



PROPOSAL

Cityworks PLL Implementation Services

Prepared for:

Whitestown Building Department

December 6, 2023

CONTACT:

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About Centricity GIS

Introduction

Centricity GIS, LLC, a GIS Consulting firm, specializes in providing implementation, data, and application development services. Our founder, Brandon Wright, possesses 20 years of GIS, Asset Management, and system integration expertise, ensuring quality. Our technical staff, each with a minimum of 5 years of experience, supports a range of disciplines.

Besides specific project services, we augment agency staff by offering on-site resources such as programmers, analysts, and technicians.

As a Cityworks Business Partner, Centricity GIS focuses on CMMS and GIS services for public entities including Cities, Counties, and Water Agencies. Our specialization extends to implementing Cityworks and ESRI technologies, ranging from Esri's ArcGIS for Local Government solutions to custom PLL implementations, ensuring a quick return on investment.

Situated in Cedar Hills, Utah, we are just 30 minutes away from Cityworks headquarters.



Experience.

Centricity GIS stands as a full-service, multidisciplinary asset management and permitting system consultant, catering to municipal governments and both private and public utilities.

Our approach combines proven implementation strategies with attention to your business processes, workflows, system requirements, and training.

With nearly 20 years in the Asset Management and Permitting Industry, Centricity GIS has successfully performed over 50 unique Cityworks implementations. The adaptability of the Cityworks platform aligns with our extensive expertise in system design and implementation.

Our in-depth knowledge of permitting processes ensures efficiency and effectiveness throughout all implementation phases.

In-house developers at Centricity GIS focus on core Cityworks integrations and development tools, having a history of integration with Cityworks across various systems, including:

- Customer Account Information
- Financial Systems
- Utility Billing
- SCADA
- Citizen Reporting





Cover Pages/Executive Summary

December 6, 2023

Subject: Cityworks PLL Implementation

Whitestown Building Dept,

This proposal outlines our approach to providing implementation services for the Cityworks PLL solution, a system distinct in its ability to fully utilize your GIS parcel records throughout your workflow. Unlike conventional methods that attempt to sync GIS records with a permit database, we leverage your map data as the primary system of record.

Centricity GIS, as a Cityworks Business Partner located in Cedar Hills, Utah, boasts significant expertise in this field. My personal background includes prior employment with Cityworks, coupled with over 20 years of hands-on experience in successfully completing Cityworks implementation projects.

The identified projects can be tailored and implemented separately to align with the City's specific requirements.

This proposal includes the following services:

- Workflow Review Meetings (Onsite)
- Initial Cityworks Database Configuration
 - Workflows for: Building Department
 - Crystal Reports
 - Application Data
 - o Contractors
 - Fees/Deposits
 - Cityworks Public Access Setup/Configuration
- Review of Configured Database (Onsite)
- Admin User Training (Onsite) Train the Trainer style
- End User Training (Onsite)
- Rollout Support
- Ad-Hoc Support
- Data Migration

Hourly rates for Centricity GIS (Ad-Hoc) are \$200/hour, billed monthly on the 1st business day following month's end.

Please let me know if you have any questions or concerns regarding this proposal.

Sincerely,

Brandon Wright Founder | President

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801-376-8160

Approach and Methodology

A. INTRODUCTION

This proposal defines the scope of work for the initial implementation of the Cityworks PLL solution tailored to Recognizing that the City does not currently utilize Cityworks, Centricity GIS has identified a set of tasks and requirements specifically aligned with the City's needs. Our approach and methodology are designed to seamlessly integrate Cityworks PLL into the existing framework, introducing an innovative system that enhances efficiency and responsiveness within the City.

- Workflow Review Meetings (Onsite)
- Initial Cityworks Database Configuration
 - Workflows for: Building Department
 - Crystal Reports (10 reports included)
 - \circ Application Data
 - o Contractors
 - o Fees/Deposits
- Review of Configured Database (Onsite)
- Admin User Training (Onsite) Train the Trainer style
- End User Training (Onsite)
- Rollout Support
- PLL Public Access Portal Setup/Centricity PLL Citizen Portal Setup (postimplementation)
- Ad-Hoc Support
- Data Migration in to Cityworks PLL





The following tasks are included in this scope of work:

TASK 1: WORKFLOW REVIEW MEETING (REMOTE - 1 DAY)

Meet with the City staff to meticulously evaluate and plan the workflows that will be established and configured within the Cityworks PLL Application for the City. This collaborative process involves an in-depth understanding of the current operational dynamics and the unique requirements of the City. With a commitment to ensuring seamless integration and enhanced efficiency, Centricity GIS will facilitate a series of discussions and workshops with key personnel. The goal is to craft a PLL workflow that is not only compatible with existing systems but also aligned with the strategic objectives and functional demands of the City.

Tasks:

- 1. Confer with City staff to thoroughly review and comprehend the specific PLL workflows, ensuring alignment with the City's operational requirements.
- 2. Obtain essential documentation from the City to formulate the foundation for the PLL configuration, including:
 - a. Process Documentation or Diagrams: To visualize and map the workflow.
 - b. Reports: For insights into existing processes and performance metrics.
 - c. Fee Schedules: To integrate financial considerations and structures.
 - d. Application Documents: To comprehend and implement relevant applications.

Deliverable Milestones:

a. Meeting Notes





TASK 2: INITIAL CITYWORKS DATABASE CONFIGURATION

The seamless integration of PLL workflows into Cityworks is central to this task. This requires a meticulous configuration process that is aligned with the specific needs and regulations relevant to the City.

Tasks:

- 1. **Cityworks Database Configuration:** Constructing and tailoring the Cityworks database to facilitate efficient processing and management within the PLL system.
- **2. Customized Workflows** for the City: Creating specialized workflows to manage various permits/applications for Whitestown Building Department.

Deliverable Milestones:

a. Configured Database





TASK 3: REVIEW OF CONFIGURED DATABASE (REMOTE)

Meet with the City staff to comprehensively review both the workflows and the Cityworks setup that has been meticulously configured. This collaboration aims to ensure that the system aligns with the City's unique needs and operational requirements. By inviting feedback and insights from key personnel, we intend to validate the effectiveness of the configuration and make necessary adjustments. The process underscores our commitment to delivering a Cityworks solution that is not only functional but also tailored to the strategic objectives and everyday demands of the City.

Tasks:

- 1. **Database Review:** Conduct an exhaustive examination of the configured Cityworks database, ensuring that its structure, functionality, and alignment with the City's requirements are precise. This process includes verification of data integrity, relationships, and overall coherence within the system.
- 2. Workflow changes and Configuration Adjustments as Needed: Evaluate the configured workflows for potential enhancements or necessary modifications. This includes a flexible approach to making realtime adjustments, aligning with feedback, updated requirements, or evolving operational needs within the City. It reflects a commitment to continuous improvement and adaptability, guaranteeing a solution that remains responsive to the unique demands of the City.

- a. Meeting Notes
- b. Configuration changes





TASK 4: ADDITIONAL INFORMATION CONFIGURATION (REMOTE)

Centricity GIS will meticulously configure the Cityworks system to encompass a comprehensive range of essential details, reflecting the unique operational needs of the City. This will include the integration of information collected from application forms, an organized structure for managing fees and deposits, the classification and handling of various contractor types, and the inclusion of any additional or ancillary application data that must be tracked. The aim is to create a cohesive and efficient platform within Cityworks, where all pertinent information is seamlessly connected, easily accessible, and aligned with the City's regulatory requirements and strategic objectives.

Tasks:

- 1. Configure additional info
- 2. Configure Fees/Deposits
- 3. Configure Contractor Types
- 4. Any Additional Application Data

- a. Meeting Notes
- b. Any additional configuration changes





TASK 5: REPORTS AND INBOXES/DASHBOARDS (REMOTE)

Centricity GIS will expertly construct up to 10 specialized reports using SAP Crystal Reports, extracting and presenting Cityworks data in diverse formats and layouts tailored to the City's specific needs and preferences. These reports will not only facilitate in-depth analysis but also support informed decision-making by presenting relevant insights.

In addition to report building, Centricity GIS will strategically configure inboxes and dashboards within Cityworks. This design will enhance the user experience by providing an intuitive interface where users can effortlessly locate pertinent information such as available tasks, open permits, and other key data. The configuration will be aligned with the operational flow of the City, ensuring that the right information is available at the right time, thereby optimizing efficiency and responsiveness.

Tasks:

- 1. Configure 10 Crystal Reports
- 2. Configure Inboxes and Dashboards

- a. 10 Crystal Reports
- b. At least one inbox/dashboard per user





TASK 6: ADMIN TRAINING (ONSITE – 1 DAY)

Centricity GIS will deliver a specialized, onsite training program specifically designed for the primary, or "Administrator," users of Cityworks within the City. The City will be responsible for supplying the training facility and required computers for staff use during this comprehensive training session.

Following the training of Administrator users, Centricity GIS will conduct a "Trainthe-Trainer" style session with key City staff. The purpose of this training is to provide knowledge and steps necessary to train all other field personnel who will use the system.

Training will occur over 1 day

- a. Admin and User Training completed
- b. Copy of training material used in training session delivered in digital format (PDF)





TASK 7: END USER TRAINING (ONSITE – 1 DAY)

Centricity GIS will conduct a targeted, onsite training program expressly designed for the primary, or "End Users," of Cityworks within the City. The City will facilitate this hands-on session by supplying the training facility and the necessary computers for staff engagement.

This comprehensive one-day training will encompass the following key aspects:
1. In-depth Understanding of Cityworks Functions: Tailored to the needs of the End Users, the training will explore all relevant features and capabilities of Cityworks, ensuring users have the knowledge to effectively navigate and utilize the system.

2. Practical Application and Scenario-Based Learning: Participants will engage in real-world exercises and scenario-based learning to gain practical experience and confidence in using Cityworks for their daily tasks.

3. Preparation for Field Personnel Training: A major focus of this training is to equip the End Users with the insights and methodologies needed to train other field personnel who will be using the system. This ensures not only immediate proficiency but also ongoing skill development within the City.

Centricity GIS's approach to End User training emphasizes both immediate usability and long-term sustainability, fostering a culture of continuous learning and adaptation within the Cityworks platform.

Consecutive days immediately following Admin training

- a. User Training completed
- b. Copy of training material used in training session delivered in digital format (PDF)
- c. Go-live





TASK 8: ROLLOUT SUPPORT (ONSITE - 1 DAY)

After the comprehensive phases of configuration, installation, and training have been meticulously executed, Centricity GIS will further extend its support through Onsite Rollout Support for the City. This targeted support aims to ensure a smooth transition and operational readiness as the Cityworks platform is integrated into daily routines.

The Onsite Rollout Support will encompass the following key activities:

1. **Data and Inbox Display Consultation**: Collaborate closely with the City manager or designated champion to ascertain the specific data, inboxes, and information that need to be prominently displayed within the system. This ensures alignment with city priorities and operational needs.

2. **Dashboard Construction:** Skillfully build customized end-user and management inboxes and dashboards that present critical information in an intuitive and accessible manner. Tailoring these interfaces to the needs of different user groups fosters efficiency and informed decision-making.

3. **Cityworks Reconfiguration:** Based on insights gathered during Workflow Meetings and Admin training, perform any necessary reconfiguration of the Cityworks system. This iterative refinement guarantees that the platform remains responsive to evolving city needs and insights gained through hands-on experience.

4. **Mobile Apps Configuration:** Implement and configure the Cityworks mobile applications to extend functionality to field personnel. This ensures seamless access to essential tools and information across devices, reinforcing the platform's utility and adaptability.

Centricity GIS's Onsite Rollout Support reflects our commitment to not just implementing a solution but nurturing its success within the organizational culture and workflow of the City. By focusing on user-centered design, responsive adaptation, and continuous support, we aim to make Cityworks an integral and empowering tool for the entire City. *Consecutive day following Admin and End User Training.*

Deliverable Milestones:

a. Onsite Roll-Out Support





TASK 9: AD-HOC SUPPORT

After the meticulous completion of the configuration, installation, and training phases, Centricity GIS will continue to provide robust troubleshooting and support services, ensuring a smooth transition and ongoing success with the Cityworks platform. This support, available for up to 20 hours as needed, includes a range of essential services tailored to the City's unique requirements:

- 1. **Data and Inbox Display Consultation:** In collaboration with the City manager or chosen champion, we'll assess and define the specific data, inboxes, and other vital information that need to be accessible, aligning with City priorities and needs.
- 2. **Inbox Construction:** Skillfully construct customized end-user and management inboxes that facilitate immediate access to key information, enhancing usability and decision-making across the organization.
- 3. **Cityworks Reconfiguration:** Based on the feedback and insights from Workflow Meetings and Admin training, perform precise reconfigurations to ensure that Cityworks aligns perfectly with City processes and evolving requirements.
- 4. **Mobile Apps Configuration (if applicable):** If licenses from Cityworks are available, configure mobile applications to support field personnel, ensuring seamless and coherent access to vital tools and information across devices.
- 5. **Crystal Report Development:** Develop specialized reports using Crystal Reports, translating Cityworks data into actionable insights and analytics that support informed decision-making and strategic planning.
- 6. **Dashboards and KPIs Construction:** Build intuitive dashboards that display Key Performance Indicators (KPIs), offering a clear and concise view of performance metrics and other critical data, enhancing the ability to monitor and optimize City performance.

Centricity GIS's comprehensive troubleshooting and support services signify our ongoing commitment to the success and continuous improvement of the Cityworks implementation within the City. By providing responsive, user-centered, and adaptive support, we strive to make the Cityworks platform a valuable and integral tool within the City, tailored to both immediate needs and long-term strategic goals.

Deliverable Milestones:

a. 20 Hours included in Implementation





TASK 10: CITYWORKS PUBLIC ACCESS PORTAL SETUP FOR BUILDING DEPARTMENT

Following the comprehensive completion of the configuration, installation, and training phases, Centricity GIS will undertake the vital task of setting up the PLL Public Access Portal within the Cityworks framework for the City.

This crucial setup involves two main stages, meticulously handled to ensure seamless access and robust functionality:

1. Setup of Public Access Portal:

- **Configuration:** Tailoring the portal to align with the specific needs, guidelines, and branding of the City, ensuring an intuitive user experience.
- Integration: Seamlessly connecting the portal with existing Cityworks functionalities and databases to enable smooth data exchange and processing.
- 2. Testing:
 - **Functional Testing:** Evaluating all features, workflows, and interfaces to ascertain that they perform as intended, meet user requirements, and provide a cohesive experience.
 - User Acceptance Testing (UAT): Engaging with a select group of end-users to validate that the portal meets their expectations and needs, gathering feedback for any necessary refinements.

By focusing on a user-centered design, efficient integration, and rigorous quality assurance, Centricity GIS aims to create a Public Access Portal that not only facilitates community engagement but also reflects the excellence and dedication of the City in serving its constituency.

Deliverable Milestones:

a. PLL Portal Setup





TASK 11: HISTORICAL DATA MIGRATION FOR BUILDING INTO CITYWORKS PLL

This task involves the strategic transfer of historical data from your existing legacy system to the Cityworks PLL platform. We'll begin with an in-depth assessment and mapping of your current data, ensuring that all data types and formats are accurately aligned with their new structure in Cityworks PLL. This phase includes data cleansing to eliminate inconsistencies, ensuring the integrity of your data in its new environment.

Following the preparatory work, we will execute a meticulously planned migration process. This includes a test migration to address potential issues before proceeding to the full-scale transfer, ensuring minimal operational disruption. After the migration, we will conduct thorough verification and validation to confirm the accuracy and completeness of the data transfer. To facilitate a smooth transition, our team will also provide comprehensive training and support, focusing on maximizing the efficiency and utility of your new Cityworks PLL system.

- a. Data Migration UAT
- b. Data Migration Complete





Firm Description & Project Organization

Centricity GIS, LLC is a diversified multi-service organization, excelling in the provision of specialized services within the intricate domains of Field Asset Surveying, Geographic Information Systems (GIS), and application software services. Our offerings encompass a broad spectrum of professional services, including but not limited to consulting, training, staffing, and in-depth technical support.

With a dedicated focus on GIS Centric technologies and Cityworks implementations, we have carved out a distinctive niche, particularly within the utility industry sectors of Water, Sewer, Storm, Gas, and Electric. Our industryleading standards and uncompromising quality are bolstered by an experienced team of professionals who possess over 20 years of cumulative experience in GIS and an unparalleled 30 years in Cityworks implementation.

Our commitment to excellence is not merely an aspiration but a defining trait that resonates through every project we undertake. By aligning innovation, expertise, and a nuanced understanding of industry needs, Centricity GIS not only meets but often exceeds the expectations of our clients. We leverage the rich heritage of our experience to provide solutions that are responsive, adaptable, and strategically aligned with our clients' unique requirements and objectives. Whether it's a complex surveying task or a tailored software solution, our holistic approach ensures that we deliver results that are both efficient and effective, reflecting our passion and mastery in the field.

Centricity GIS is a Dun & Bradstreet verified business (DUNS 08-085-9425).



Partners:

- Cityworks Business Partner Network
- ESRI Silver Partner







Management

Mr. Brandon Wright, founder of Centricity GIS, LLC, graduated with a B.S. degree in Business Information Systems from the University of Colorado, USA. He has over 20 years of professional experience in Cityworks and GIS within the Asset Management industry and has successfully completed over 50 Cityworks related projects. Most of his project experience is in implementing Cityworks systems with government agencies throughout United States. His core competency is in implementing Cityworks Asset Management solutions for government agencies (Water, Wastewater, Parks & Rec, etc.).

Mr. Wright manages the strategic planning, business development and company operations for Centricity GIS. He also serves as client liaison officer on all the projects by overseeing scope, schedule, budget, and time frame.

Specialties: Asset Management, Data Conversion, and Project Implementation.

PROJECT MANAGEMENT APPROACH:

The Centricity GIS President and Project Manager will attend progress meetings with the City team to provide status updates for on-going tasks. Centricity GIS will also submit monthly progress reports and invoices, accompanied with a detailed delivery report.

Software Skills

GIS Software: ArcGIS Desktop, ArcGIS Online, ArcGIS Server, ArcGIS Pro

Asset Management Software: Cityworks PLL and AMS

Databases: Access, SQL Server, Oracle, Geodatabase

Reporting Tools: Crystal Reports, SQL Server Reporting Services





Qualifications and Past Performance

The following table shows the combined project experience of our team.

Centricity GIS Reference Sites

Client	Implementation	Support	PLL	AMS	Reporting	Integrations
Moses Lake, WA	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark
West Valley City, UT	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark
Park City, UT	\checkmark	\checkmark		\checkmark	\checkmark	
Herriman, UT	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark
Saratoga Springs, UT	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	
Rancho Palos Verdes, CA	\checkmark	\checkmark		\checkmark	\checkmark	
Las Gallinas Valley Sanitary District, CA		\checkmark		\checkmark		
Redlands, CA	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark
Cook County, IL	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	
DDOT, Washington, DC	\checkmark	\checkmark		\checkmark	\checkmark	
Apex, NC	\checkmark	\checkmark		\checkmark	\checkmark	
Houston, TX	\checkmark	\checkmark		\checkmark	\checkmark	
Ruidoso, NM	\checkmark	\checkmark		\checkmark	\checkmark	





EDUCATION

Bachelor of Science Degree, Business Information Systems, University of Colorado



Brandon Wright Founder/Project Oversight

Mr. Wright has over 10 years of experience providing Asset Management and GIS services to public agencies. Mr. Wright has been responsible for directing asset management projects and addressing logistical and technical concerns. Prior to working at Centricity GIS, Mr. Wright worked Cityworks for 10 years.

Services include database development/administration and maintenance, map creation, needs assessment, implementation, and integration. Integration services include integrating GIS databases (SQL Server or Oracle) with other systems such as Asset Management Systems, Customer Billing, Document Management and Work Orders. He also provides system training, and general IT consulting services.

Summary of Skills

- Expertise using ESRI's ArcGIS software products, ArcGIS Desktop 10.x, ArcGIS Server, ArcGIS Online
- Experience in administration of Cityworks AMS & PLL
- Cityworks PLL Administration Training
- Expertise in Mapping, GIS Data Modeling, Systems Integration, Needs Assessments
- Over 10 years of Project Management experience
- Database experience with SQL Server, Oracle, and Microsoft Access

Representative Projects

- Moses Lake, Washington, Cityworks and PLL Implementation
- Rancho Palos Verdes, Cityworks Implementation
- Vista Irrigation District, Cityworks Implementation
- San Mateo, Cityworks Implementation
- Cook County, IL, Cityworks and PLL Implementation
- Saratoga Spring, UT, Cityworks and PLL Implementation
- Houston, TX, Cityworks Implementation/Expansion
- DDOT (Washington, D.C.), Cityworks Implementation/Expansion
- Columbia, SC, Cityworks Implementation/Expansion
- Lafayette, LA, Cityworks Implementation
- El Paso, TX, Cityworks Implementation/Expansion
- Apex, NC, Cityworks Implementation





EDUCATION

BS Degree, Environmental Policy & Management, GIS Emphasis, University of Redlands, California

MS Degree, Geography, University of Utah, Utah



Tim Berggren

Project Manager/Solutions Architect

Mr. Berggren has over 7 years of experience providing Permitting, Planning and GIS services to public agencies. Mr. Berggren has been responsible for overseeing and directing permitting and planning projects. Prior to working at Centricity GIS, Mr. Berggren worked for Envision Utah as an Associate Planner, a senior technical support representative for Cityworks, and as a Project Manager/Cityworks Solutions Engineer for Axim Geospatial.

His experience includes primarily PLL implementation but has also implemented and configured AMS and a host of Cityworks plugins, software, and products. He has demonstrated experience in Database Development/Administration and maintenance, map creation, needs assessment, implementation, project management and integration. He also provides system training, technical support, Documentation Management, and general IT.

Summary of Skills

- Expertise using ESRI's ArcGIS software products, ArcGIS Desktop 10.x, ArcGIS Server, ArcGIS Online
- Experience in administration of Cityworks PLL & AMS
- Database experience with SQL Server
- Experience with Microsoft Azure Cloud Solutions

Representative Projects

- Aqua Water, TX, Cityworks and PLL Implementation
 - Fully implemented and configured all PLL Workflows, Case Templates, Case Data, Case Types, Tasks, Checklists, Public Access, and Users.
 - Spun up both Production and Test sites for both Office, Public Access, and all Plugins. Restored a backup of their configuration database and restored to local Axim environment.
- Guadalupe County, TX, Cityworks and PLL Implementation
 - Configured ancillary workflows, provided support and configuration revisions.
 - Implemented DigEPlan and applied API licenses and helped with onsite discovery.
- Pflugerville, TX, Cityworks and PLL Implementation
 - Configured ancillary workflows and data for over 50 permits (for both Building and Planning Department).





Fee/Cost Proposal

Task	Description	Total Cost	
1	Workflow Review Meetings (Remote)	\$	1,000
	Workflow Meetings		
	Meeting Notes	•	
2	Initial Cityworks Database Configuration (Remote)	\$	20,000
•	All groups as outlines in details section	•	4 000
3	Database Review (Remote)	\$	1,000
	Meeting Notes and Action Items	•	4.000
4	Additional PLL Information Configuration (Remote)	\$	4,000
	Configure additional info		
	Configure Fees/Deposits Configure Contractor Types		
	Any Additional Application Data		
5	Reports and Inboxes/Dashboards (Remote)	\$	4,000
5	Inboxes	ψ	4,000
	Dashboards		
	Crystal Reports		
6	Admin User Training (1 Day Onsite)	\$	2,000
	Onsite Administrator Training for City Admins		
7	End User Training (1 Day Onsite)	\$	2,000
	Onsite End User Training for City Users		
8	Rollout Support (1 Day Onsite)	\$	2,000
	Onsite Support for End Users when system goes live		
9	Ad-Hoc Support (up to 20 hours)	\$	Included
	Configuration Changes		
	Admin Support Dashboards/KPI's		
	Mobile App Configuration		
	Any other Ad-Hoc Support that may be needed		
	Additional Crystal Report Development		
10	Public Access Portal Setup	\$	5,000
	Setup Cityworks Public Access Portal		
11	Historical Data Migration (Optional)	\$	7,500
	Migrate Historical Data into Cityworks PLL		
Total	Training and Onsite Visits	\$	48,500

