityworks SDK, and existing interfaces for billing systems, and financial systems as well as others.

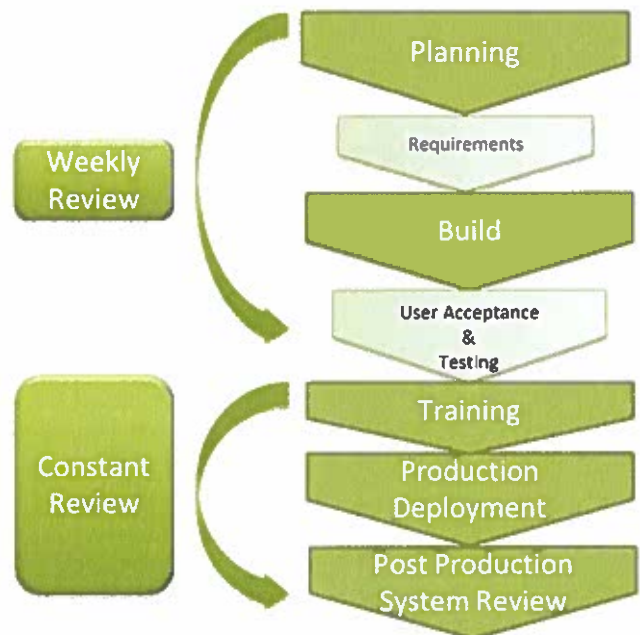
We understand Round Rock requires the following integrations:

- GIS – Including: ESRI (inherent, occurs "out of the box")
- Tyler MUNIS (City's ERP)
- Faster – Fleet Management
- SharePoint – electronic document management

The core Cityworks software configuration effort must have integration points established. This can occur previous to, or during the actual integration effort itself.

Timmons Group has developed and utilized a Modified Agile methodology to successfully implement many heterogeneous systems integrations/interfaces. Our methodology is comprised of five (5) primary steps. These steps are a result of our experience with business systems integration and help to ensure a smooth and reliable project lifecycle and production outcome.

The steps include Planning, Build, Training, Production Deployment, and Post-Production System Review. These steps ensure that we include everyone and every system of record in the development of detailed requirements for the design of the interface(s). Once the interfaces are developed, a rigorous testing plan will be executed. Upon successful completion of this User Acceptance Testing (UAT), the interfaces are ready for deployment. However, prior to the final production deployment, user training is performed for those impacted directly by the project.



- **Planning** – Our planning is comprised of a workshop(s) where we engage our clients and iteratively work through the reasons for the integration, what data needs to flow back and forth (or sometimes in one direction), and how best from a technical perspective of how to achieve this integration (developing requirements). We will then



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develop to these requirements, use cases/stories and design the necessary workflows that depict the transfer of data between systems. The workshop will typically result in the need to engage the target system vendor, either to procure items such as a database design/schema diagram up to and including engaging their assistance in designing and developing the integration itself. Some of this vendor interaction may have already been established for items such as CCTV, Pavement Management, etc. via a formal or informal business relationship with Cityworks. If it has not, our proposal will reflect the appropriate level of effort required in our estimation to achieving the necessary planning required to move to the next step, building the integration.

- **Build** – In the Build phase of our integration process we will develop sprints that are approximately 1 to 2 weeks in duration that iteratively reflect the use cases/stories and methodology developed during the previous Planning step. During these sprints our team will develop a *potentially deliverable component* of the integration. This may be something as basic as moving one data item back and forth successfully. Working within this accelerated timeframe, the team will be able to build only the most essential functionality. This methodology encourages the integration team (including client stakeholders) to prioritize the most essential features, focus on short-term goals, and gives our clients a tangible, empirically based view of progress. Because each integration may require multiple sprints, each iteration of work builds on the previous (incremental), often replacing/discarding some of the previous work as more is learned (iterative). During sprint execution the team develops code and automated tests simultaneously using techniques such as Test-Driven Development (TDD), pair programming and continuous integration. Utilizing an Agile approach minimizes handoffs and phases as well as testing. Because the testing of the integration is integrated within our development methodology, we need only provide formal testing in regard to an overall system and integration test within the development environment. Once the interfaces are developed, a testing plan will be executed. Upon successful completion of this User Acceptance Testing (UAT), the interfaces are ready for deployment. However, prior to the final production deployment, user training is performed for those impacted directly by the project.
- **Training** – Our team then works with the appropriate stakeholders to train them both at the end user level and also to train one or more stakeholders in how the integration was developed and the management requirements to keep the integration working correctly.
- **Production Deployment** – After the integration has been developed (and tested throughout the development) we move on to deploying the integration into your production environment.
- **Post-Production System Review** – Once the integration is in production we will work as a team with our client stakeholders to verify that the integration was successful against the requirements defined during the Planning step. Any identified problems will be addressed and corrected.

The following JavaScript Object Notation (JSON) web services are available for the Cityworks platform:

Attachments	Entity	Preferences
Authentication	Equipment	Public Access
Bookmark	Equipment Cost	Reading
Case Asset	Event Layers	Recent Activity
Case Child Object	Fee Setup	Relates
Case Task Comments	General	Search
Case Task Results	GIS Search	Security
Crew	Holiday	Service Request
Condition	In Box	Storeroom
Codes	Inspection	Tasks
Contractor	Labor Cost	Types
Customer Call	Material	Work Order
Employee	Material Cost	Work Order Template

The following APIs are available for the Cityworks platform:

Citizen Engagement	Metrics	Work Order, Extended
Document Management	Service Request	
Inspections	Work Order, Basic	



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A Software Development Kit (SDK) is also available to download and install. It contains some sample DLLS to use to make coding easier if developing in .NET. The JSON web services do not support Windows Authentication. A second site, running Forms Authentication, can be used for the web services if Windows Authentication also needs to run for the main Server site.

Round Rock Responsibility – Attend workflow definition meetings and review workflow diagram and application design document.

Deliverables – Workflow Diagram and Application Design Document

Assumptions – Round Rock will provide a conference room appropriately sized for the number of participants and review all documentation in a timely manner.

Scope notes for integrations:

- 1) Tyler MUNIS – integration will be Fixed Fee per proposal costs. Integration to achieve movement of financial information collected within Cityworks moved to MUNIS and/or from MUNIS to Cityworks (GL code data only).
- 2) Faster - integration will be Fixed Fee per proposal costs. Integration to achieve movement of financial information collected within Cityworks moved to Faster and/or from Faster to Cityworks
- 3) SharePoint – integration will be based on time & Materials with a Not to Exceed fee of \$15,000.

Task 12: Data Migration/Conversion

One of the key objectives of Round Rock is to migrate legacy TrackIT data, to Cityworks PLL. It is our recommendation that we work with Round Rock to explore the value gained by doing the data conversion vs. the cost and effort required to do so. Round Rock has existing systems in place to access this data, we will work with Round Rock to determine if:

- a) This data is accessed regularly enough to merit the costs of a migration
- b) Will having access to the data via the legacy system remain a viable option

Upon completing this analysis if it is determined that the data migration should indeed occur, we will work with Round Rock to develop a process to ensure the migration is complete. Inherent to that process is establishing a strategy to deal with the data that is being managed in what will become a legacy system. This task specifically addresses the datasets and systems that are slated for conversion into the proposed Cityworks solution.

Data Migration Approach

The legacy datasets and systems targeted for conversion possibly span multiple database schemas, database versions and even database formats, which implies that each will be handled in a unique way. While this is true in many ways, the fundamental approach to successfully migrating data from one system to the other is, in fact, the same.

Coordination

As is evident by this proposal, the migration effort is just one facet of the system implementation and cannot be undertaken independently. The foundation of the proposed Cityworks solution needs to be in place in order for the data migration to be performed, but even then, the conversion may drive specific configuration items and changes. Coordination and communication between the project team members will be an ongoing element of the conversion process that starts with project kickoff and terminates with a successful migration of all data into the production environment.

Orientation Workshop

The conversion process of each legacy system will include a workshop wherein the proposed project team will meet with appropriate Round Rock staff to review the specific implementations. The discussions will allow the project team to gain an understanding of how the applications are being used, what data has been recorded. At the same time, details associated with the data required as part of the conversion process will be reviewed, documented and approved.

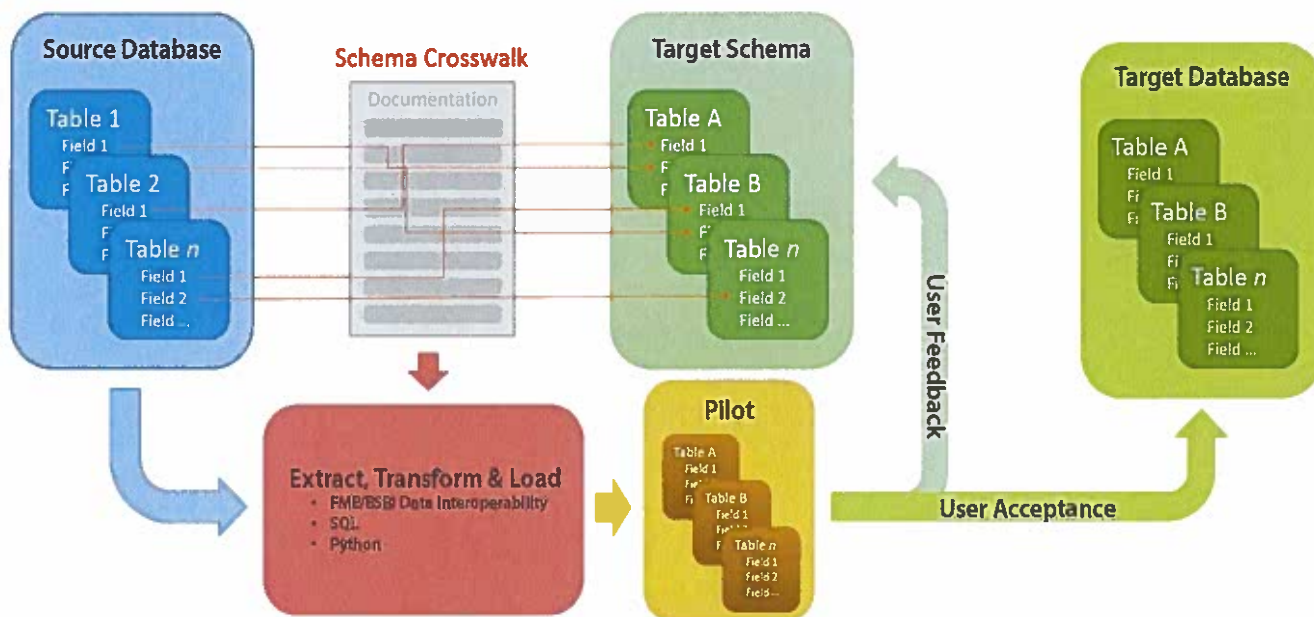
During the workshops, the project team will also initiate the process of gaining access to the underlying database and will work with Round Rock staff to gather any available documentation (i.e., system specifications, entity relationship diagrams, etc.) specific to the software and specific versions being reviewed. This information will help to streamline the subsequent navigation and interpretation that will be necessary to perform the migration.

Database Schema Crosswalk

Perhaps the most critical task in a data conversion effort is performing a crosswalk of the source and target schemas to identify and document how various objects between the two systems are related, resulting in a documented "data map" that will guide the migration process.

Software and Implementation Services for Community Development System City of Round Rock, TX

While some of the source systems are well known commercial software packages, the software companies do not typically make database diagrams and workflows publicly available. Data structure even within commercial systems can vary across versions and, more importantly, each implementation can be setup differently based on workflow or data requirements. More data and custom solutions may have an even wider range or completely unknown schema. As such, the discussions and documentation resulting from the workshops will be critical to the completion of a highly detailed system crosswalk. Throughout the process, additional Round Rock input or clarification may be solicited as needed and is vital to ensuring that the resulting data mapping will reflect an accurate foundation for all subsequent activities.



Translation Scripting

Following the schema crosswalks, the project team will develop a series of processes to facilitate the actual migration of the source system data into Cityworks. Depending on the complexity and volume of the source data, the process may be a mix of manual and a scripted solution but will be established in a manner to ensure repeatability. The scripted solutions will be tailored to each specific data conversion effort and may range from native SQL Server scripts to third party migration tools but will ultimately follow a pattern referred to as extract, transform and load (ETL). The ETL approach is common within the GIS industry, but applies much more generically to moving data between systems. The ETL process will be designed as a one-time process that will result in data migrated into a development Cityworks database.

NOTE: (1) The project team will be performing a data translation but will not be completing any data generation as part of this process. (2) While the scripts are being developed and data is being translated into development, Round Rock departments can use the source systems as always. At the time the data is ready for production conversion, the source systems will need to be taken offline or transitioned into a read only state.

Multi-Staged Execution

Once the scripts are developed, the project team will test our methodology through a 3-stage process. This process is designed so that after the first data migration run (Draft) we will meet with Round Rock to review the data, note issues and errors, edit our scripts and process, and then repeat the process. The 3 stages will be:

- 1) Draft Data Migration
- 2) Pre-Final Data Migration
- 3) Final Data Migration

Although the details underlying each conversion may vary substantially, automation is assumed based on the volume indicated by Round Rock within the RFP. As part of the process, the project team will be analyzing and evaluating the output to identify potential anomalies that are not sufficiently systematic to be detected or trapped by the scripts. The approach to addressing those anomalies will be documented and discussed with Round Rock.



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Validation & Quality Control

With the conversion process completed against a subset of the data, the project team will perform a series of validation and quality control processes to verify a successful migration. This task will largely focus on back-end analytics that compare data in both the source and target systems but will also consist of front-end testing prior to release to Round Rock for testing. Results from this quality control process will be documented and shared with Round Rock.

Acceptance Testing

In contrast with the validation and quality control phase, which is based on a review by the project team, the acceptance testing phase offers Round Rock staff the opportunity to review the data within the context of the proposed Cityworks system in contrast with the information contained in the source systems. The acceptance testing places more emphasis on the front-end testing, wherein users will interact with, interrogate, and visualize data through the Cityworks interface. Feedback will be incorporated into a revision process that will guide modifications to the scripts and processes that initially drove the conversion.

Upon completion of the testing process and acceptance by Round Rock, the project team will prepare for the production conversion, which will coincide with the release of the proposed system and the retirement of the legacy solutions.

Production Conversion

The production conversion effort will encompass the migration of the full data sets from each of the source systems into Cityworks. The processes established through the crosswalk and encapsulated in the refined translation scripts will be executed as part of the production release management process. The conversion team will coordinate with the Round Rock to transition the source systems into a static state to ensure that no further data entry occurs that could result in data loss. The automated aspects of the conversion will be applied followed by any documented manual processes that are required to address data anomalies.

The production conversion will wrap-up with a coordinated, but truncated, validation sufficient to verify a successful data migration. Based on the preceding step-wise approach with multiple points of quality control and an ongoing feedback loop, the final conversion process is anticipated to adhere to the expectations of the project team and Round Rock and will result in a more consolidated system with centralized access to a wealth of historic information.

Round Rock Responsibility – Gather information for data migration requirements (8-16 FTE Hours). Additional meetings as required (approximately 16 FTE Hours per participant).

Deliverables – Orientation Workshop, Database Crosswalk Schema Document/Data Conversion Plan & Migrated Data

Assumptions – Existing data is attached or references a uniquely identified asset, this can be referenced to a unique asset within GIS. Round Rock will provide a conference room appropriately sized for the number of participants and review all documentation in a timely manner.

Task 13: Migrate the Cityworks PLL Environment

Our configuration team will work with Round Rock IT staff to configure the Cityworks PLL software at Round Rock's facilities and migrate the Cityworks configuration from the development environment to the test environment. Our configuration team will work directly with Round Rock's Project Manager to verify that all core system components (servers, clients, RDBMS, networking devices, and supporting software programs) are installed and appropriately configured. Our configuration staff will be onsite to facilitate Cityworks software installation, set-up, and configuration.

Round Rock Responsibility – Software and hardware for Cityworks installation and configuration. Software should already be setup from prior AMS project, so task will be on running scripts for PLL configuration.

Deliverables – Cityworks configuration files migrated from the Timmons Group cloud (test) environment.

Assumptions – Round Rock IT will ensure that software, hardware, and network connectivity meets Cityworks implementation specifications and specified in the Core System Design Plan. Round Rock IT staff will be available to assist our configuration team during Cityworks installation.

Task 14: Develop Testing and Acceptance Plan

The configuration team will work with Round Rock to develop and administer a Testing and Acceptance Plan. Testing and Acceptance Plan objectives shall remain consistent with the application functionality detailed in the System Design and Configuration Plan (consisting of the workflows laid out during the configuration workshops). The Testing and Acceptance

Software and Implementation Services for Community Development System City of Round Rock, TX

Plan shall address, in sufficient detail (as collectively deemed by Round Rock and the configuration team) the elements required to support Round Rock's testing of the Cityworks software functionality and database configuration, security matrix, documentation of application performance issues/errors experienced during the testing, documentation of the resolutions to noted issues/errors, and certification and acceptance of the final deliverable database configuration and software functionality. Additionally, the testing would also include the movement of data and workflows between Cityworks Server AMS and PLL as laid out in the configuration workshops.

The test server and final production server environments will be measured against the results of the testing performed in accordance with this Testing and Acceptance Plan, and it is the baseline to which the scoped projects tasks will adhere. The Testing and Acceptance Plan shall be subject to the review and acceptance as to its reasonableness for its intended effort, which is defined herein as the ability to support the logical and thorough testing of the Cityworks application functionality, platform stability, and database configurations.

Upon completion of development of the Testing and Acceptance Plan, the Team shall submit said plan to the Round Rock for review and approval. It is important for Round Rock staff review the draft plan for technical accuracy and completeness. Our configuration team will update the Draft Testing and Acceptance Plan, incorporating Round Rock's comments and re-submit said plan as Final.

Round Rock Responsibility – Assist in development and review of the Testing and Acceptance Plan

Deliverables – Testing and Acceptance Plan drafts and final.

Assumptions – Round Rock will review all documentation in a timely manner.

Task 15: Setup Letter Templates

The goal of this task is to spend four (4) weeks configuring letter templates for City customers, in support of Cityworks PLL implementation (120 hours have been allocated). An additional one (1) week will be used for additional print items that include permit cards, CO's, and notice of violations as examples. These reports will be developed offsite in Crystal Reports. Cityworks Server PLL also supports the creation of SRS reports if the Round Rock so desires.

Round Rock Responsibility – Round Rock will review and comment on reports developed for this task.

Deliverables – Crystal or SRS reports in PLL

Assumptions – Reports will be developed in Crystal or SRS format. 120 hours to develop the reports have been allocated. If the number of letters and or effort to complete varies from this estimate the project budget can be adjusted to accommodate the change of scope.

Task 16: Knowledge Transfer/Onsite Training

During each onsite meeting (kickoff, workshops, configuration review, etc.) our configuration team consistently exposes Round Rock staff to Cityworks PLL that includes the Inbox, Case Data, and Case Workflows within the software. This does not replace but augments the training performed after final configuration. Onsite training will consist of two (2) one-week blocks of training that includes both Administration and User training specific the departments involved with this project.

Our configuration team, in conjunction with the City's Project Manager and key stake holders, will devise a Training Plan specific to your environment and data. A pro-active Training Plan will ensure that Round Rock staff are equipped to undertake the system utilization and maintenance tasks immediately upon receipt of the system.

The Training Plan will include:

- Product training curriculum descriptions
- Listing of Instructors
- Training Materials
- Schedule

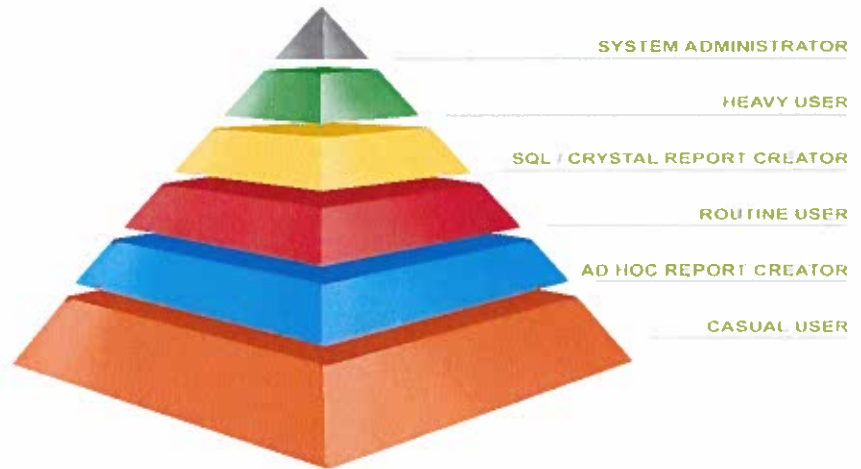
It is assumed that the Round Rock will provide the training facility including computers and a high-resolution computer screen projector. Coming into training, the users will need to possess basic functional knowledge of Personal Computers and Windows.

Software and Implementation Services for Community Development System City of Round Rock, TX

Round Rock Responsibility – Round Rock Project Manager will assist our configuration team in the creation of a comprehensive Training Plan that meets Round Rock's needs with minimal disruption of daily operations.

Deliverables – Training Plan and Training Documentation.

Assumptions – Round Rock will provide a conference or training room appropriately sized for the number of participants. Round Rock will ensure attendance by identified staff. All Round Rock staff attending training should have basic functional knowledge of computers and the windows operating system.



Sample Cityworks PLL Training Plan Overview:

Training Module	Course Description	Duration	User Group Level	Course Prerequisites
Introduction to Cityworks	Cityworks® Introduction. Course is designed to give an overview of Cityworks functionality from an end user's point of view. Users will learn basic operations within ArcMap, the Cityworks toolbar and functions, along with the creation of Service Requests and Event Layers.	Ongoing during Workshops and Configuration Reviews	Casual Group Users	N/A
Cityworks Report Creating and Writing	Cityworks® Reporting with SQL. Expose students to the Cityworks Report Engine to produce concise summary reports including Ad Hoc Reports, Predefined Reports, and Budget Reports. Cover SQL Reports basics; becoming familiar with the tool bars and basic functionality. Students will work hands-on to create basic SQL reports.	4 hours each class	Ad Hoc Report Creator and SQL Report Writer	N/A
Permits	Cityworks® Permitting. The course will cover user management, permit/case/license template configuration, workflow setup, fee configuration, custom case data fields, and basic reporting using Crystal Reports. Throughout the course, training staff will share example workflows and data from existing clients, as well as best business practices in Cityworks PLL configuration.	8 hours each class	Routine and Heavy Users	Intro to Cityworks
Designer and System Administration	Cityworks® Designer and System Administration Covers system and database administration issues such as software installation, user accounts, security, code table creation, work order and service request templates and resource (labor, material, equipment) hierarchies, table creation, and permits. Includes a review for GIS personnel as well; covers items needed to successfully	8 hours each class	System Administrators	ArcGIS & Intro to Cityworks



Software and Implementation Services for Community Development System City of Round Rock, TX

manage the setup and maintenance of the GIS for Cityworks® use.

Task 17: Acceptance Testing

Prior to Go-live there will be a thirty (30) day acceptance testing period. During this period Round Rock will test the Cityworks implementation against the SD&C documentation and identify issues and opportunities and submit to the Timmons Group project management site. The Testing and Acceptance Plan will frame and guide Round Rock through the testing process. Desired changes or modifications to the system functionality that fall outside of the SD&C plan will not be addressed at this time.

Round Rock Responsibility – Round Rock Project Manager will work with staff to implement the Testing and Acceptance Plan.

Deliverables – Testing Plan, results, and modifications.

Assumptions – Round Rock will be prepared to work through the Testing and Acceptance Plan and complete within a thirty (30) day period.

Task 18: Final Product Configuration

Our implementation team will conduct the final product configuration based on the System Design and Configuration Plan and Testing and results of the acceptance testing. Our configuration team will provide documentation for the key aspects of this project and Cityworks components. Proposed documentation is summarized below:

Cityworks Configuration Document – Early on our configuration team with Round Rock's input developed a Cityworks Configuration document that is maintained through the life of the project

Project Management Plan – Our Team developed and maintained a project plan that included the scope of project services (and any changes), budget, schedule, risk management and communication approach.

Cityworks® Server PLL Software – Azteca provides standard documentation for the latest product release. Separate documentation is provided for system administration and end users.

System Design and Configuration (SD&C) Plan – Timmons Group will provide a copy of the plan resulting from the review, analysis and documentation of the organization and its current workflows, data sets, IT system and applications, system interface needs, output requirements, and public access and service request needs

Training Materials – Timmons Group will provide a copy of Round Rock and all training documents used during casual user, routine user, heavy user, ad-hoc reporting, management, and system administrator training. Timmons Group will also provide a User Guide for public portal users.

Testing and Acceptance Plan – Timmons Group will prepare and deliver a copy of the test plan and test results report to be used for system certification and acceptance by Round Rock.

Round Rock Responsibility – Acceptance of documentation.

Deliverables – All project documentation developed to date.

Assumptions – Round Rock will receive all documentation in digital format.

Task 19: Go-live and Project Close-out

Having successfully completed all system upgrades, testing/acceptance procedures, production environment initialization, and Go-live preparation tasks specified above, the system is deemed prepared for Go-live. At such time that end-user access has been configured/re-directed to the newly initialized production environment, the system is deemed to be in "Live" status. Round Rock Cityworks users will now be executing Permitting and Building Inspection tasks in a live configured Cityworks production environment. After five (5) days of initialization of the Production Environment, Round Rock shall generate a certificate signifying the Cityworks application functionality and database configuration is operational in a "Live" production capacity. Round Rock Project Manager shall sign said "Go-live Certificate" and submit it to Timmons Group.

Round Rock Responsibility – Provide configuration team with a certificate of "Live" production capacity.



Software and Implementation Services for Community Development System City of Round Rock, TX

Deliverables – Last minute configuration and document modifications. Three days (24 hours) of on-site Go Live support.

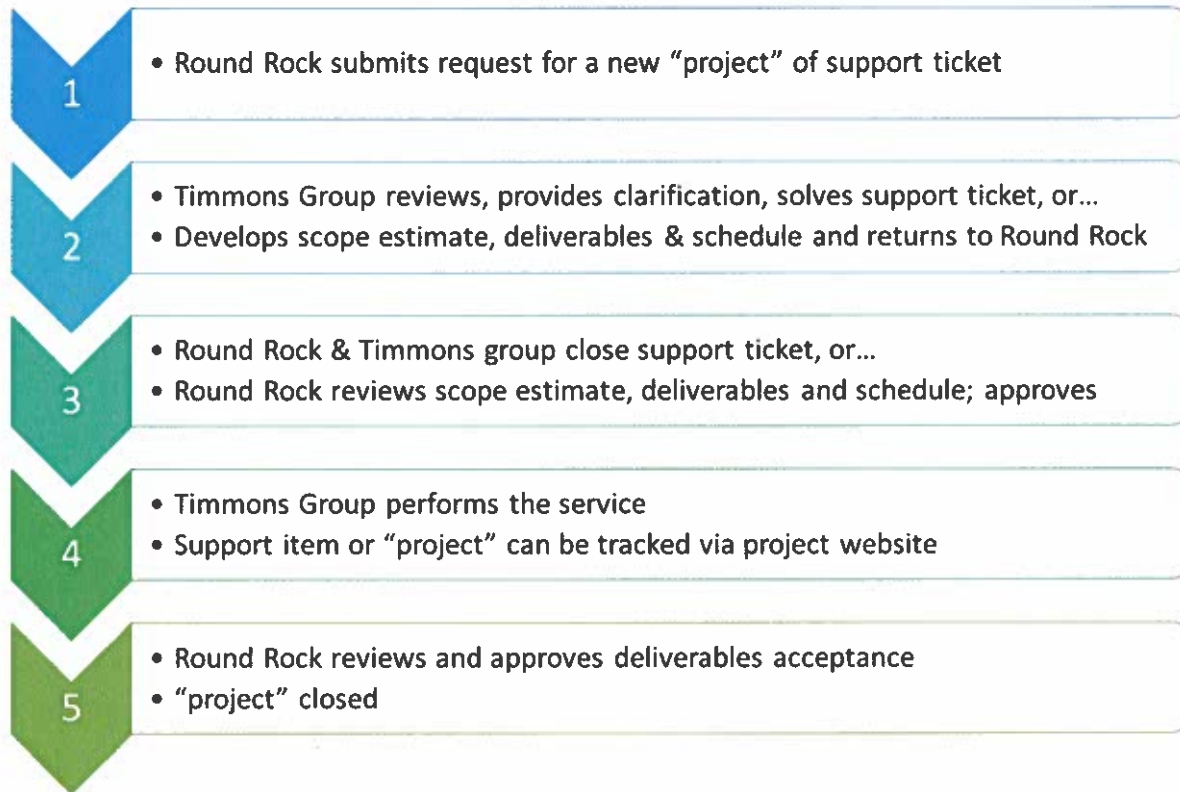
Assumptions – Work through the Timmons Group Help Desk to resolve and issues.

Task 20: Post Go-live Support

Once the system has been rolled out and is being used. Our configuration team will provide forty (40) hours of ad-hoc support to address any configuration, implementation, software installation or enterprise integration matters that may arise. For example, these might include the redesign of printout forms or changes in the content of the work management portion of the Cityworks database. Round Rock will have one (1) year after Go-live to utilize the remote support.

Optional long-term support – effort TBD

Timmons Group offers a long-term support contract to all of our Cityworks clients. We do this not because of expected problems but for unforeseen requests, desires to extend the scope of services, staff augmentation or a host of other reasons. We have a formalized process for submitting issues, requests etc. that is tracked by the same tool set that our client have access to during the implementation project, so they can monitor progress, etc. We prefer these tasks to be on a time and materials basis with an upset limit and we charge a flat rate of \$150/per hour for these services. Our support process is detailed in the diagram below:



Phase 2: Permitting & Land Development – Public Access Portal

Phase 2: Purpose and Objectives

This scope of work (SOW) details the development and implementation of the Timmons Group PLL Public Portal (Portal) for Cityworks Server® PLL for Round Rock (City).

Phase 2: Development and Go-Live Schedule

The table below lists a schedule of tasks for the deployment of the Portal. Timeframes will be reassessed once an agreement to the SOW is reached.

Task	Responsibility
------	----------------

Software and Implementation Services for Community Development System
City of Round Rock, TX

Final Review and Revision of Project Plan	Timmons Group/Round Rock
Deploy OOTB Portal to Test Environment	Timmons Group
Request User Interface Changes	Round Rock
Configure contractors in Cityworks for online access	Timmons Group /Round Rock
Complete configuration and integration of the Portal	Timmons Group
WebEx Training on Portal	Timmons Group
Deliver Public Portal User Guide	Timmons Group
Complete Testing	Timmons Group /Round Rock
Deploy Portal to Production	Timmons Group
System Stabilization	Timmons Group /Round Rock
Complete triage of testing feedback items	Timmons Group
Final System Acceptance	Round Rock
Transition to Vendor Support and As-Needed Timmons Group Support	Timmons Group /Round Rock

Phase 2 Task 1: Final Review and Revision of Project Plan

Round Rock and Timmons Group will review all the contents of this document via a formal kick-off. All details, timeframes, and responsibilities outlined within this document must be finalized and agreed upon first before proceeding any further with the project.

Phase 2 Task 2: Deploy Out of the Box (OOTB) Portal to Test Environment

Timmons Group will deploy the out-of-the-box Portal to Round Rock's test environment.

Phase 2 Task 3: Request User Interface Changes

Round Rock will request user interface changes to the Portal. Timmons Group will review requests with Round Rock and make updates to the Portal that do not deviate from functionality identified in "TG PLL Portal Core Functionality" table below. Timmons Group will make a maximum of 40 hours of interface customizations for the City.

Phase 2 Task 4: Configure Contractors in Cityworks for online access

Timmons Group will ensure that contractors are pre-configured for access on the portal before Go-Live.

Phase 2 Task 5: Complete Configuration of the Portal

Timmons Group will finalize configuration of the Portal

Phase 2 Task 6: WebEx Training on Portal

Timmons Group will conduct a Portal training over web meeting for Round Rock staff.

Phase 2 Task 7: Deliver Public Portal User Guide

Timmons Group will deliver a Portal User Guide.

Here are examples of videos on client sites providing the public with user instructions:

- Create Account – https://www.youtube.com/watch?v=JYSeomkOj_M
- Resetting a Password – <https://www.youtube.com/watch?v=JctmApqIECg>
- Creating an Application – <https://www.youtube.com/watch?v=MTHtC8SfGys>
- Permit Information – <https://www.youtube.com/watch?v=V7d328oEq3Q>

Phase 2 Task 8: Complete Testing

Round Rock and Timmons Group will complete testing of the Portal in preparation for Go-Live.

Phase 2 Task 9: Deploy Portal to Production

Timmons Group will deploy the Portal to Production for Go-Live.



Software and Implementation Services for Community Development System City of Round Rock, TX

Phase 2 Task 10: System Stabilization

Time should be allowed for the system to stabilize. This means that the Portal is complete in production and no additional changes are needed prior to go-live.

Phase 2 Task 11: Complete triage of testing feedback items

Last minute tweaks are addressed by Timmons Group before go-live. Tweaks should only fix items broken that are deemed critical for go-live. Significant requests will be delayed until post go-live and may result in a change order.

Phase 2 Task 12: Go-Live

Phase 2 Task 13: Final System Acceptance

Round Rock will formally sign-off and accept the Portal. At that time, the portal is ready for go-live.

Phase 2 Task 14: Transition to Vendor Support and As-Needed Timmons Group Support

Once Go-Live is complete, support will be handled by Timmons Group when identified by Round Rock. In some instances, support may be needed from Cityworks. Cityworks support is included in the Round Rock's licensing agreement with Cityworks.

Phase 2: Risks

The Portal is a dynamic web application that relies on many processes that are impacted by any number of variables. Timmons Group takes all efforts to eliminate risks:

1. Web Security
2. End User computer performance

Phase 2: Assumptions

Timmons Group assumes the following items throughout the development and implementation of the Portal.

1. Round Rock has the necessary IT infrastructure to support the Portal.
2. Round Rock has created an environment that is publicly accessible.
3. Round Rock will maintain the environmental requirements necessary for the operation of the Portal.
4. Round Rock will adequately test the Portal in a timely manner.
5. Round Rock will train and engage with public citizens on the use and functionality of the Portal.
6. Round Rock will engage in a support and maintenance contract with Timmons Group.
7. Any functionality requested that is not listed in Appendix A will be billed at a flat \$145.00 per hour.
8. Maintenance and Support does not include development of new functionality for the Portal.

Phase 2: Dependencies

The success of the Portal is dependent on the following:

1. Round Rock must have an active Cityworks license. The Portal relies on APIs licensed by Cityworks. Round Rock will need to purchase these APIs, including the PLL Public Access API, in order to use the Portal. This cost needs to be considered as you may not be currently licensed for the PLL Public Access API through Cityworks. This API cost is included in our bid proposal costs.
2. Round Rock must have and maintain GIS services to be used with the Portal.

Phase 2: Exclusions

The following are excluded from Timmons Group's scope of work:

1. Security related to other systems outside the Portal.
2. Consequential damages arising from the Portal implementation.
3. Responsibility for negligent acts by any parties outside of the control of Timmons Group.

Phase 2: Constraints

The following constraints may impede the Portal implementation:

1. Timmons Group did not develop the Cityworks APIs. Any bug found in the Cityworks API may delay development or impact functionality.
2. Timmons Group did not develop Cityworks PLL. Any bug found in Cityworks PLL may delay development or impact functionality.

Phase 2: TG PLL Portal Core Functionality

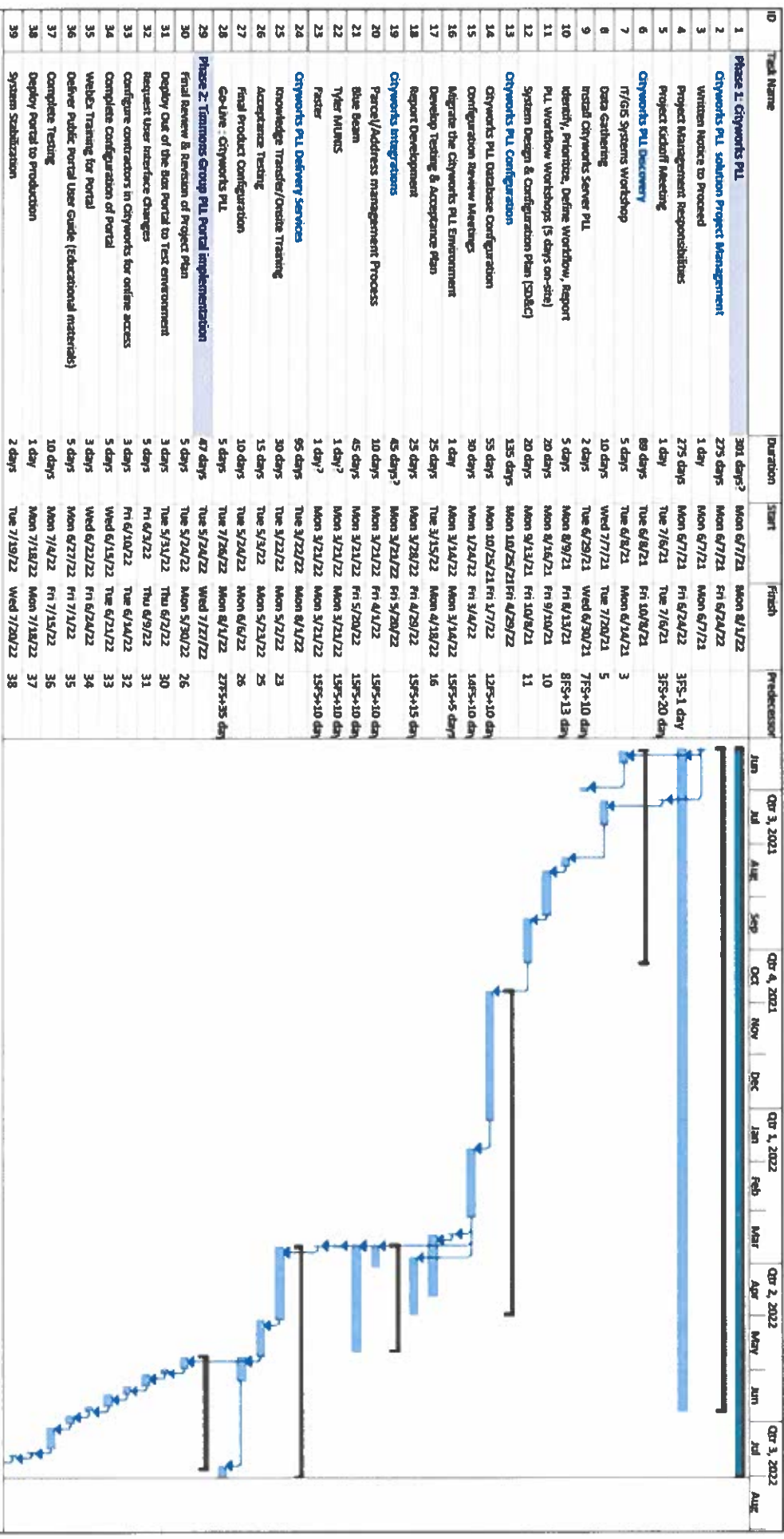
ID	Functionality	Functionality Definition
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Software and Implementation Services for Community Development System
City of Round Rock, TX

1	Account Creation, login and existing account check	The user can login to the Portal with a username and password. If the user does not have a username or password, they can create a new account. Guest Access does not require login credentials but limits functionality within the Portal.
2	Account Modification	The user can modify account information: email, address, phone number, security question, security answer.
3	View Permit Information	The user can view permit information: location, people, tasks, inspection requests, fees, and payments.
4	Schedule Inspection Request	The user can schedule inspection request on inspections where they are the contact, are in an open milestone and available.
5	Apply for a Permit	<p>The user can apply for a permit through the Portal. The user is given the option to apply for a child or standalone permit. A child permit will require a parent permit number to link. The user will be given the opportunity to submit the following information:</p> <ul style="list-style-type: none"> • Case Type • Location • People/Contacts • Contractors • Case Data • Attachments
6	View Job Summary	A crystal report defined by Client.
7	Permit Payment	The user will be given the option to pay permit fees with Paypal.(out of the box). Other payment systems can be easily integrated.
8	Permit Application and payment receipt printing	The user will be given the option to print the application/permit information. The user will be given the option to print a receipt after payment.
9	Required Fields	The user will be required to submit any case data items that are required within the configuration of Cityworks PLL.
10	Print Reports	The user will be given the option to print 2 custom reports identified by Round Rock.
11	Review Open/Incomplete	The user can view open permits where they are a contact. The user can view incomplete applications that they have started in the Portal but not yet configured.
12	Guest User Access	The user can access the portal as a Guest requiring no login credentials. Portal functionality is limited.
13	Disclaimer	The user will be shown a disclaimer and are required to accept the disclaimer before they may submit a permit.
14	search	The user can search for permit information by Permit Number, Name of people, contractor license number, Permit location or permit type.



PROPOSED PROJECT SCHEDULE



Round Rock
Enterprise Land Development Software System & Implementation
April 6, 2021

Task

Split

Summary

Project Summary

External Task

External Milestone

Inactive Task

Inactive Milestone

Project Summary

Manual Task

Duration-only

Manual Summary Rollup

Manual Summary

Start-only

Finish-only

Deadline

Progress

Manual Progress



Software and Implementation Services for Community Development System
City of Round Rock, TX

ID	Task Name	Duration	Start	Finish	Predecessor	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Qtr 1, 2022	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
40	Complete bridge of testing feedback items	3 days	Thu 7/23/22	Mon 7/25/22	39																
41	Go-Live : Timmons Group PUL Portal	1 day	Tue 7/26/22	Tue 7/26/22	40																
42	Final System Acceptance	1 day	Wed 7/27/22	Wed 7/27/22	41																

Task	External Task	Manual Task	Final-only
Split	External Milestone	Duration-only	Deadline
Milestone	Inactive Task	Manual Summary Rollup	Progress
Summary	Inactive Milestone	Manual Summary	Manual Progress
Project Summary	Inactive Summary	Start-only	

CITYWORKS PLL PRODUCT DESCRIPTION

Cityworks PLL streamlines and automates permit, licensing, and land management processes while working with Cityworks AMS and Esri® GIS. This allows you to view permit, license, and land data in the same application as work orders, service requests, and GIS asset data. Cityworks PLL and AMS records can also be linked together, which allows organizations to capitalize on the major applications of the Cityworks platform. Cityworks allows organizations to track permits, planning and development, engineering processes, business and regulatory processes, and code enforcement cases from inception to completion. GIS features can be tracked and may include parcels, street segments, intersections, addresses, or any other defined GIS feature classes. Most permits and applications span an array of departments, including building, planning, and engineering. Cityworks enables agencies to share and access information easily and efficiently, streamline the application and review process across departments, and deliver substantially higher levels of customer service for contractors and citizens. Cityworks tracks all addresses, personnel, conditions, tasks, inspections, corrections, fees, and payments for any given permit type, which can include:

- Building
- Electrical
- Mechanical
- Plumbing
- Demolition
- Right-of-way
- Utility cut
- Fire and zoning

PLL streamlines and automates work processes, including:

- Application routing
- Plan review
- Fee calculation and collection
- Licensing renewals
- Workflow and tasks
- Inspections
- Management signoff and tracking
- Reporting

Cityworks is designed with built-in apps (Office, Tablet, and others) and other apps built outside of the platform (including Respond, Public Access, and mobile apps for iOS and Android), which provide the end user with an optimized office or mobile experience using various devices. Office contains full PLL functionality and is designed for an office environment, while Tablet enables PLL management on mobile laptops and tablets. Both types of apps utilize a map that displays on a separate browser tab.

Permit, License, and Case Management

Cityworks gives jurisdictions direct control over their business processes. The basic structure of Cityworks PLL is highly adaptable and can be tailored to your organization's needs during the installation process. The basic PLL package can be configured to allow access by multiple departments, such as the legal department, encouraging coordination on code enforcement cases; or public utilities, allowing cooperation in the construction of water and sewer lines in new subdivisions.

Cases track transactional data required for community development and regulation processes, which can be configured to provide flexible business management. Automatic notifications can be used to alert users, departments, and divisions when their task in the workflow is ready to begin.

Methods are provided for accessing, searching, and editing case, task, and payment information. These include the use of the following forms:

- Case utility
- Payment manager
- Payment utility
- Task manager
- Task utility

Software and Implementation Services for Community Development System City of Round Rock, TX

The following functions are also available to create associated records:

- Link/relate to existing cases
- Create related child case
- Create related work order
- Create related service request

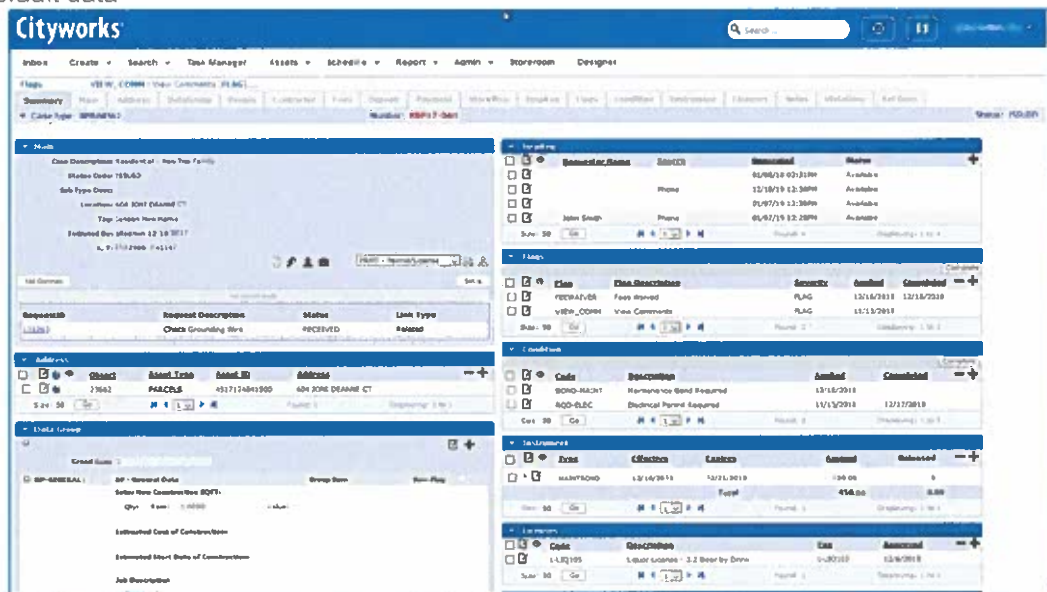
Customized templates help manage the required data for a specific process. As many templates as necessary can be designed to streamline the development process. Basic functional forms are available, which can be adapted to serve the organization's needs.

For example, if a residential building permit needs the Inspection Request form and the final subdivision plat doesn't, their templates are configured accordingly. Likewise, code enforcement cases need the Violations form; pre-development concept plans don't. Each template is assigned only those forms relative to that process.

Cityworks PLL core functions appear as tabs on the permit, license, or case document and contain panels listing appropriate data. These include:

Address	Flags*	Payment
Condition*	Inspection request	People*
Contractor	Instrument	Related documents
Data group*	Licenses	Summary
Deposit*	Main	Violations
Fees*	Notes	Workflow*

* Can include default data



Office for PLL—Summary tab

Map Interface

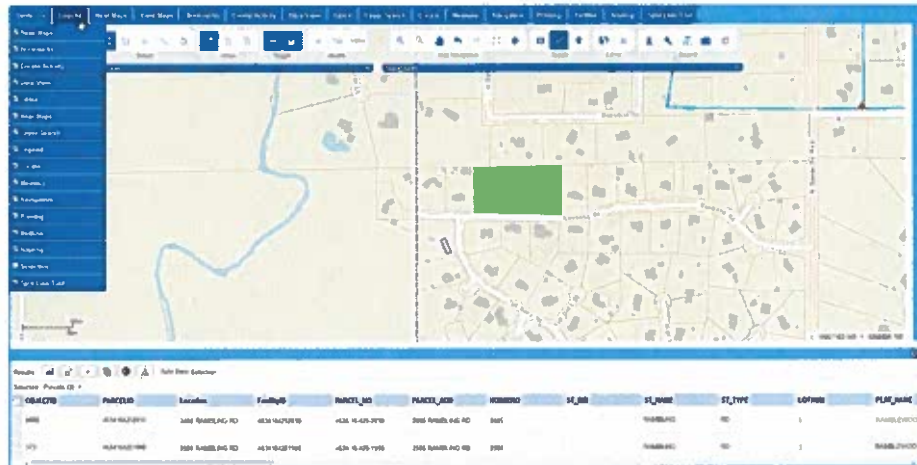
The web GIS-centric approach to Cityworks reduces the amount of land-data duplication common across city departments. The GIS is the source for land data in Cityworks. Users identify any asset and view information on parcels, zoning, surrounding areas, etc., so long as that layer is available in the GIS. All permits and cases associated with features or X, Y coordinates can be queried and displayed on the map. Combining the detail of the GIS with Cityworks items spatially results in spatial reports that quickly provide an organization with the information needed for decision making.

Using map tools enables users to locate addresses, select features, create activities (permits, service requests, work orders, and inspections), determine route navigation, as well as perform other map-related functions. Active work orders,

Software and Implementation Services for Community Development System City of Round Rock, TX

inspections, service requests, and cases are symbolized in the GIS map view, allowing for an intuitive summary of activities.

The map interface includes a Tools menu, with favorite menu items that can be anchored to the top of the map. Clicking the menu item opens that toolset. Favorite tools can be set and organized in Designer. Your favorites are saved and loaded each time you work with the map, and will be maintained across different browsers and devices.



Office for PLL—Map

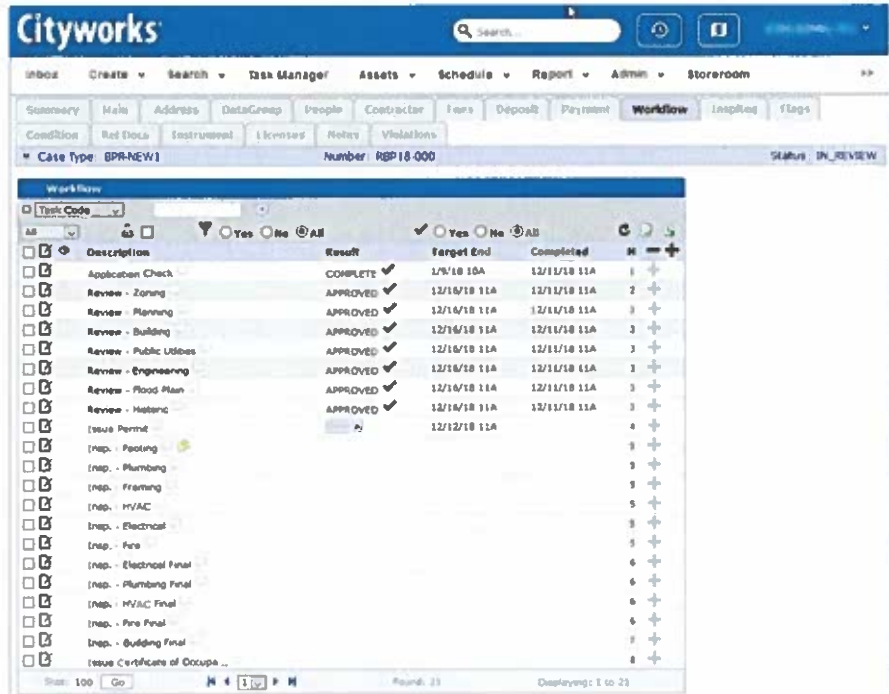
Map tools functionality includes the following:

- Base Maps—Change the base map.
- Bookmarks—Store frequently visited map extents.
- Create Activity—Enables creation of permits, service requests, inspections, and work orders from the map.
- Data View—View and modify records and attributes of features. Display, move, and edit events. View geodatabase attachments.
- Editor—Edit the map.
- Heat Maps—Display groupings of event layers on the map.
- Layer Search—Select features from a map layer or search for and select work activities.
- Legend—Manage event layers, set selectable layers, adjust asset visibility, control the transparency, and zoom out to the full extent of the layer.
- Locate—Locate work history in a specific location.
- Measure—Measure distance, location, or area on the map.
- Navigation—Navigate the map.
- Printing—Print the map.
- Redline—Draw on the map using a variety of graphics. Drawings can then be attached to service requests, work orders, or inspections.
- Routing—Add locations to the map to generate a route for navigation.
- Selection—Select assets on the map.
- Split Line Tool—Enables splitting a line and transferring the work order histories to one or both segments.

Workflow

The workflow consists of tasks associated to a case. Users can efficiently update all tasks assigned to a case from one place, moving the case to completion. Workflow tasks can consist of review, inspection, and hearing task types. Workflow functions include the ability to view, add, organize, and update tasks for a permit or case and move the permit or case through plan reviews, issuance, inspections, meetings, hearings, and so forth. Workflow tasks are assigned to templates by default; however, users can edit the workflow by adding or deleting tasks for each permit or case as needed.

Software and Implementation Services for Community Development System City of Round Rock, TX



Description	Result	Target End	Completed
Application Check	COMPLETE	12/16/18 11A	12/11/18 11A
Review - Zoning	APPROVED	12/16/18 11A	12/11/18 11A
Review - Planning	APPROVED	12/16/18 11A	12/11/18 11A
Review - Building	APPROVED	12/16/18 11A	12/11/18 11A
Review - Public Utilities	APPROVED	12/16/18 11A	12/11/18 11A
Review - Engineering	APPROVED	12/16/18 11A	12/11/18 11A
Review - Flood Plain	APPROVED	12/16/18 11A	12/11/18 11A
Review - Wetland	APPROVED	12/16/18 11A	12/11/18 11A
Issue Permit		12/12/18 11A	
Inspection - Pooling			
Inspection - Plumbing			
Inspection - Framing			
Inspection - HVAC			
Inspection - Electrical			
Inspection - Fire			
Inspection - Electrical Final			
Inspection - Plumbing Final			
Inspection - HVAC Final			
Inspection - Fire Final			
Inspection - Building Final			
Issue Certificate of Occupancy			

Office for PLL—Workflow tasks

The workflow is affected by actions performed on each task, such as:

- Close the permit or case.
- Update the status of the permit or case.
- Insert a new task or group of tasks.

Additional task functionality includes:

Attached checklists containing inspection steps, corrections, etc.

- o These are required to be completed for the task to be complete.
- o Each checklist item can be marked with appropriate codes and comments.

Notification emails sent when tasks become available, are assigned, or are completed.

Inbox setup for tasks.

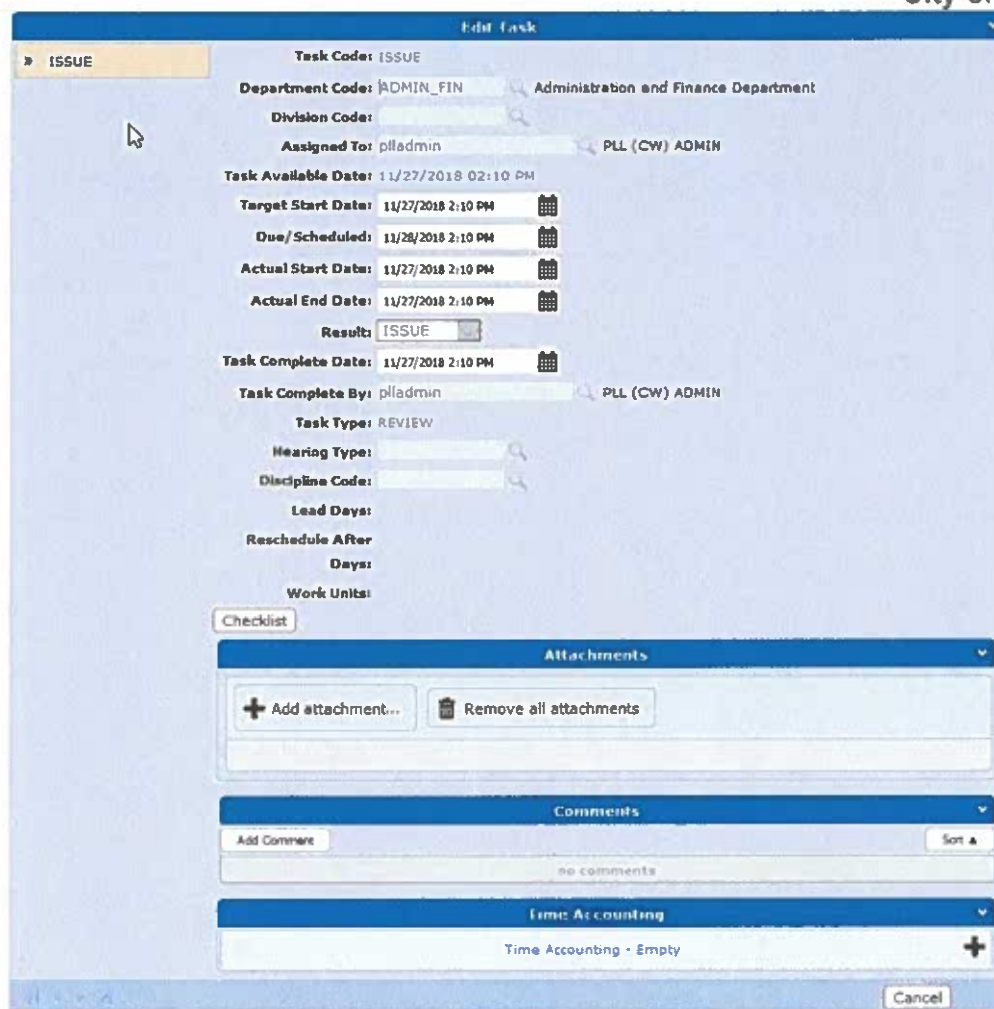
Inspection tasks:

- o Can be scheduled, canceled, rescheduled, or reassigned.
- o Corrections can be defined for checklist items.
- o From the Inspection Request tab, inspections can be added to the list of tasks in the workflow.

Hearing tasks:

- o Can be scheduled, canceled, or rescheduled.
- o Can be automatically scheduled if the hearing schedule is tracked in PLL.
- o Fields are available to store comments, time accounting, and corrections.

Software and Implementation Services for Community Development System City of Round Rock, TX



Edit Task

ISSUE

Task Code: ISSUE

Department Code: ADMIN_FIN Administration and Finance Department

Division Code:

Assigned To: plladmin PLL (CW) ADMIN

Task Available Date: 11/27/2018 02:10 PM

Target Start Date: 11/27/2018 2:10 PM

Due/ Scheduled: 11/28/2018 2:10 PM

Actual Start Date: 11/27/2018 2:10 PM

Actual End Date: 11/27/2018 2:10 PM

Result: ISSUE

Task Complete Date: 11/27/2018 2:10 PM

Task Complete By: plladmin PLL (CW) ADMIN

Task Type: REVIEW

Hearing Type:

Discipline Code:

Lead Days:

Reschedule After Days:

Work Units:

Checklist

Attachments

+ Add attachment... Remove all attachments

Comments

Add Comment Sort

no comments

Time Accounting

Time Accounting - Empty

Cancel

Office for PLL—Edit task

Case Utility

Case Utility provides an alternative method to access and edit case data listed in the workflow. Searches can be performed to find an existing case or a group of cases to update. Access to this tool can be provided by adding a custom URL to your site menu in Designer.

Software and Implementation Services for Community Development System City of Round Rock, TX

Case Utility

Number

Tag

Type

BPC-NEW

Type Description

Commercial - New Construction

Sub Type

Sub Type Description

Project Code

Project Description

Status

--Select--

Accepted Date

From:

To:

Public Access Cases

☐

Search

Clear

Select a Case to Update

<input type="checkbox"/>	Type	Sub Type	Tag	Number	Status
<input type="checkbox"/>	BPC-NEW		Jenson Lumber Yard	CBP18-007	IN_REVIEW
<input type="checkbox"/>	BPC-NEW		Heritage Warehouse	CBP18-009	IN_REVIEW
<input type="checkbox"/>	BPC-NEW		From-SR: Barking or Noisy Dog	CBP18-035	IN_REVIEW

Size: 10

Go

Found: 3

Displaying: 1 to 3

☐ Case Renumber

New Case Type

New Sub Type

New Case Number

☐ Use Next In Sequence
 ☐ Other
 ☐ None

☐ Change Case Status To

--Select--

☐ Remove Parent/Child Relationships

☐ Delete Case And Associated Data

Submit

Cancel

Tablet for PLL—Case Utility

Payment Manager

Payment Manager is an alternative method to access unpaid fees, deposits, or payment receipts found on a case. Payment Manager can be accessed when making a payment from the Payment panel (Summary or Payment tab). These search forms can be used to find a case or a group of cases by searching for unpaid fees, deposits, or payment receipts. Payments can be made with fees or applying deposit fees.

Software and Implementation Services for Community Development System
City of Round Rock, TX

Payment **Receipt**

Fees Search Form

Number: RBP18-039 Tag:

Type: Type Description:

Sub Type: Sub Type Description:

Project Code: Project Description:

Type: Business Name:

Status: --Select-- Fees Due: ☒ Start Date: End:

☒ Fees Payment ☐ Deposit Payment

<input type="checkbox"/>	Number	Type	Sub Type	Tag	Status
<input checked="" type="checkbox"/>	RBP18-039	BPR-DECK		Ivory Homes Lot 5	ISSUED

Fees

<input type="checkbox"/>	Fee Code	Fee Description	<input checked="" type="checkbox"/>	Amount	Paid	Amount Due
<input checked="" type="checkbox"/>	BLD-APPFEE	Building Permit Application Fee	<input type="checkbox"/>	60.00	0.00	60.00
<input checked="" type="checkbox"/>	BLD-ELCRMV	Electric Meter Removal Fee	<input type="checkbox"/>	200.00	0.00	200.00
Total				260.00		260.00

Found: 2 Displaying: 1 to 2

Size: 10 Found: 2 Displaying: 1 to 2

Total Amount Due: 260.00

Tablet for PLL—Search for payments in Payment Manager

Payment **Receipt**

Receipts Search Form

Ca Receipt ID:

Receipt File Name:

Receipt Date: From: To:

Amount Due: Min: Max:

Amount Paid: Min: Max:

Balance: Min: Max:

Number: Tag:

Type: Type Description:

Sub Type: Sub Type Description:

Status: ISSUED

Select	Receipt Date	Login ID	Receipt File Name	Amount Due	Amount Paid	Balance
<input checked="" type="radio"/>	2/7/2018	plladmin	KSM_Recpt6_7_2_2018_pila...	7,500.00	7,500.00	
<input type="radio"/>	7/25/2018	plladmin	KSM_Recpt7_25_7_2018_pil...	8,326.00	8,326.00	

Size: 10 Found: 2 Displaying: 1 to 2

Office for PLL—Search for receipts in Payment Manager

Payment Utility

Payment Utility is an alternative method to access payments related to a case. This tool can be used to find an existing case or a group of cases by identifying an associated payment.

Software and Implementation Services for Community Development System City of Round Rock, TX

Payment Utility

Number: Tag:

Type: BPR-DECK Type Description: Residential - Deck

Sub Type: Sub Type Description:

Project Code: Project Description:

Status: Accepted Date: From: To:

Public Access Cases: ☐

Select a Case to display the associated Payments

Type	Sub Type	Tag	Number	Status
BPR-DECK		Ivory Homes Lot 5	RBP18-039	ISSUED

Size: 10 Found: 1 Displaying: 1 to 1

<input type="checkbox"/> Tender	Description	Received	Paid
<input checked="" type="checkbox"/> CASH	Cash	plladmin	200.00
<input type="checkbox"/> CASH	Cash	plladmin	60.00
<input type="checkbox"/> CASH	Cash	plladmin	1240.00
<input type="checkbox"/> CHECK	Check	plladmin	934.00
<input type="checkbox"/> CHECK	Check	plladmin	166.00
<input type="checkbox"/> CREDITCARD	Credit Card	plladmin	1176.00
<input type="checkbox"/> CREDITCARD	Credit Card	plladmin	427.00

Size: 10 Found: 7 Displaying: 1 to 7

☐ Delete Selected Payments

Tablet for PLL—Payment Utility

Task Manager

Task Manager provides an alternative method to accessing and updating tasks listed in the workflow. Cases or groups of cases can be searched by date range, available/complete options, and task type (inspection, review, and hearing). The resultant tasks can be updated with corrections, comments, and time accounting. The case document can also be opened using this function, taking you to the summary of that case.

Task Manager

Inbox

Map

Recent

+ Create

Task Manager

User Menu

My Apps

Office

Tablet

Budgeting

Insights

My Apps

Respond

Issue Permit

DETAILS

COMMENTS

CORRECTIONS

TIME

REF DOCS

Assigned To: CMC ADMIN/PLL

Target Start Date: 12/11/2018 11:42 AM

Target End Date: 12/12/2018 11:42 AM

Actual Start Date

Actual End Date

Completed By: CMC ADMIN/PLL

Date Completed: 11/16/2018

INSPECTION HISTORY

RELATED ACTIVITIES

Imp. - Footing

DETAILS

COMMENTS

CORRECTIONS

TIME

REF DOCS

Imp. - Framing

DETAILS

COMMENTS

CORRECTIONS

TIME

REF DOCS

Imp. - Footing

DETAILS

COMMENTS

CORRECTIONS

TIME

REF DOCS

Respond—Task Manager

Software and Implementation Services for Community Development System City of Round Rock, TX

Task Utility

Task Utility is an alternative method to access and edit information listed in the workflow. Cases or groups of cases can be searched by a variety of fields. Cases matching the search criteria are displayed, as well as their associated tasks. Options are available to delete or re-open a task, delete the associated time accounting, or delete notes for those tasks.

Task Utility

Number

RBP17-039

Tag

Type

Type Description

Sub Type

Sub Type Description

Project Code

Project Description

Status

--Select--

Accepted Date

From:

To:

PublicAccess Cases

☐

Search

Clear

Select a Case to display the associated Tasks

Type	Sub Type	Tag	Number	Status
BPR-NEW1		Ivory Homes Lot 5	RBP17-039	ISSUED

Size: 10

Go

1

Found: 1

Displaying: 1 to 1

Task Code	Task Description	Result Code	Task Available	Target End	Completed Date
<input type="checkbox"/> APPCHECK	Application Check	COMPLETE	12/18/2017	12/19/2017	12/18/2017

Size: 1

Go

1

Found: 23

Displaying: 1 to 1

☐ Delete Selected Tasks

☐ Re-open Selected Task

☐ Delete Time Account Data

☐ Delete Notes Data

Submit

Clear

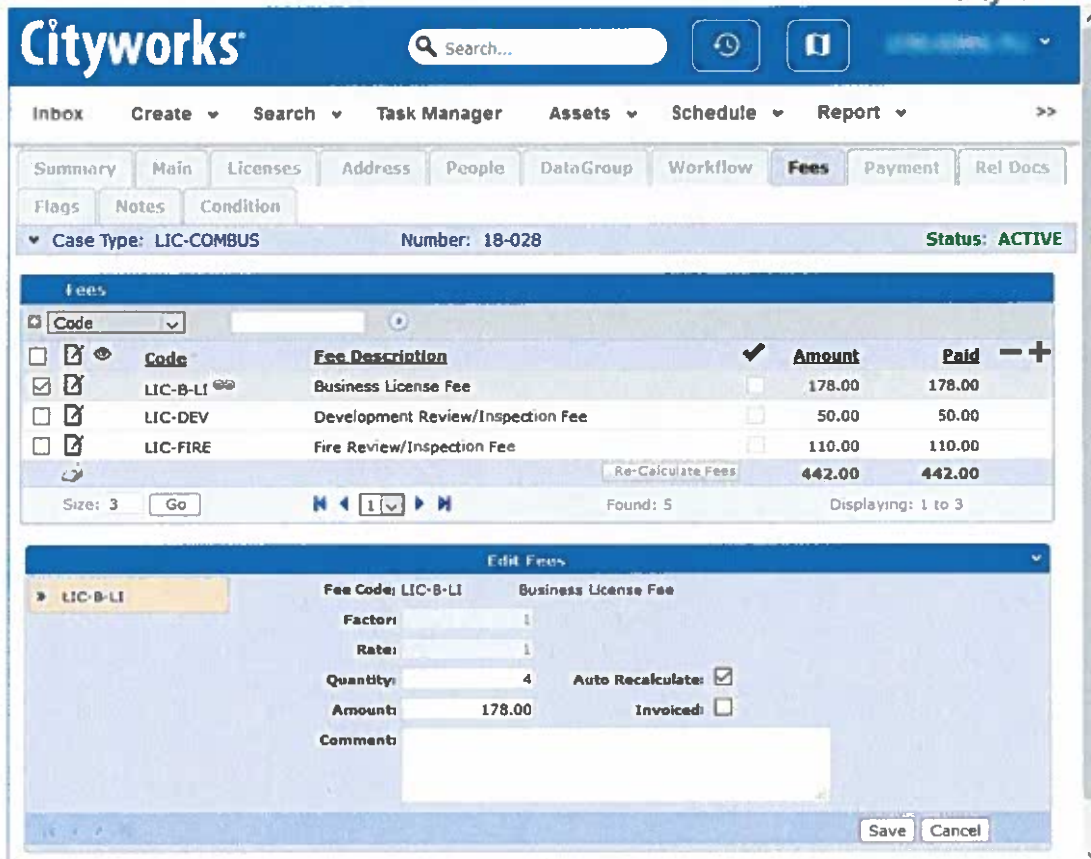
Office for PLL—Task Utility

Licenses

Cityworks tracks new licenses, renewals, fees, follow-up inspections, and related processes. A typical business license in Cityworks uses the same functions as other items in the system with the exception that it is designated as a business license.

Cityworks can handle licensing for various business and professional trade activities, which can include:

- Business licensing
- Trade licensing
- Health permits
- Fire permits
- Parking permits



Cityworks Search...

Inbox Create Search Task Manager Assets Schedule Report

Summary Main Licenses Address People DataGroup Workflow **Fees** Payment Rel Docs

Flags Notes Condition

Case Type: LIC-COMBUS Number: 18-028 Status: ACTIVE

Code	Fee Description	Amount	Paid
LIC-B-LI	Business License Fee	178.00	178.00
LIC-DEV	Development Review/Inspection Fee	50.00	50.00
LIC-FIRE	Fire Review/Inspection Fee	110.00	110.00
Re-Calculate Fees		442.00	442.00

Size: 3 Go Found: 5 Displaying: 1 to 3

Edit Fees

Fee Code: LIC-B-LI Business License Fee

Factor: 1

Rate: 1

Quantity: 4 Auto Recalculate: ☒

Amount: 178.00 Invoiced: ☐

Comment:

Save Cancel

Office for PLL—Business license example

License functionality supports the following:

Business licenses can have "sub-licenses" that expire on the same date as the primary business license. The sub-licenses have associated fees that are added and removed with the sub-license.

Licenses can expire on a given date, on a rolling year basis, or on a specific month or day.

Users can manually change the license status to renewal, or the system can perform this action automatically.

Historic licenses and year-to-year renewals for a given business are stored in the audit log.

Inspections

Inspections in Cityworks are handled as tasks and can be scheduled, canceled, rescheduled, or reassigned. Sub-inspections are handled as task corrections defining inspection steps or checklists.

The following is a variety of inspection supported by Cityworks that are related to the issuance of permits or code compliance:

Permits issued by the city, such as:

Building permit

Street cut permit

Food establishment inspections related to a fire operational permit

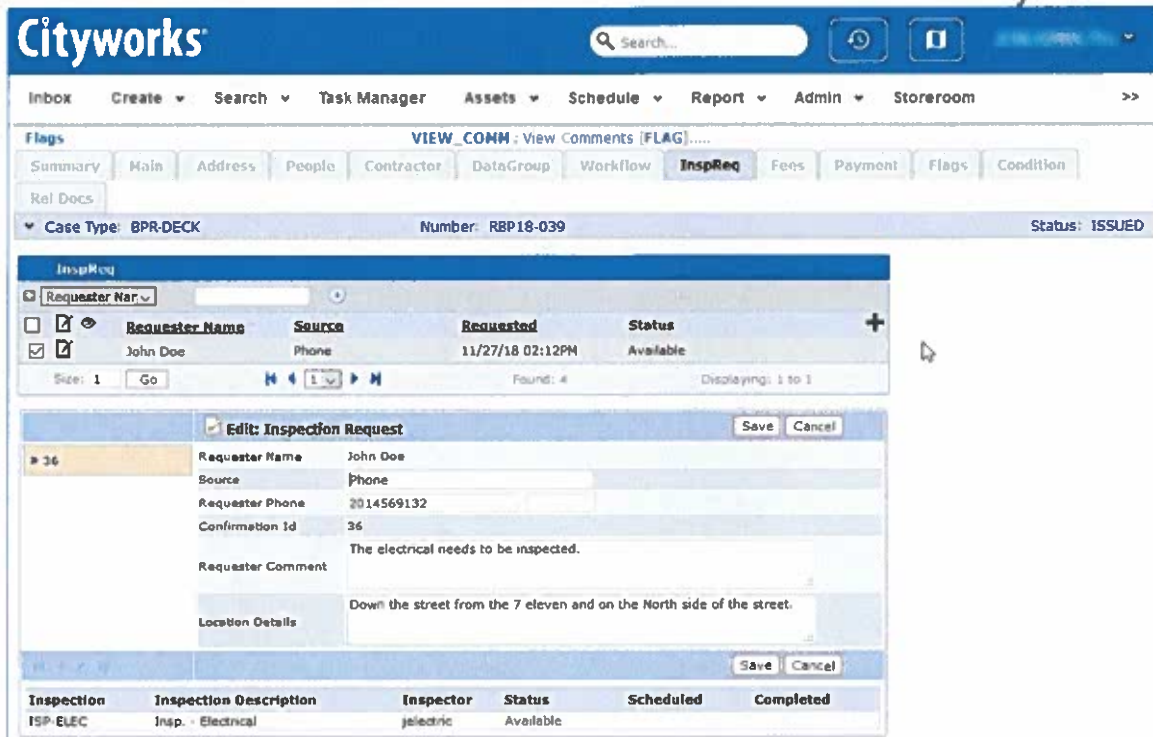
Construction and post construction site inspections

Code compliance inspections unrelated to current permits, such as:

Housing code violations

Tall weeds

Recurring inspections such as those related to businesses or food establishments



Cityworks Search...

Inbox Create Search Task Manager Assets Schedule Report Admin Storeroom >>

Flags VIEW_COMM: View Comments [FLAG].....

Summary Main Address People Contractor DataGroup Workflow **InspReq** Fees Payment Flags Condition

Rel Docs

Case Type: BPR-DECK Number: RBP18-039 Status: ISSUED

InspReq

Requester Name Source Requested Status

☒ John Doe Phone 11/27/18 02:12PM Available

Size: 1 Go Found: 4 Displaying: 1 to 1

Edit: Inspection Request Save Cancel

Requester Name John Doe

Source Phone

Requester Phone 2014569132

Confirmation Id 36

Requester Comment The electrical needs to be inspected.

Location Details Down the street from the 7 eleven and on the North side of the street.

Save Cancel

Inspection	Inspection Description	Inspector	Status	Scheduled	Completed
ISP-ELEC	Insp. - Electrical	jelectric	Available		

Office for PLL—Inspection request and edit panel

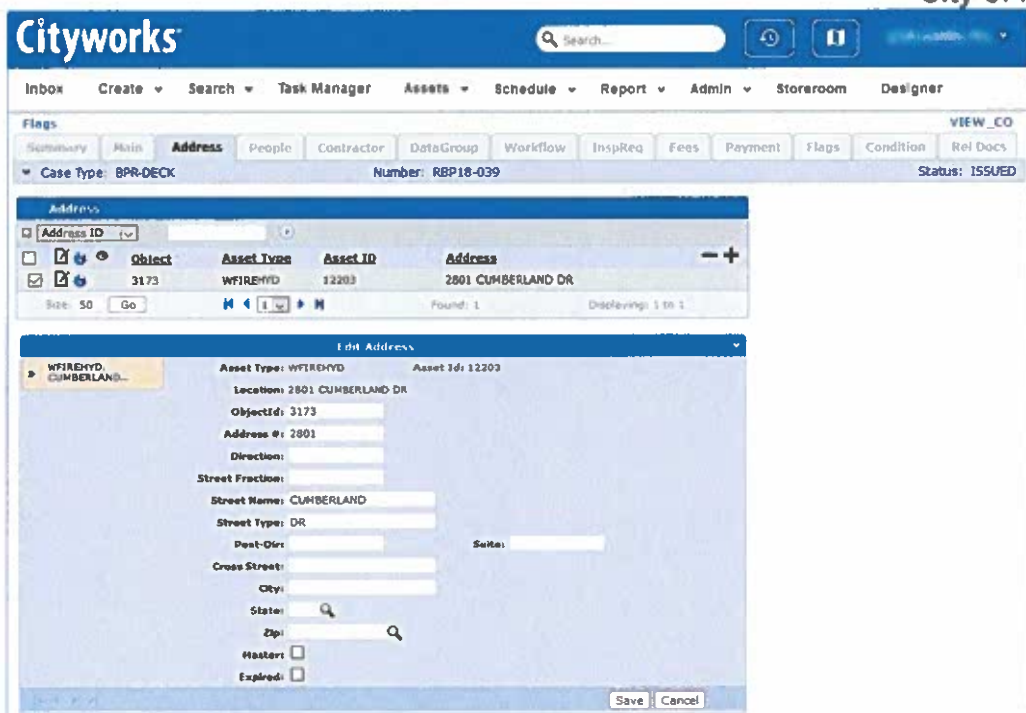
An inspection calendar is available through the workflow panel to display and schedule inspections. Display parameters include dates, times, inspector, and inspection description and code. Inspections can be scheduled using drag-and-drop selection of the task code onto the calendar. This function also includes an appointment interface allowing users to enter or modify the appointment details.

Address

The location data is displayed on each case. Cityworks is integrated with Esri GIS, relying on the geodatabase as the source for all land-related items on a given parcel. The parcel feature class is one of the primary feature classes utilized by Cityworks to track planning, permitting, and case activities. However, any GIS feature can be attached to a permit or case. Administrators can also define areas where cases can and cannot be created.

Default items such as the address, parcel ID, and X, Y coordinates are imported into the permit. The on-demand information from the map can easily be viewed and searched from within the application.

Software and Implementation Services for Community Development System City of Round Rock, TX



Cityworks Search... [Icons]

Inbox Create Search Task Manager Assets Schedule Report Admin Storeroom Designer

Flags: Summary Main **Address** People Contractor DataGroup Workflow InspReq Fees Payment Flags Condition Rel Docs

Case Type: BPR-DECK Number: RBP18-039 Status: ISSUED

Address

Address ID	Object	Asset Type	Asset ID	Address
3173	WFIREHYD	12203		2801 CUMBERLAND DR

Size: 50 Go Found: 1 Displaying: 1 to 1

Edit Address

Asset Type: WFTREHYD Asset ID: 12203

Location: 2801 CUMBERLAND DR

ObjectID: 3173

Address #: 2801

Direction:

Street Fraction:

Street Name: CUMBERLAND

Street Type: DR

Post-Dir:

Cross Street:

City:

State:

Zip:

Haster:

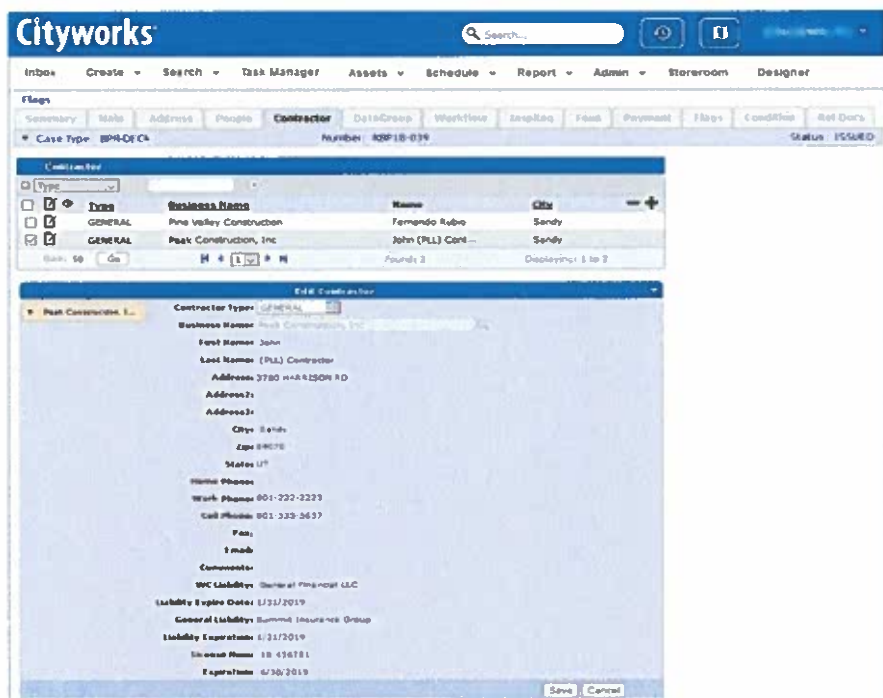
Expired:

Save Cancel

Office for PLL—Address example and edit panel

Contractor

Cityworks stores and maintains information about contractors who do business with the organization. Contractor registrations or licenses can be tracked using a variety of data and contractor accounts.



Cityworks Search... [Icons]

Inbox Create Search Task Manager Assets Schedule Report Admin Storeroom Designer

Flags: Summary Main Address People **Contractor** DataGroup Workflow InspReq Fees Payment Flags Condition Rel Docs

Case Type: BPR-DECK Number: RBP18-039 Status: ISSUED

Contractor

Type	Business Name	Name	City
GENERAL	Pine Valley Construction	Fernando Rubio	Sandy
GENERAL	Peak Construction, Inc	John (PLL) Contr...	Sandy

Size: 50 Go Found: 2 Displaying: 1 to 2

Edit Contractor

Contractor Type: GENERAL

Business Name: Peak Construction, Inc

First Name: John

Last Name: (PLL) Contractor

Address: 3780 HARRISON RD

Address2:

Address3:

City: Sandy

Zip: 76076

State: UT

Home Phone:

Work Phone: 801-222-2223

Cell Phone: 801-222-2637

Fax:

Email:

Comments:

WC Liability: General Liability LLC

Liability Expires Date: 1/31/2019

General Liability: General Insurance Group

Liability Expires Date: 1/31/2019

License Number: 18-456781

Expiration: 6/30/2019

Save Cancel

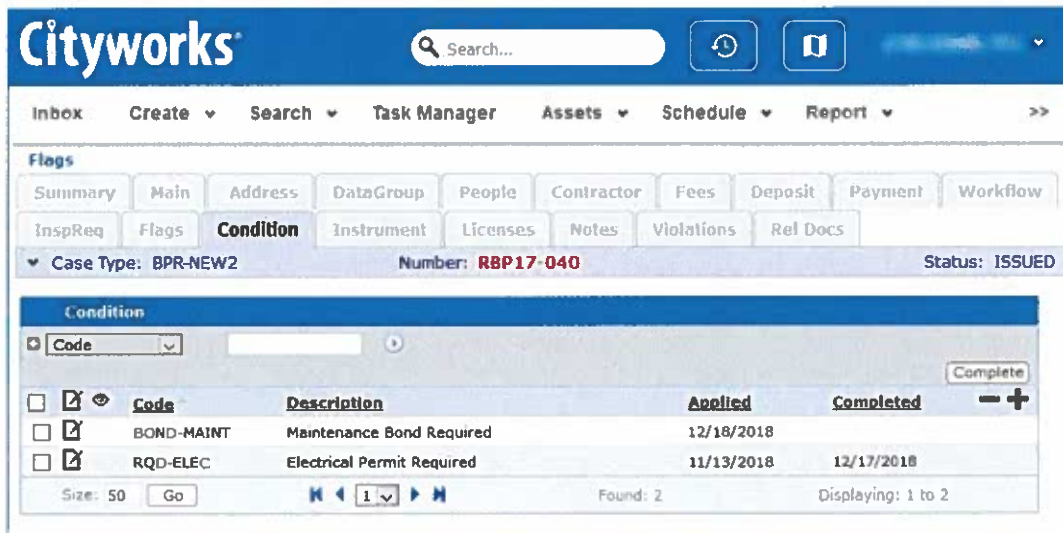
Office for PLL—Contractor example and edit panel

Software and Implementation Services for Community Development System City of Round Rock, TX

Condition

Conditions are used to track additional requirements as part of the case permit. A restriction can be put on the case if conditions are not met. For example, a permit cannot be issued until conditions are met, or a planning commission may approve an action item with conditions.

Conditions work outside of the workflow. While the workflow is typically used to track the tasks and workload of an organization's employees, conditions are often used to track extra tasks the applicant must complete to satisfy specific concerns, requirements, etc. Conditions can restrict case status changes to control phases of a project. For example, conditions A and B must be completed prior to issuing a permit, and conditions C and D must be completed prior to closing a permit.



Cityworks Search... [Refresh] [Home] [User]

Inbox Create Search Task Manager Assets Schedule Report >>

Flags Summary Main Address DataGroup People Contractor Fees Deposit Payment Workflow
InspReq Flags **Condition** Instrument Licenses Notes Violations Rel Docs

Case Type: BPR-NEW2 Number: **RBP17-040** Status: ISSUED

Condition

Code [Dropdown] [Add] [Complete]

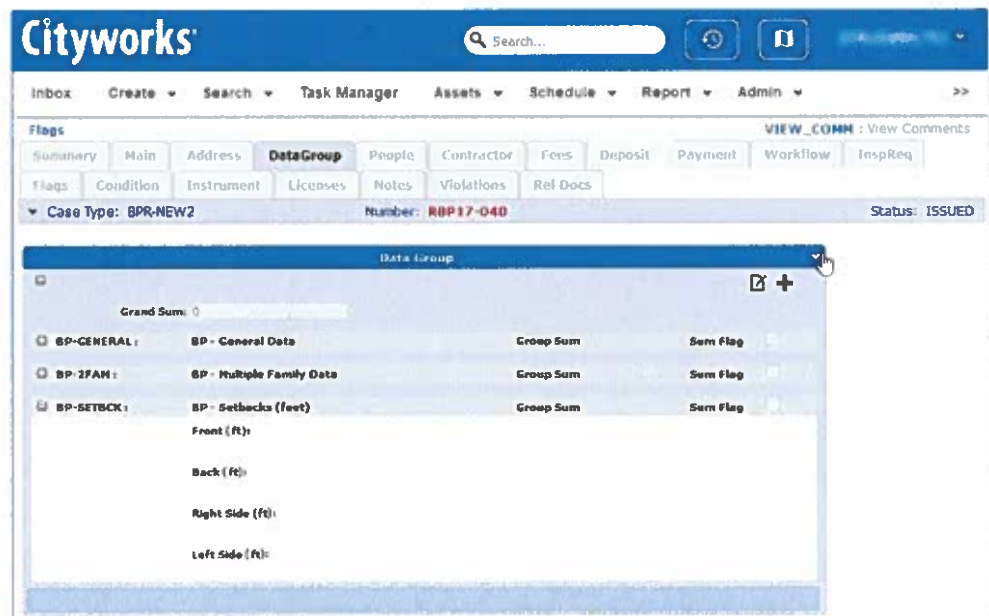
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Code	Description	Applied	Completed
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BOND-MAINT	Maintenance Bond Required	12/18/2018	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RQD-ELEC	Electrical Permit Required	11/13/2018	12/17/2018

Size: 50 Go [Page 1 of 1] Found: 2 Displaying: 1 to 2

Office for PLL—Condition examples

Data Group

Data Groups are used to collect information about the permit or case. Several data type formats are supported, including number, date, text box, comment box, yes/no, list of values, and predefined values.



Cityworks Search... [Refresh] [Home] [User]

Inbox Create Search Task Manager Assets Schedule Report Admin >>

Flags Summary Main Address **DataGroup** People Contractor Fees Deposit Payment Workflow InspReq
Flags Condition Instrument Licenses Notes Violations Rel Docs

Case Type: BPR-NEW2 Number: **RBP17-040** Status: ISSUED

Data Group [Add] [Edit]

Grand Sum: 0

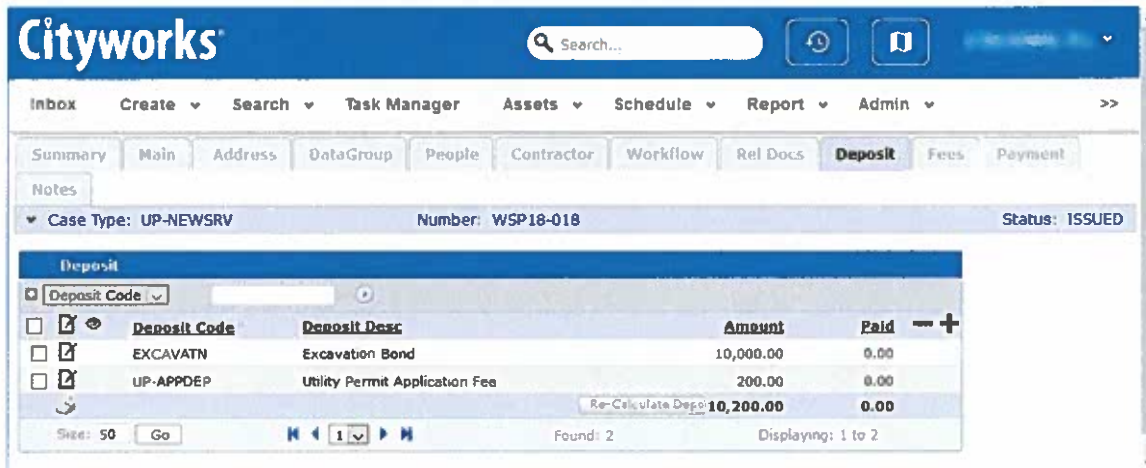
BP-GENERAL	BP-General Data	Group Sum	Sum Flag
BP-2FAM	BP-Multiple Family Data	Group Sum	Sum Flag
BP-SETBACK	BP-Setbacks (feet)	Group Sum	Sum Flag
	Front (ft):		
	Back (ft):		
	Right Side (ft):		
	Left Side (ft):		

Tablet for PLL—Data group examples

Software and Implementation Services for Community Development System City of Round Rock, TX

Deposit

Applicants may be required to make a deposit, and those deposits can be tracked as part of the permit or case. Deposits can then be applied to any fees related to the permit or case. This panel lists deposits associated with a case. Functions are available to add, edit, view, and refund deposits. And deposits can be calculated to a percentage of the total fees associated to the case.



Deposit Code	Deposit Desc	Amount	Paid
EXCAVATN	Excavation Bond	10,000.00	0.00
UP-APPDEP	Utility Permit Application Fee	200.00	0.00
Re-Calculate Depo		10,200.00	0.00

Office for PLL—Deposit examples

Fees

Fees can be collected as part of the case or permit. You can edit or waive existing fees or add new fees. The fee engine can be used to calculate even the most complex fee structures, including custom-built fees. Out of the box, Cityworks includes the following fee types:

- Flat fees
- Incremental fees
- Variable fees
- Linear fees
- Percentage fees
- Minimum fees
- Custom fees

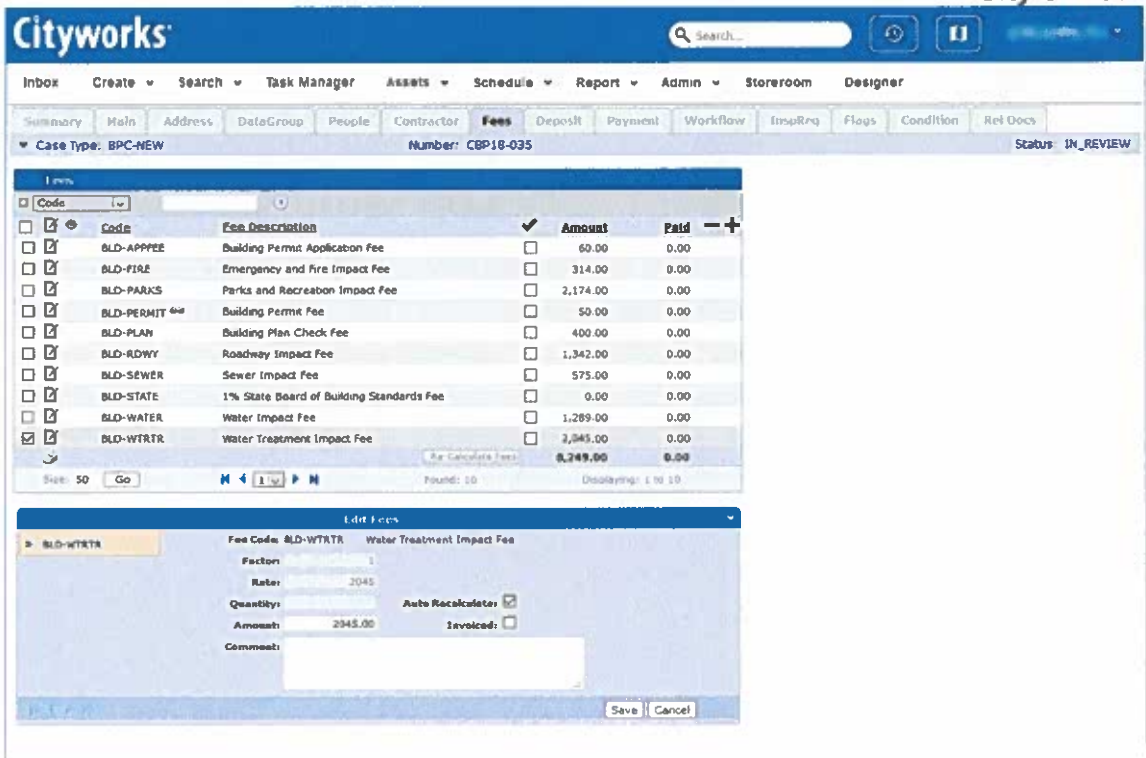
Case functionality can be automated based on fee activity, including the following:

- Fees can be automatically added to a case based on a task result.
- Fees can also be automatically removed from a case when it reaches a specific status.
- Cases can automatically progress to the next status once all the fees are paid.

Each fee code is assigned a type and then calculated as defined by the user and assigned to a template by default. Information in case data fields can be linked to a fee code for use in the calculation. Fee codes may include account numbers and can be overwritten by those with proper permission, be waived, or be assigned an effective date for the fee schedule.

A fee may be linked to violations whereby the fee is automatically associated and added to the fee structure for the case when a violation is issued. If the violation is deleted, the fee will be removed if no payment has been made.

Software and Implementation Services for Community Development System City of Round Rock, TX



Cityworks Search... [Clock] [Pause]

Inbox Create Search Task Manager Assets Schedule Report Admin Storeroom Designer

Summary Main Address DataGroup People Contractor **Fees** Deposit Payment Workflow InspReq Flags Condition Ret Docs

Case Type: BPC-NEW Number: CBP18-035 Status: IN_REVIEW

Code	Fee Description	Amount	Paid
<input checked="" type="checkbox"/> BLD-APPEE	Building Permit Application Fee	60.00	0.00
<input checked="" type="checkbox"/> BLD-FIRE	Emergency and Fire Impact Fee	314.00	0.00
<input checked="" type="checkbox"/> BLD-PARKS	Parks and Recreation Impact Fee	2,174.00	0.00
<input checked="" type="checkbox"/> BLD-PERMIT	Building Permit Fee	50.00	0.00
<input checked="" type="checkbox"/> BLD-PLAN	Building Plan Check Fee	400.00	0.00
<input checked="" type="checkbox"/> BLD-RDWAY	Roadway Impact Fee	1,342.00	0.00
<input checked="" type="checkbox"/> BLD-SEWER	Sewer Impact Fee	575.00	0.00
<input checked="" type="checkbox"/> BLD-STATE	1% State Board of Building Standards Fee	0.00	0.00
<input checked="" type="checkbox"/> BLD-WATER	Water Impact Fee	1,289.00	0.00
<input checked="" type="checkbox"/> BLD-WTRTR	Water Treatment Impact Fee	2,945.00	0.00
Total		8,249.00	0.00

Page: 50 Go [Navigation icons] Printed: 10 Displaying: 1 to 10

Edit Fees

Fee Code: BLD-WTRTR Water Treatment Impact Fee

Factor: 1

Rate: 2045

Quantity: 1

Amount: 2045.00

Auto Recalculate: ☒ Invoiced: ☐

Comments:

Save Cancel

Office for PLL—Fees example

Flags

Flags act as messages that scroll across the top of a permit as soon as it opens. They can also restrict the progress of a permit until the flag is completed. This means no one can schedule inspections, update tasks, take payments, etc., until the flag requirements have been completed.



Cityworks Search... [Clock] [Pause]

Inbox Create Search Task Manager Assets Schedule Report Admin Storeroom Designer

Flags FEEDWAIVER: Fees Waived [FLAG].....

Summary Main Address People Contractor DataGroup Workflow InspReq Fees Payment **Flags** Condition Ret Docs

Case Type: BPR-ELEC Number: RBP18-027 Status: IN_REVIEW

Main InspReq

Case Description: Residential - Electric

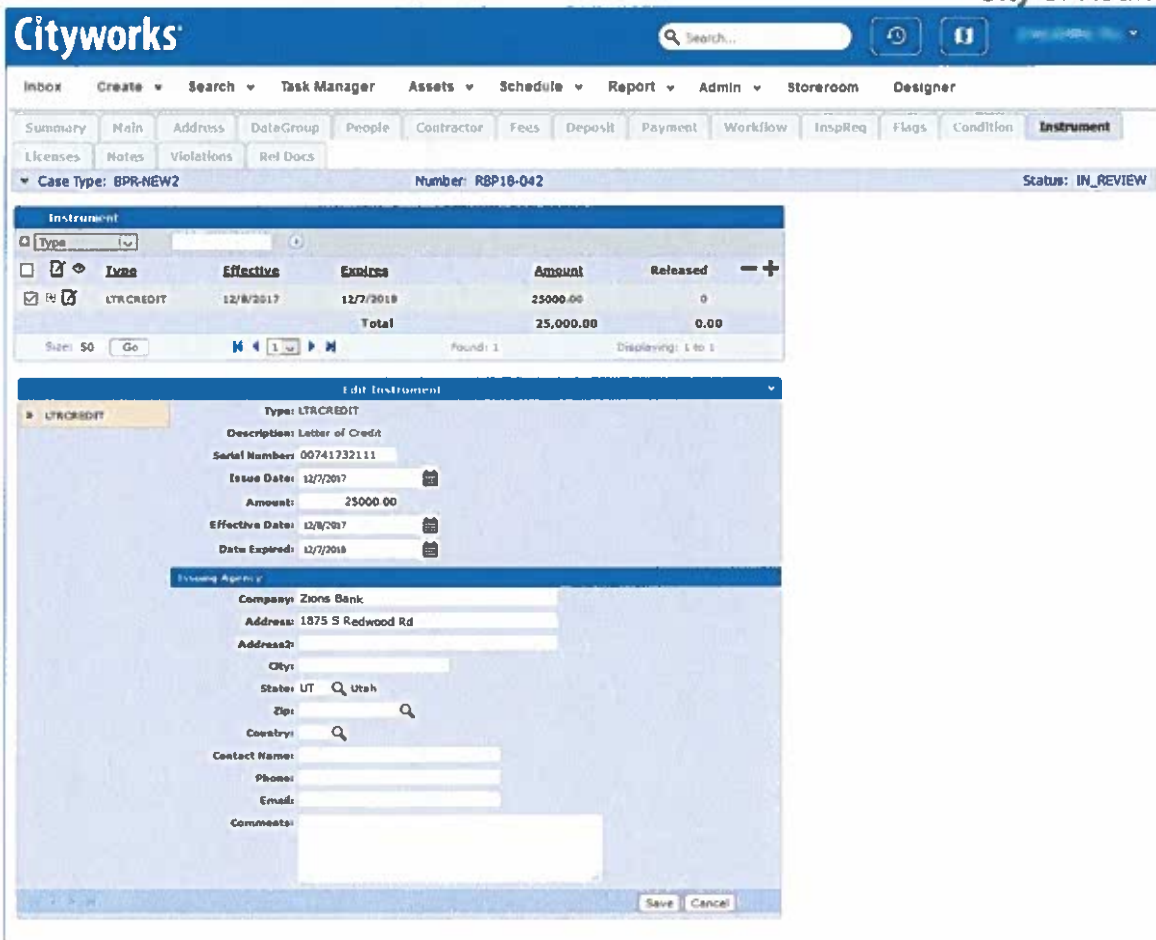
No Entries Found

Tablet for PLL—Flags display

Instruments

Financial instruments used for development and construction projects can be tracked as part of a case. This can include bonds, letters of credit, etc. The release of moneys based on work completed or a fixed value for a project can be tracked and deducted from the total financial amount.

Software and Implementation Services for Community Development System City of Round Rock, TX



Cityworks Search...

Inbox Create Search Task Manager Assets Schedule Report Admin Storeroom Designer

Summary Main Address DataGroup People Contractor Fees Deposit Payment Workflow InspReq Flags Condition **Instrument**

Case Type: BPR-NEW2 Number: RBP18-042 Status: IN_REVIEW

Type	Effective	Expires	Amount	Released
LTCREDIT	12/8/2017	12/7/2018	25000.00	0
Total			25,000.00	0.00

Size: 50 Go Found: 1 Displaying: 1 to 1

Edit Instrument

Type: LTCREDIT

Description: Letter of Credit

Serial Number: 00741732111

Issue Date: 12/7/2017

Amount: 25000.00

Effective Date: 12/8/2017

Date Expired: 12/7/2018

Issuing Agency:

Company: Zions Bank

Address: 1875 S Redwood Rd

Address2:

City:

State: UT Utah

Zip:

Country:

Contact Name:

Phone:

Email:

Comments:

Save Cancel

Tablet for PLL—Instrument example

Notes

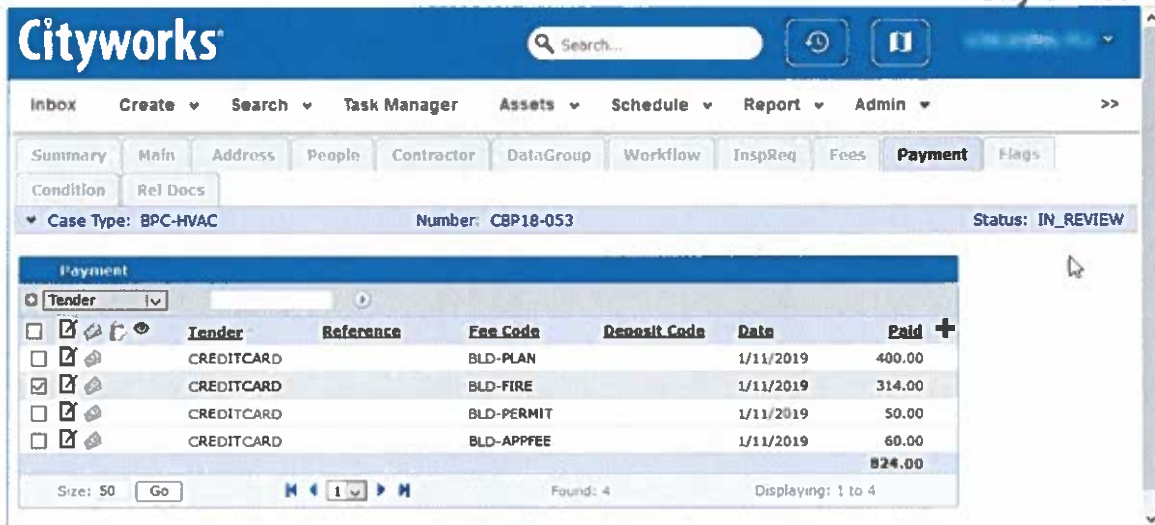
Notes can be added to each permit. A predefined list of notes is provided for easy reference and data entry, or users may create custom notes as well.

Payment

Cityworks has a built-in cashiering tool designed to manage financial transactions and does not store the personal information (such as credit card or account numbers) of individuals paying fees. Cityworks records that a payment has been made. Running credit cards, charging accounts, etc., is handled outside the system.

Functions are available to view receipts, view payments, edit the deposit, refund a payment, and add a new payment. A receipt can be printed upon payment.

Software and Implementation Services for Community Development System City of Round Rock, TX



Cityworks Search...

Inbox Create Search Task Manager Assets Schedule Report Admin

Summary Main Address People Contractor DataGroup Workflow InspReq Fees **Payment** Flags

Condition Rel Docs

Case Type: BPC-HVAC Number: CBP18-053 Status: IN_REVIEW

Payment

Tender

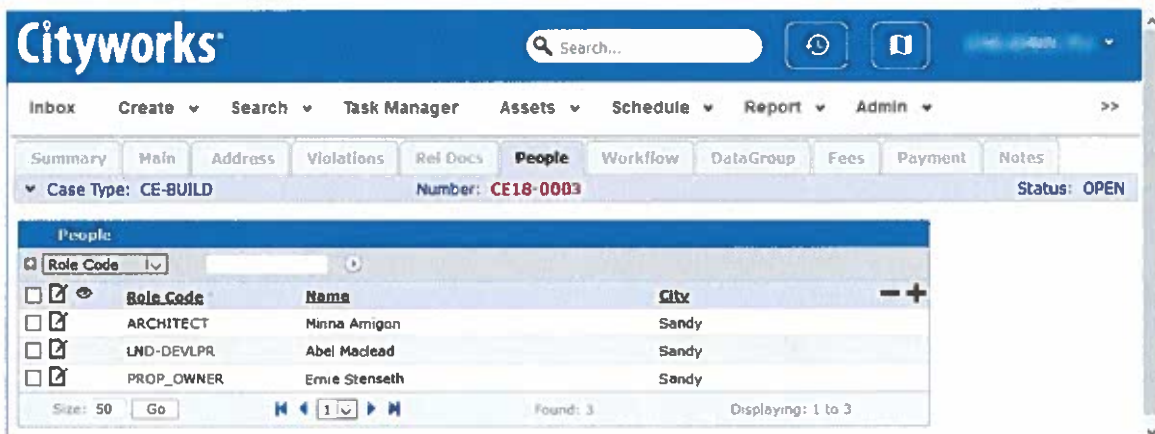
	Tender	Reference	Fee Code	Deposit Code	Date	Paid
<input type="checkbox"/>	CREDITCARD		BLD-PLAN		1/11/2019	400.00
<input checked="" type="checkbox"/>	CREDITCARD		BLD-FIRE		1/11/2019	314.00
<input type="checkbox"/>	CREDITCARD		BLD-PERMIT		1/11/2019	50.00
<input type="checkbox"/>	CREDITCARD		BLD-APPFEE		1/11/2019	60.00
						824.00

Size: 50 Go Found: 4 Displaying: 1 to 4

Tablet for PLL—Payment

People

The people associated with each permit or case are stored by user-defined roles. These roles can include applicant, contact, business owner, engineer, contractor, etc.



Cityworks Search...

Inbox Create Search Task Manager Assets Schedule Report Admin

Summary Main Address Violations Rel Docs **People** Workflow DataGroup Fees Payment Notes

Case Type: CE-BUILD Number: CE18-0083 Status: OPEN

People

Role Code

	Role Code	Name	City
<input type="checkbox"/>	ARCHITECT	Minna Amigon	Sandy
<input type="checkbox"/>	LND-DEVLPR	Abel Maclead	Sandy
<input type="checkbox"/>	PROP_OWNER	Ernie Stenseth	Sandy

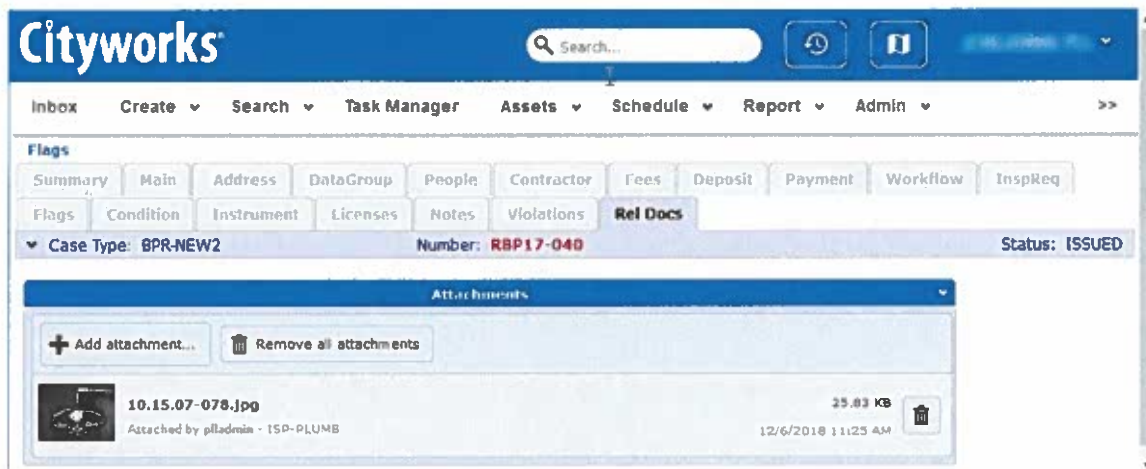
Size: 50 Go Found: 3 Displaying: 1 to 3

Office for PLL—People example

Related Documents (attachments)

Any file types can be attached to a case, and they are stored in the database or other network location. Attachments can also be added to workflow tasks.

Software and Implementation Services for Community Development System City of Round Rock, TX



Cityworks Search...

Inbox Create Search Task Manager Assets Schedule Report Admin

Flags Summary Main Address DataGroup People Contractor Fees Deposit Payment Workflow InspReq

Flags Condition Instrument Licenses Notes Violations **Rel Docs**

Case Type: BPR-NEW2 Number: **RBP17-040** Status: **ISSUED**

Attachments

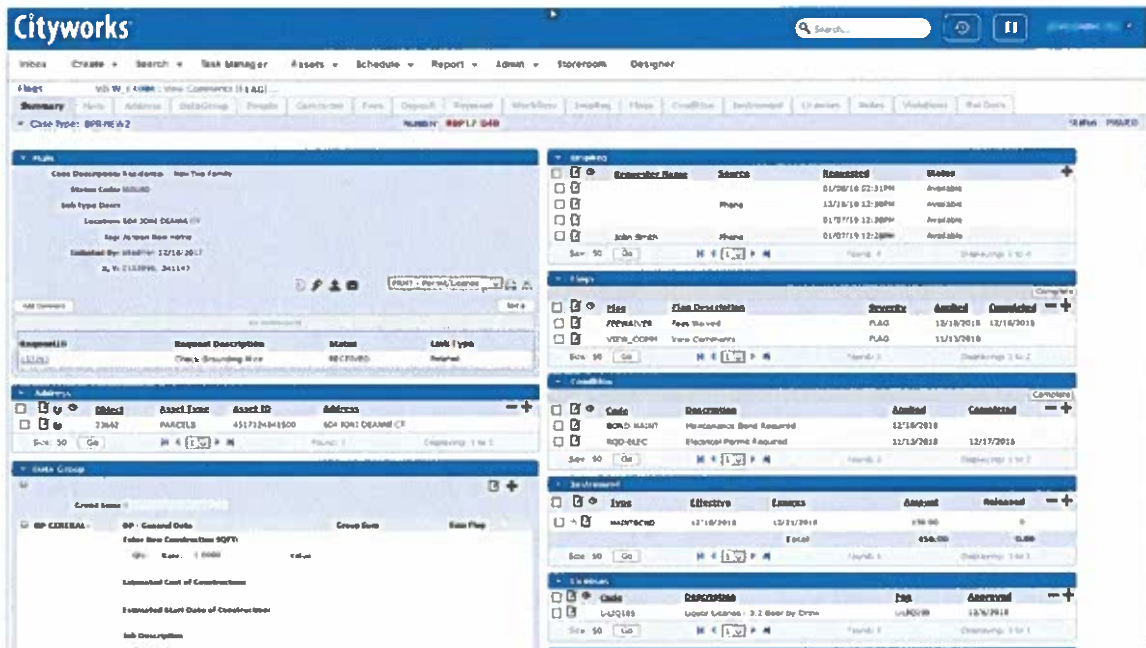
+ Add attachment... Remove all attachments

10.15.07-078.jpg 25.83 KB
Attached by pllademin - TSO-PLUMB 12/6/2018 11:25 AM

Office for PLL—Related documents example

Summary

The Summary displays all the information related to a case and contains the tools necessary to complete the case.



Cityworks Search...

Inbox Create Search Task Manager Assets Schedule Report Admin Storeroom Designer

Flags Summary Main Address DataGroup People Contractor Fees Deposit Payment Workflow InspReq

Case Type: BPR-NEW2 Number: **RBP17-040** Status: **ISSUED**

Flags

Case Description: 6 up/dumb New Two Family
Status: Called 12/18/18
Sub Type: Down
Location: 604 20th DEANES CV
Reg. Agent: Ron Harty
Submitted By: 12/18/2017
A. N. 0133996 341147

Request Log

Request ID	Request Description	Status	Last Type
11111	Check Building Work	RECEIVED	Request

Submittals

Submittal ID	Asset Type	Asset ID	Address
23642	PARCELS	451724041500	604 20th DEANES CV

DATA GROUP

Created Items

BP EXCELCEL	BP - General Data	Group Data	Site Flag
	Enter New Construction SQFT		
	QTY: 500	10000	10000

Estimated Cost of Construction

Estimated Start Date of Construction

Sub Description

Violations

Violation ID	Violation Description	Severity	Assigned	Completed
11111	FEES REQUIRED	PLAG	12/18/2018	12/18/2018
11112	VIOLATION	PLAG	12/18/2018	12/18/2018

Code

Code	Description	Assigned	Completed
BOND-16247	Performance Bond Required	12/18/2018	12/17/2018
RQD-612C	Electrical Permit Required	12/18/2018	12/17/2018

Inspection

Inspection ID	Effective	Expires	Assigned	Released
11111	12/18/2018	12/17/2018	100.00	0.00
			Total	450.00

Code

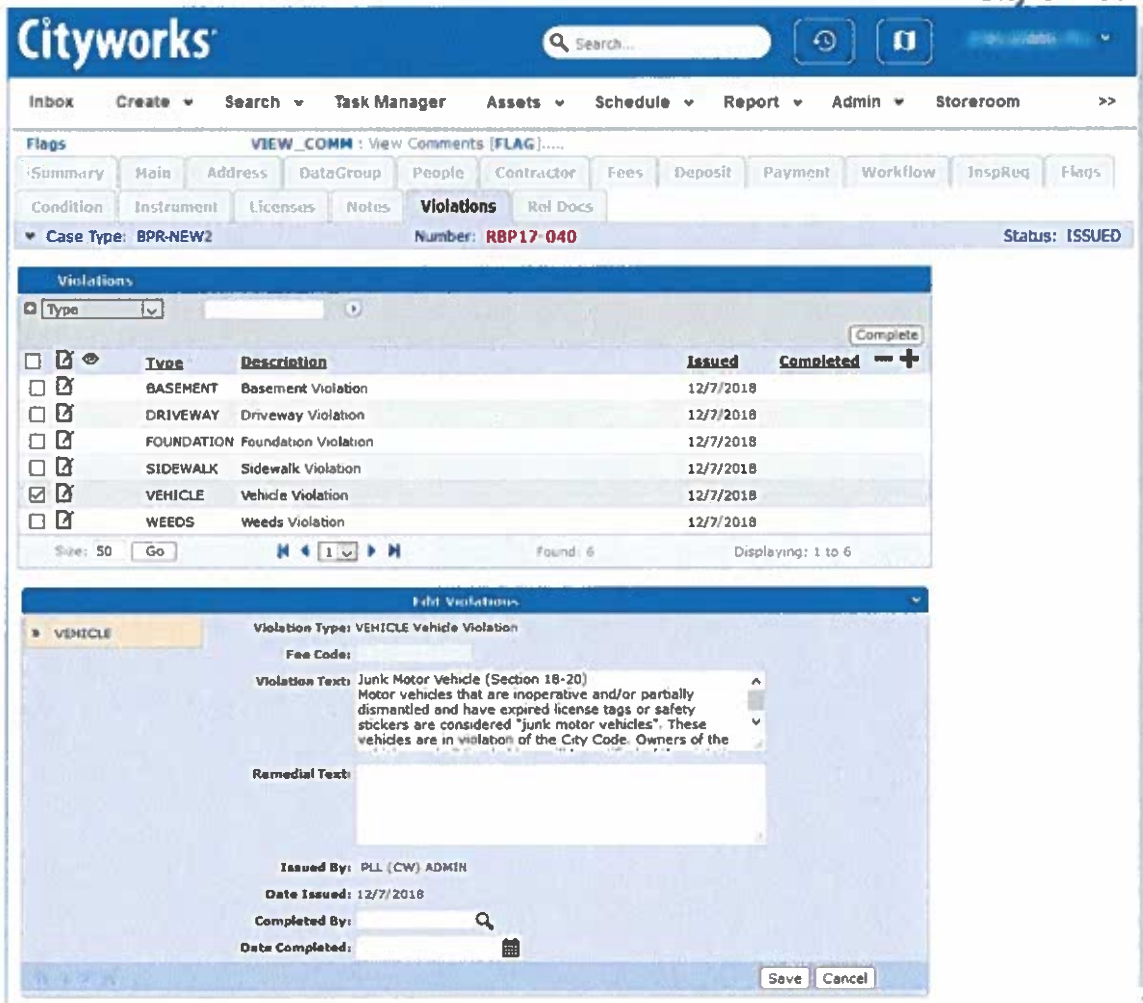
Code	Description	Assigned	Completed
11111	Local License - 3.2 Beer by Drink	12/18/2018	12/17/2018

Office for PLL—Summary tab

Violations

Cityworks tracks violation types and municipal code excerpts for each violation. The Violations panel identifies the fee code, violations legal description, details of how the violation can be resolved, the issuing employee, and the date. A fee may be linked to violations and automatically associated to a fee for the case.

Software and Implementation Services for Community Development System City of Round Rock, TX



Cityworks Search...

Inbox Create Search Task Manager Assets Schedule Report Admin Storeroom >>

Flags VIEW_COMM : View Comments [FLAG].....

Summary Main Address DataGroup People Contractor Fees Deposit Payment Workflow InspReq Flags

Condition Instrument Licenses Notes Violations Rel Docs

Case Type: BPR-NEW2 Number: RBP17-040 Status: ISSUED

Violations

Type

Type	Description	Issued	Completed
<input type="checkbox"/> BASEMENT	Basement Violation	12/7/2018	
<input type="checkbox"/> DRIVEWAY	Driveway Violation	12/7/2018	
<input type="checkbox"/> FOUNDATION	Foundation Violation	12/7/2018	
<input type="checkbox"/> SIDEWALK	Sidewalk Violation	12/7/2018	
<input checked="" type="checkbox"/> VEHICLE	Vehicle Violation	12/7/2018	
<input type="checkbox"/> WEEDS	Weeds Violation	12/7/2018	

Size: 50 Go Found: 6 Displaying: 1 to 6

Edit Violations

VEHICLE

Violation Type: VEHICLE Vehicle Violation

Fee Code:

Violation Text: Junk Motor Vehicle (Section 18-20)
Motor vehicles that are inoperative and/or partially dismantled and have expired license tags or safety stickers are considered "junk motor vehicles". These vehicles are in violation of the City Code. Owners of the

Remedial Text:

Issued By: PLL (CW) ADMIN

Date Issued: 12/7/2018

Completed By:

Date Completed:

Save Cancel

Tablet for PLL—Violations example with edit panel

Cityworks in the Field

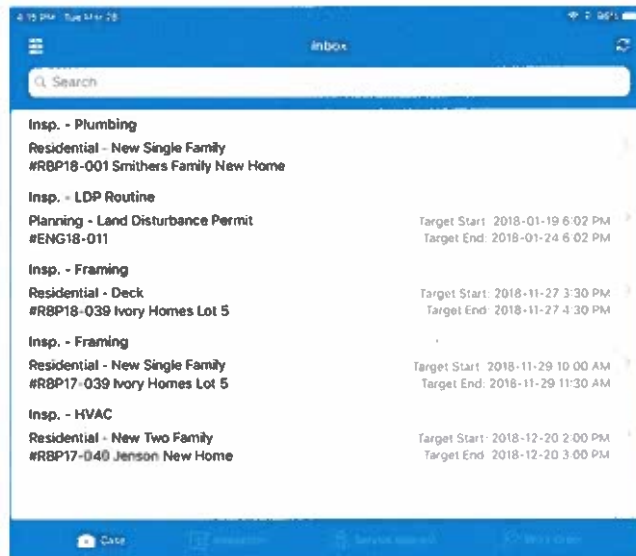
Cityworks is a system of engagement which encourages usage from outside the office environment, and sharing authoritative data with employees, customers, and others. Developed as an open platform using apps and cloud technology, users can access maps, view pertinent data, and create and update records from their mobile devices.

Cityworks has several PLL applications designed for use in the field: Tablet for PLL, Respond, Public Access, and mobile native apps for iOS and Android. Each has an interface different from the others and are configured for the relative user, purpose, and device.

Tablet for PLL is a core application built into the Cityworks platform. It offers full case management functionality and allows users to operate Cityworks in a mobile setting, such as on a tablet at a job site, and requires a constant network connection. The Tablet map opens in a separate browser tab.

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These mobile apps can also open cases in Office, Tablet, or Respond if those applications are being used. The iOS app can open cases in Collector for ArcGIS which requires Portal for ArcGIS or ArcGIS Online, and a web map. Cases can also be opened in Navigator for ArcGIS. Collector allows users to create and edit GIS features. Navigator creates navigational routes to job sites.



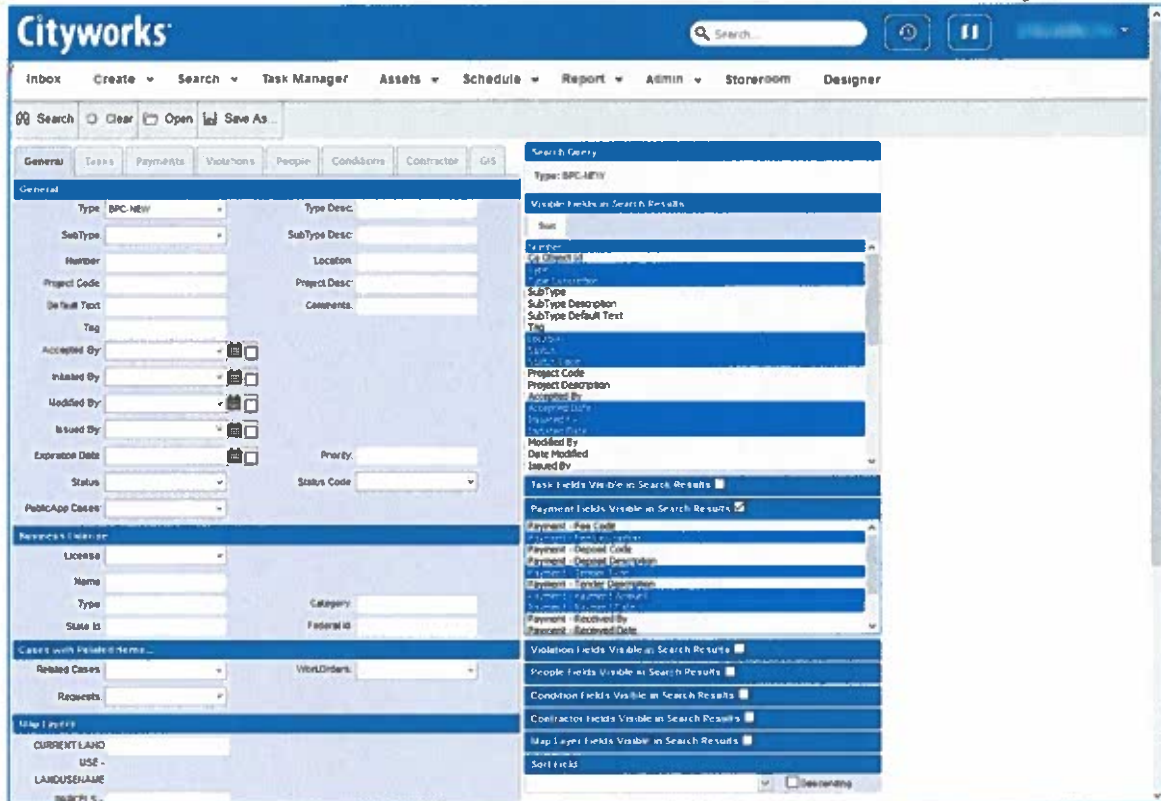
iOS app—Map and inbox

Searches and Reporting

Cityworks includes extensive search capabilities which are used to look up histories, records, and other information. Apart from standard ad-hoc searches, Cityworks allows users to search by field or by multiple fields; nearly every field in the database is linked to the search tool. Search results can be exported to Microsoft Excel, displayed in a map view, and can create navigational routes between selected record locations. Frequently used search criteria may be saved to a user's profile and added to his or her inbox, or added to the map as an event layer. Cityworks also lets users search the GIS directly, allowing them to find and view permits attached to specific assets.

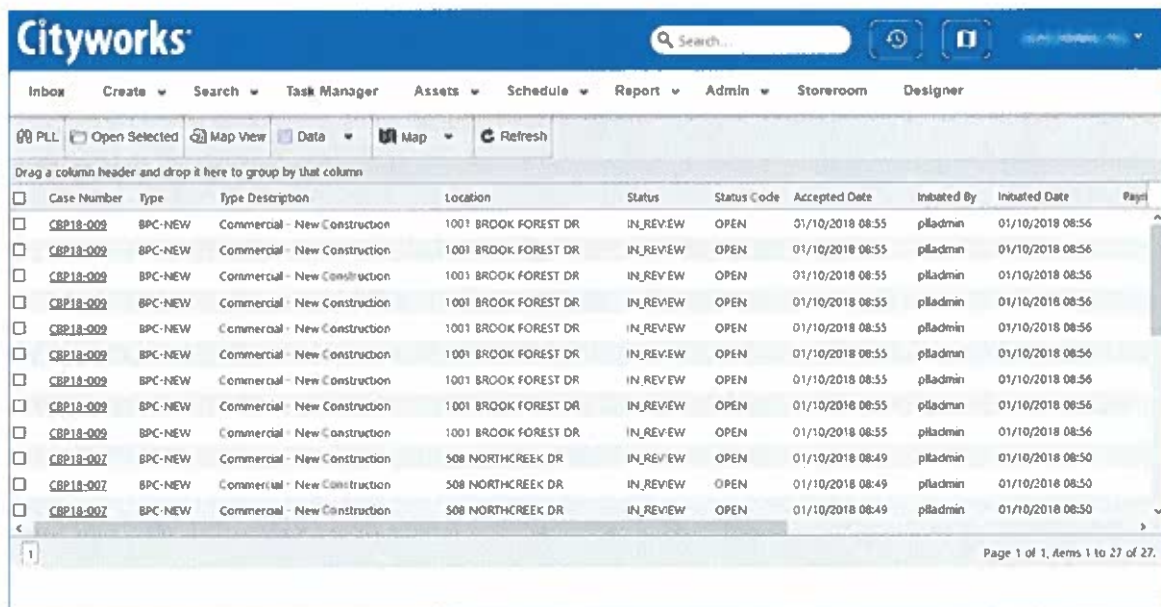
The search panel is organized into tabs of searchable fields. Users can select desired display fields and sort the search results by a specific field with the descending order option. In addition, task, payment, violation, people, condition, contractor, and map layer fields can be selected as visible fields. Search criteria can be entered onto any of the tabs prior to performing the search.

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The screenshot shows the Cityworks Search engine interface. The top navigation bar includes links for Inbox, Create, Search, Task Manager, Assets, Schedule, Report, Admin, Storeroom, and Designer. Below this is a search bar and a list of tabs: General, Tasks, Payments, Violations, People, Conditions, Contractor, and GIS. The main area is divided into two columns. The left column contains various search filters such as Type, SubType, Number, Project Code, Tag, Accepted By, Initiated By, Modified By, Issued By, Expiration Date, Status, Status Code, PublicApp Cases, License, Name, Type, State ID, Category, Federal ID, Related Cases, Requests, and Map Layer. The right column contains a list of search results, including fields like Type, SubType, Project Code, Project Description, Accepted By, Initiated By, Modified By, Issued By, Expiration Date, Status, Status Code, PublicApp Cases, License, Name, Type, State ID, Category, Federal ID, Related Cases, Requests, and Map Layer. The interface is designed for searching and filtering records within the Cityworks system.

Tablet for PLL—Search engine



The screenshot shows the Cityworks Search results interface. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there is a search bar and a list of tabs: PLL, Open Selected, Map View, Data, Map, and Refresh. The main area displays a table of search results. The table has columns for Case Number, Type, Type Description, Location, Status, Status Code, Accepted Date, Initiated By, Initiated Date, and Paid. The table contains several rows of data, all with a status of 'IN REVIEW' and a status code of 'OPEN'. The interface is designed for viewing and managing search results within the Cityworks system.

Case Number	Type	Type Description	Location	Status	Status Code	Accepted Date	Initiated By	Initiated Date	Paid
CBP18-009	BPC-NEW	Commercial - New Construction	1001 BROOK FOREST DR	IN REVIEW	OPEN	01/10/2018 08:55	plladmin	01/10/2018 08:55	
CBP18-009	BPC-NEW	Commercial - New Construction	1001 BROOK FOREST DR	IN REVIEW	OPEN	01/10/2018 08:55	plladmin	01/10/2018 08:55	
CBP18-009	BPC-NEW	Commercial - New Construction	1001 BROOK FOREST DR	IN REVIEW	OPEN	01/10/2018 08:55	plladmin	01/10/2018 08:55	
CBP18-009	BPC-NEW	Commercial - New Construction	1001 BROOK FOREST DR	IN REVIEW	OPEN	01/10/2018 08:55	plladmin	01/10/2018 08:55	
CBP18-009	BPC-NEW	Commercial - New Construction	1001 BROOK FOREST DR	IN REVIEW	OPEN	01/10/2018 08:55	plladmin	01/10/2018 08:55	
CBP18-009	BPC-NEW	Commercial - New Construction	1001 BROOK FOREST DR	IN REVIEW	OPEN	01/10/2018 08:55	plladmin	01/10/2018 08:55	
CBP18-009	BPC-NEW	Commercial - New Construction	1001 BROOK FOREST DR	IN REVIEW	OPEN	01/10/2018 08:55	plladmin	01/10/2018 08:55	
CBP18-009	BPC-NEW	Commercial - New Construction	1001 BROOK FOREST DR	IN REVIEW	OPEN	01/10/2018 08:55	plladmin	01/10/2018 08:55	
CBP18-007	BPC-NEW	Commercial - New Construction	508 NORTHCREEK DR	IN REVIEW	OPEN	01/10/2018 08:49	plladmin	01/10/2018 08:50	
CBP18-007	BPC-NEW	Commercial - New Construction	508 NORTHCREEK DR	IN REVIEW	OPEN	01/10/2018 08:49	plladmin	01/10/2018 08:50	
CBP18-007	BPC-NEW	Commercial - New Construction	508 NORTHCREEK DR	IN REVIEW	OPEN	01/10/2018 08:49	plladmin	01/10/2018 08:50	

Tablet for PLL—Search results

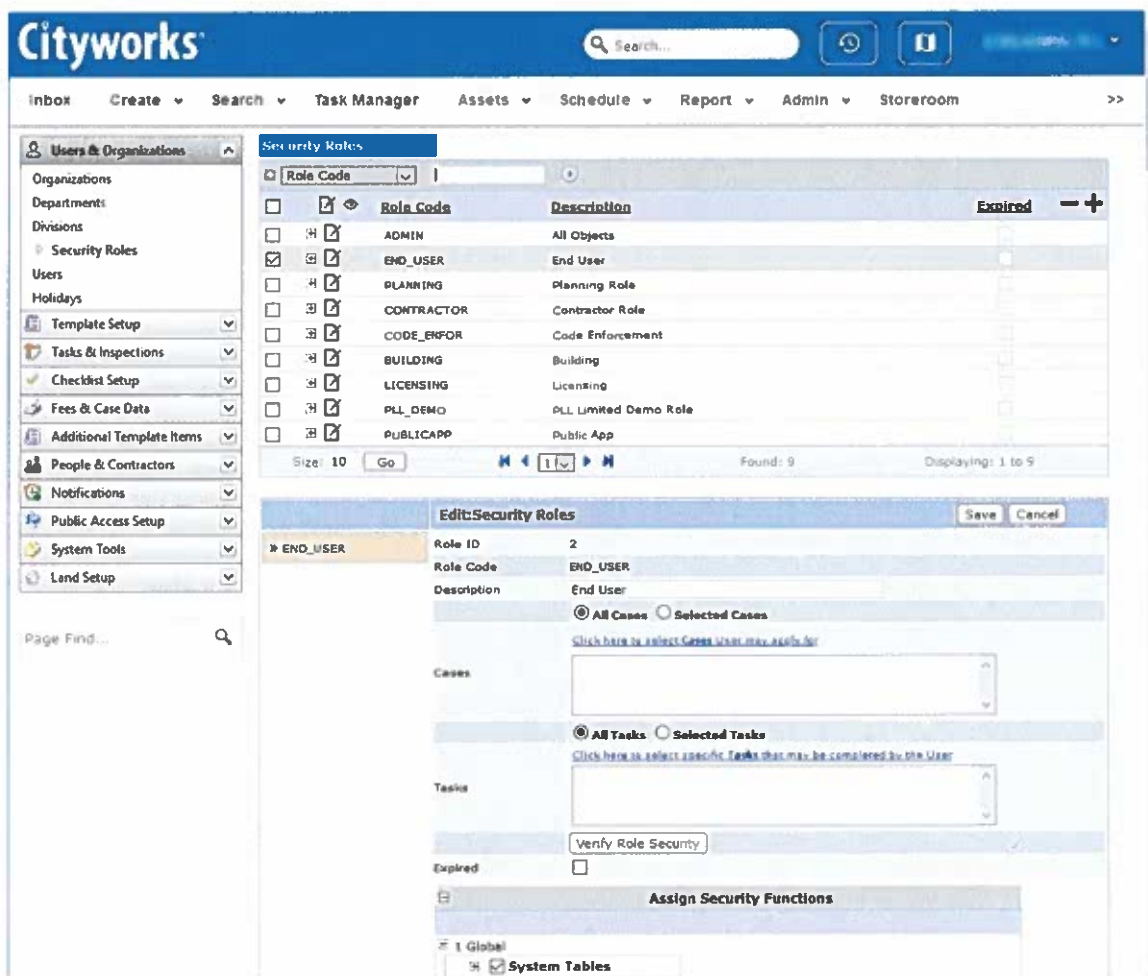
In addition to the ad-hoc search engine described above, Cityworks is integrated with Crystal Reports for detailed reporting. Reports are uploaded to the system for immediate access. Reports can be defined for each template to facilitate printing documents associated with each permit or case.

The Cityworks eURL add-on enables sharing of maps created through case, inspection, service request, and work order searches. This application generates a URL (web address) that can be used to display an event layer on another map outside of Cityworks.

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Administration and Security

PLL Admin is the interface which provides the controls, settings, and security whereby PLL is configured, organized, and managed. Administrators can create dynamic case templates, configure fees, track case-related contractor and user information, and more.



The screenshot shows the Cityworks PLL Admin interface. The left sidebar contains navigation options: Users & Organizations, Organizations, Departments, Divisions, Security Roles, Users, Holidays, Template Setup, Tasks & Inspections, Checklist Setup, Fees & Case Data, Additional Template Items, People & Contractors, Notifications, Public Access Setup, System Tools, and Land Setup. The main content area displays the 'Security Roles' configuration page. A table lists roles with columns for Role Code, Description, and Expired. The 'END_USER' role is selected. Below the table, the 'Edit Security Roles' dialog is open, showing options for 'All Cases' and 'Selected Cases', and 'All Tasks' and 'Selected Tasks'. The 'Verify Role Security' button is visible.

Office for PLL—PLL admin users & organizations security roles example

PLL Admin functions include:

- Users & Organizations—Create new or update information for existing organizations. Create profiles for those that create case types and templates. This includes management of group security settings for PLL functions.
- The system controls users' access to various functions via security roles. Security can define administrator privileges on the security roles, limit those who can create specific permits types, and control who can update certain tasks. Users can also be designated as inspectors.
- Template Setup—Create new and edit existing case templates, which include basic information, default settings, available controls, required items, categories, and map logic. By creating templates, you save the user from having to find and add these items to each new permit or license case individually.
- Tasks & Inspections—Create new or edit existing task types, task results, task codes, task map layer conditions, workflow setup, discipline/trade personnel, inspector setup, inspector time block, inspector days off, and define time accounting codes and hearing types.
- Checklist Setup—Create checklists including status codes, status groups, line items, and overall checklist setup, with the ability to edit, expire, or delete checklists.
- Fees & Case Data—Create and organize case data specific to builders, owners, and others related to specific data groups, which can be used to calculate fees. New fees can be created, modified, expired, or deleted. A variety of fee types are supported, including flat, incremental, variable, linear, minimum, percentage, and custom. Deposits can be configured, allowing clients to make advance payments on a case while giving them flexibility to apply the deposit to various other fees. Sub-licenses can be created, approved, tracked, and expired. Each sub-

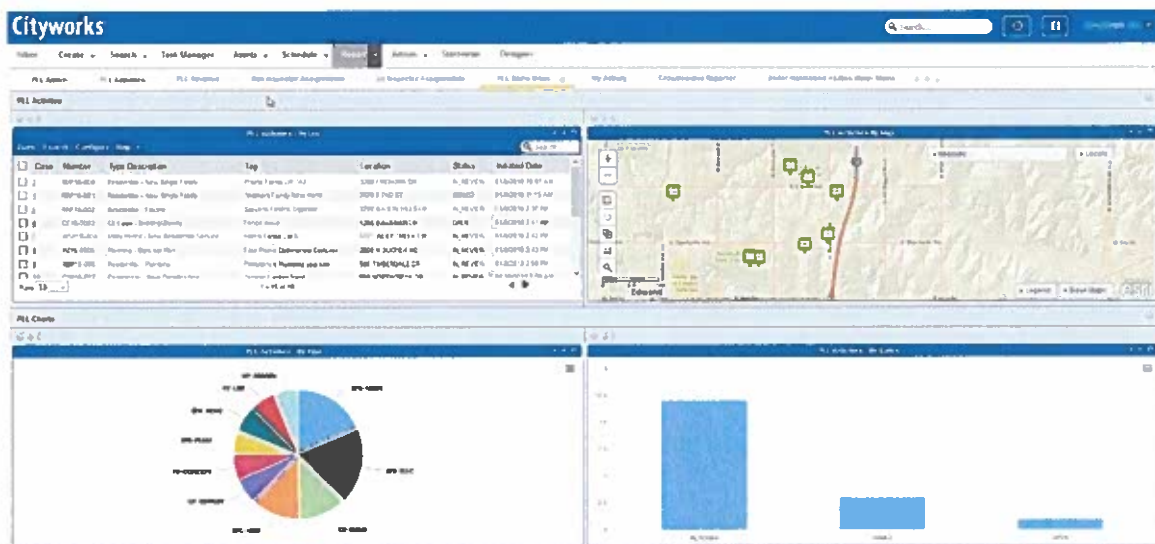
Software and Implementation Services for Community Development System City of Round Rock, TX

license will have an associated fee. Tender types defining payment options can be created, edited, expired, or deleted.

- **Additional Template Items**—Tools to define and edit violation codes, instrument types, limiting conditions, flags, predefined comments, projects, and business license types and categories.
- **People & Contractors**—Organize and track people and contractors used in maintenance, contracting, land development, and more. This allows PLL users to quickly fill in people and contractor information associated to a case.
- **Notifications**—Configuration of automatic email notifications to people or contractors triggered by an event in the process workflow (status changes, task assignment, task availability, task completion, and others).
- **Public Access Setup**—Configuration of the Public Access website, which includes: external users, home page, message boards, incomplete applications, and approved logins.
- **System Tools**—Configures the following: audit trace, accessing and editing system tables and fields, import to a table, system reports, feature console, case panel headings, user data favorite, expire cases by date or field value, license renewal or expiration, and general and public access preferences.
- **Land Setup Menu**—Contains the tools to configure the following land information: construction types, geographic areas, land form sequence controls, land object types, occupancy, country, state, structural class, subdivision, uses, zip codes, and zones.

Customization

Cityworks allows users to incorporate individualized reports, queries, map displays, and other web parts into their inboxes. This allows users to include peripherally-related data and information that are not core components of Cityworks but may be directly related to a user's needs.



Office for PLL—Inbox example

The Cityworks User Interface (UI) can be customized utilizing changes to XML or HTML files, and by incorporating stored procedures. Moreover, customization can be accomplished using Layout Manager UI rendering tools developed for Cityworks AMS/PLL. Users interact with the Layout Manager through specifically formatted XML files. Each time a page loads, Layout Manager reads the files and then interprets them to dynamically create the UI. Documentation and optional training classes are available to help the users understand how to customize the UI.

In addition, the UIs of Cityworks 15.4 compatible apps that are built outside of the platform can be customized utilizing Style. These currently include Respond, Storeroom, Operational Insights, Performance Budgeting, and Style. Other compatible apps will be customizable with Style as those new versions are released. Style is available to clients using the currently supported apps for which Style can be applied.

[illegible]

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Cityworks 15.6 Specifications

(Last updated: October 2020)

Cityworks Database Server*

Specifications for a Database (Intel®) Server:

- Windows Server 2012 (64-bit)
- Windows Server 2012 R2 (64-bit)
- Windows Server 2016 (64-bit)
- Windows Server 2019 (64-bit)
- 32 GB RAM (or better)
- Current Intel Xeon®/server class processor 3.46 GHz (or better)

** Database server assumes a machine hosting the organization's SDE geodatabase (supporting both editors and viewers) and Cityworks database (supporting users of Cityworks AMS/PLL). Please contact Cityworks with any questions.*

Server AMS-PLL Client

Specifications for a PC (Intel®) Client:

- 2.0 GHz Intel Core® processor (or better)
- 2 GB RAM (or better)
- Windows 10 (32/64-bit)
- Firefox*
- Chrome* (There is a known issue in Storeroom with Chrome 46)
- Microsoft Edge**

*Because browsers update frequently and silently without user prompting, if an issue arises that is determined to be the result of a browser update, we will endeavor to address it as we would any other issue of similar nature.

**Microsoft announced upcoming changes to the Edge browser to support the Chromium rendering engine. Due to these changes, we have limited support for Microsoft Edge.

AMS-PLL Application Server (~40 users)

Specifications for an Application (Intel®) Server:

- Windows Server 2012 or 2012 R2, IIS 8.0/8.5
- Windows Server 2016 (64-bit), IIS 10
- Windows Server 2019 (64-bit), IIS 10
- 12 GB RAM (or better)
- Current Intel Xeon®/server class processor 3.46 GHz (or better)
- Application consumes 1 GB of disk space (500 MB on system drive)
- .NET 4.5 Framework Windows Server features (.NET Extensibility 4.5 only if using Windows Server 2012/R2)
- .NET 4.6.2 Framework installed on both application and GIS servers. Requires Crystal Reports Runtime 13.0.16–13.0.20.
- .NET Framework 4.7.2 is required for the Cityworks application server as well as the GIS server if the Cityworks SOE is used.

We do not provide disk space requirements because it is dependent on factors like the size and quantity of attachments and map images.

AMS-PLL Application Server (~80 users)

Specifications for an Application (Intel®) Server:

- Windows Server 2012 or 2012 R2, IIS 8.0/8.5
- Windows Server 2016 (64-bit), IIS 10
- Windows Server 2019 (64-bit), IIS 10
- 24 GB RAM (or better)
- Current Intel Xeon®/server class processor 3.46 GHz (or better)
- Application consumes 1 GB of disk space (500 MB on system drive)
- .NET 4.5 Framework Windows Server features (.NET Extensibility 4.5 only if using Windows Server 2012/R2)

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- .NET 4.6.2 Framework installed on both application and GIS servers. Requires Crystal Reports Runtime 13.0.16–13.0.20.
- .NET Framework 4.7.2 is required for the Cityworks application server as well as the GIS server if the Cityworks SOE is used.

We do not provide disk space requirements because it is dependent on factors like the size and quantity of attachments and map images.

Cityworks add-ons	Cityworks Utilities interface for pavement management <ul style="list-style-type: none"> • PAVER versions 5.3.7–6.5.7
	Pavement Management 1.0 app <ul style="list-style-type: none"> • PAVER version 7.x
	Cityworks Utilities interface for CCTV <ul style="list-style-type: none"> • PACP versions 4.4 and 6.0
Supported Esri Platforms	Esri Enterprise Platforms: 10.3, 10.3.1, 10.4, 10.4.1, 10.5, 10.5.1, 10.6, 10.6.1, 10.7, 10.7.1, and 10.8
	Esri Workgroup Platforms: 10.3, 10.3.1, 10.4, 10.4.1, 10.5, 10.5.1, 10.6, 10.6.1, 10.7, 10.7.1, and 10.8
Supported RDBMS Platforms	Oracle 11g R1, Oracle 11g R2, Oracle 12c, Oracle 12c R1, SQL Server 2012, SQL Server 2014, SQL Server 2016, SQL Server 2017, and Oracle 12c R2, and Oracle 18c
Supported RDBMS Express Platforms	SQL Server Express 2012, SQL Server Express 2014, SQL Server Express 2016, and SQL Server Express 2017
Esri Platform Notes	ArcGIS Enterprise 10.8 is supported with Cityworks 15.5.4 and newer.

Feature Access via a map service requires the GIS data to be stored in an ArcSDE geodatabase—a file geodatabase is not sufficient here. To learn more about how Cityworks AMS/PLL provides comprehensive access to the geodatabase, contact Cityworks.

PUBLIC FACING PORTAL – TIMMONS GROUP PLL PORTAL

The Timmons Group PLL Portal is a public facing portal for Cityworks that leverages Cityworks Server PLL, PLL Extended API's, and is customized to meet the specific business needs of a locality. Successful implementation of the Public Portal as a core technology for Round Rock's Permitting, Licensing and Land use gives citizens the ability to apply for permits, pay fees, schedule inspections, etc. This capability includes the application of, management of, and scheduling of permits utilizing a public facing website. Additionally, the portal plugs into numerous point of sale and payment management systems including PayPal and JetPay. The PLL Portal is a map-based solution that offers two levels of access: Guest and Contractor. Guest access allows users to search for permits, view permit status, and make online payments. In addition to these features, Contractor access allows licensed contractors to apply for trade permits and schedule inspections directly through buildIT. At several localities, we have integrated the portal to Hyland OnBase's Electronic Plan Review thus allowing citizens and contractors to submit and track plan the plan review process through the portal.



The functions listed below are standard "out of the box" features of the Timmons Group PLL Portal. However, based on its extremely flexible design modifications and or enhancements can be readily added to the core product to meet diverse needs and requirements.



Allows for seamless operations remotely

Permits, Licensing, and Inspection workflows can seamlessly operate even if your local government offices are closed or staff are working from home



Can be implemented as quickly as four weeks

With nationwide contract vehicles in place to ease the procurement process, we have the ability to have this up and running in as quickly as four weeks



Provides an easy, user friendly system

Cityworks PLL and the Timmons Group PLL Portal can provide an easy, user friendly system for your staff to manage permit applications, payment processing, document management, inspection scheduling and license renewals



Payments can be processed remotely

Allows for seamless integration of point-of-sale for citizens and internal staff



Migrates all communication to the web

Migrates all traditional counter-based communication and phone interactions to this web-based tool



Software and Implementation Services for Community Development System City of Round Rock, TX

Searching

- Search Permit by Case Number
- Search Permit by Name
- Search Permit by Location
- Search Permit by Type

Payments

- Make a payment against your permit as soon as its accepted
- Make payments against new fees assigned based on workflow actions

Printing

- Print Crystal Reports
- Limit printing based on locality's business rules

Applying for Permits

- Select your address from a map
- Verify what case type you can apply for based on your business rules
- Make case data required

Scheduling

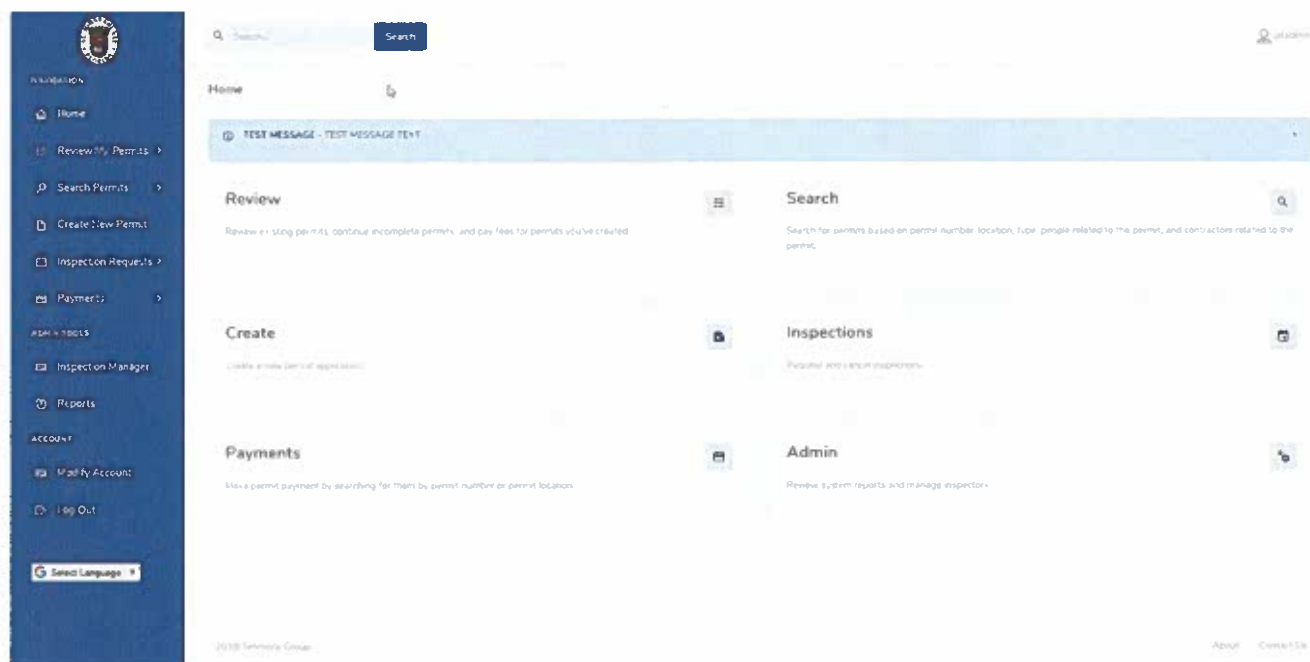
- Schedule from a list of your available inspections
- Leave comments for the inspector
- Cancel or change inspection time
- Build your own scheduling rules

Timmons Group PLL Portal – Core Functionality

ID	Functionality	Functionality Definition
1	Account Creation, login and existing account check	The user can login to the Portal with a username and password. If the user does not have a username or password, they can create a new account. Guest Access does not require login credentials but limits functionality within the Portal.
2	Account Modification	The user can modify account information: email, address, phone number, security question, security answer.
3	View Permit Information	The user can view permit information: location, people, tasks, inspection requests, fees, and payments.
4	Schedule Inspection Request	The user can schedule inspection request on inspections where they are the contact, are in an open milestone and available.
5	Apply for a Permit	<div>The user can apply for a permit through the Portal. The user is given the option to apply for a child or standalone permit. A child permit will require a parent permit number to link. The user will be given the opportunity to submit the following information:</div> <ul style="list-style-type: none">• Case Type• Location• People/Contacts• Contractors• Case Data• Attachments

Software and Implementation Services for Community Development System City of Round Rock, TX

Timmons Group PLL Portal – Core Functionality		
ID	Functionality	Functionality Definition
6	View Job Summary	A crystal report defined by Client.
7	Permit Payment	The user will be given the option to pay permit fees with Paypal (out of the box). Other payment systems can be easily integrated.
8	Permit Application and payment receipt printing	The user will be given the option to print the application/permit information. The user will be given the option to print a receipt after payment.
9	Required Fields	The user will be required to submit any case data items that are required within the configuration of Cityworks PLL.
10	Print Reports	The user will be given the option to print 2 custom reports identified by the City.
11	Review Open/Incomplete	The user can view open permits where they are a contact. The user can view incomplete applications that they have started in the Portal but not yet configured.
12	Guest User Access	The user can access the portal as a Guest requiring no login credentials. Portal functionality is limited.
13	Disclaimer	The user will be shown a disclaimer and are required to accept the disclaimer before they may submit a permit.
14	Search	The user can search for permit information by Permit Number, Name of people, contractor license number, Permit location or permit type.





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COSTS

The following tables represent a traditional approach. Associated costs are with Timmons Group doing the traditional bulk of services, leading the project, etc.

Cityworks PLL Implementation Scope Items (Traditional approach)	Cost
Cityworks PLL Software License	n/a
Implementation Fees	\$ 191,310.00
Data Conversion	\$ 38,500.00
System Integrations	\$ 55,410.00
Hardware (Hosting provided by Timmons Group via AWS, annual fee)	n/a
Training	\$ 21,640.00
On-site Go Live support	\$ 4,760.00
Ad-Hoc support (40 hours after Go-Live)	\$ 6,400.00
Expenses/Travel Costs	\$ 19,740.00
Total	\$ 337,490.00

Timmons Group PLL Portal Scope Items	Cost
Software cost (initial cost, annual fee is \$12,000)	\$ 35,000.00
Implementation	\$ 5,000.00
Total	\$ 40,000.00

Annual re-occurring costs	Cost
TG PLL Portal annual license cost (support, upgrades, etc.)	\$ 12,000.00
Total	\$ 12,000.00

Optional TG developed PLL Enhancement tools	Cost
Data Pusher	\$ 4,000.00
People Pusher	\$ 2,500.00
Parent/Child Relationship	\$ 10,800.00
Total	\$ 17,300.00

Software costs for Year #1 will be due at the time of contract execution. Costs will be billed on a monthly percent complete basis for professional implementation services. Fees will be due net 30 days.

Ad-hoc professional services are optional, if requested these services will be provided at the flat rate of \$150 per hour for the duration of this contract.

Timmons Group provides the following details to the cost tables presented above so that Round Rock can understand the cost buildup:

Cityworks PLL Implementation Scope Items (Traditional approach) - details	Cost
Tyler MUNIS integration	\$ 16,040.00
Faster integration	\$ 10,480.00
Appraisal District – develop & configure workflows	\$ 13,890.00
SharePoint integration (T&M task with a Not to Exceed fee)	\$15,000.00
Cityworks PLL Project Management, Discovery, Configuration, Testing & UAT	\$ 191,310.00
Data Conversion	\$ 38,500.00
Training	\$ 21,640.00
On-site Go Live support	\$ 4,760.00
Ad-Hoc support (40 hours after Go-Live)	\$ 6,400.00
Expenses/Travel Costs	\$ 19,740.00
Total	\$ 337,490.00

CASE STUDY: CITYWORKS PLL & TIMMONS GROUP PORTAL

Here is a recent article detailing the solution set of tools we are proposing to Round Rock that was recently implemented at Escondido CA by Timmons Group:

[Citizen-Focused Community Development](#)

[Cityworks Magazine](#), [Cityworks News](#), [Permits and Licensing](#), [Solutions](#) | Oct 30, 2019

INTEGRATING BEST-OF-BREED SOLUTIONS TO UNLEASH THE FULL POTENTIAL OF CITYWORKS PLL

Many of us today connect to the world through our mobile devices. We can see what's happening at our front door even when we're not at home. With just a few screen taps, we can purchase goods that are delivered the next day. Countless apps and services provide us near real-time updates on everything from weather alerts and sports scores to our daily routines and interactive hobbies.

Understandably, people also expect similar levels of service from their local governments. The most effective way for a municipality to meet this demand is through an integrated enterprise solution that engages residents, shares and collects information, and supports collaboration across departments. The City of Escondido implemented one such solution for its business licensing division and is in the process of implementing it in other departments.

Fueled by a strong economy, Escondido has experienced an influx of revitalization construction and new development. However, with roughly 2,000 new permits each year and 10,500 existing business licenses on an annual renewal cycle, city staff were struggling to keep up.

For years, Escondido has used Cityworks AMS and Esri's ArcGIS as an end-to-end solution for asset management, with CitySourced as their customer-facing service request and community engagement solution. The city needed a similarly integrated solution for land management, community development, business licensing, permitting, inspections, and more. They also needed the solution to be GIS-centric.

"Our philosophy is to implement technology solutions that address the end-to-end workflows and customer-to-staff processing that produce information for data-driven decisions by leadership," said Rob Van De Hey, Escondido's director of information systems.

ENGAGING THE PUBLIC

Ultimately, the city decided to expand their current system—keeping ArcGIS as the foundation and using Cityworks AMS and PLL for work management and data tracking.

One of Escondido's primary goals was to improve the efficiency of their customer interactions. To achieve this, they implemented Timmons Group PLL Portal, a public-facing portal that leverages Cityworks PLL and extended APIs and can be customized to meet an organization's specific business needs.

The integrated enterprise system will ultimately allow for seamless communication across several different divisions: operations and maintenance, engineering, facilities, fire, planning, code enforcement, permitting, plan review, and business licensing.

It also puts the power of data entry and communication into the hands—and digital devices—of the public. Instead of calling or physically traveling to a city office, customers will be able to use the Timmons Group PLL Portal to submit applications, upload and download documents and plans, apply and renew business licenses, schedule appointments, and make payments.

The city expects to see an increase in compliance as a result of the easy-to-use customer portal.

"In the seven months since we launched the new platform, we've seen a 30 percent adoption rate among our customers," said Van De Hey. "The data collected from the new system is already leading to increased efficiency, and it's driving other improvements across the organization."

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STREAMLINING WORKFLOWS

The integrated solution will also incorporate an integration to Blue Beam for electronic plan review and document management. Once the plans are received by the city, the Cityworks PLL workflow tracks the plan review process as multiple departments and reviewers work collaboratively on a single electronic version of the plan sets.

Comments, status changes, and notifications will be provided to the customer either through comments on the plans themselves or through standardized electronic communications—emails, text messages, Timmons Group PLL Portal updates, and CitySourced app notifications.

The collaborative workflow will drastically reduce plan review times. It will also eliminate confusion caused by multiple plan sets and will help keep applicants informed on the status of their project.

IMPROVING ACCESS

Because the integrated solution is built on the foundation of ArcGIS, city staff will be able to make fact-based decisions much more quickly and effectively. For example, city code requires that establishments applying for a liquor license be at least 1,000 feet away from any school. Thanks to GIS data, validating this requirement on a new application would take just seconds.

City staff will also benefit from mobile functionality available in Cityworks Respond 2.0 and the Cityworks mobile native apps.

"We wanted to give our employees effective tools for doing work when and where they need to," explained Van De Hey. "Our field staff will be able to spend 20 to 30 percent more time out in the field completing inspections, working code enforcement cases, and interacting with customers electronically. We've already been able to handle higher workload volumes with existing staffing levels thanks to the efficiencies of the integrated system."

Together, each of these best-of-breed solutions helps Escondido enhance its levels of service, increase efficiencies, and improve communication. By putting the right technologies into the hands of their employees and residents, the City of Escondido is connecting people and processes to build a vibrant, growing community.

Lou Garcia is a Principal at Timmons Group. Contact him at louis.garcia@timmons.com