Civic Platform Upgrade II

RFP #25-30

ADDENDUM No. 1

June 10, 2025

Any and all changes to the Contract Document are valid only if they are included by written addendum to all potential respondents, which will be mailed, emailed and/or faxed prior to the proposal due date to all who are known to have received a complete RFP document. Each respondent must acknowledge receipt of any addenda. Each respondent, by acknowledging receipt of any addenda, is responsible for the contents of the addenda and any changes to the proposal therein. Failure to acknowledge receipt of any addenda may cause the proposal to be rejected. If any language or figures contained in this addendum are in conflict with the original document, this addendum shall prevail.

This addendum consists of the following:

1.   Addendum Number One (1) is attached and consists of a total of twenty-five (25) pages including this cover sheet. Any changes to the contract noted within Addendum Number One (1) will be reflected in subsequent issues.

Please feel free to call (847-866-2910) or email (lithomas@cityofevanston.org) with any questions or comments.

Sincerely,

Linda Thomas
Purchasing Specialist

Civic Platform Upgrade II

RFP #25-30

ADDENDUM No. 1

June 10, 2025

This addendum forms a part of RFP #25-30 and modify these documents. This addendum consists of the following:

Questions Received:

Question 1
Question: Who completed the initial implementation and has provided services to support the system in the past?
Response: A Bronze-certified Accela partner completed the initial implementation and has since provided limited post-implementation support, in addition to Accela technical support, as part of our SLA.

Question 2
Question: What level of completeness is there for each of the areas stated in the RFP and Scope of Work section (building, planning, property standard, licenses, fire, public works, and health)?
Response: The Building, Property Standards, Public Works, and License modules are fully functional, but we plan to enhance them based on the work outlined in the RFP. Health and planning modules are partially functional, while the Fire module has not yet been started (0% complete).

Question 3
Question: Is there a backlog of tickets of work that needs to be completed? (How many?)
Response: There is no backlog of work tickets; however, business requirements still need to be defined.

Question 4
Question: How are tickets and/or planned work tasks currently managed?
Response: There is no planned work currently, and no active tickets are being managed at this time.

Question 5
Question: What types of documentations are available for the currently implemented system?
Response: There is currently no documentation available for the implemented system.

Question 6
Question: What type of pricing are you expecting to be submitted?
Response: We expect the fixed-price submitted to be fair and reasonable.

Question 7
Question: Hourly rates or a project cost for the level of work outlined in the Scope of Work and the Deliverables sections?
Response: We expect the vendor to submit a professional proposal including a fixed-price for the level of work outlined in the Scope of Work and Deliverables.

Question 8
Question: What integration is already in place?
Response: Our software, Accela Civic Platform, is integrated with DigePlan.

Question 9
Question: Are additional details available and current level of completeness on each 6 stated integrations in the Deliverables section? Laserfiche, GIS, Payment Processing System, Granicus, Google Calendar
Response: Yes, additional details are available for each of the six stated integrations in the Deliverables section; however, the current level of completeness for these integrations is low.

Question 10
Question: What other integrations are anticipated?
Response: At the time of preparing the RFP, we considered integrating with another internal system but have since decided not to proceed. We do not anticipate any additional integration as part of this project.

Question 11
Question: The RFP makes reference to "Granicus short term rental management" is short term rentals managed outside of Accela? If Accela can accommodate STR is there a plan to bring these records and processes into Accela?
Response: Yes, short-term rentals are currently managed outside of Accela through Granicus. While Accela does have the capability to handle short-term rental processes, at this time, there's no plan in place to bring those records or workflows into Accela.

Question 12
Question: What are the requirements for M/W/D/EBE utilization for this project? With this being a small and very specialized engagement for Accela support can any requirements M/W/D/EBE be waived?
Response: Refer to page 26 in the RFP for the City of Evanston M/W/D/EBE Policy and requirements. Refer to page 29 in the RFP for the M/W/D/EBE Waiver Request.

Question 13
Question: In Appendix A, if our company does not submit S.E.C. form, is it acceptable to make those questions a 'N/A'?
Response: Yes

Question 14
Question: Do all forms need to be submitted, even if they will be blank or not applicable?
Response: Yes.

Question 15
Question: In the Scope of Work section there are approximate numbers for configuration (~130), scripting (~150), reporting (~90), and integration (~6). Are these items already defined or will the vendor need to engage with your business areas to define the requirements for these? Are you able to define the level of complexity for these items? For example 150 scripting items with 50, high, 50 medium, and 50 low complexity?
Response: The items listed in the Scope of Work - approximately 130 configuration, 150 scripting, 90 reporting, and 6 integration items were determined based on preliminary conversations with stakeholders yet are not fully defined at this time. The vendor is expected to engage with the business to gather and define detailed requirements. Also, we are unable to provide a breakdown by the complexity for these items, but we recognize the importance of doing so and expect this to be part of the discovery and planning phase.

Question 16
Question: How do you expect to plan and estimate the effort for the Strategic Initiative (system expansion, workflow optimization, reporting and analytics, citizen portal enhancements, integrations, training and support and scripting standardization and organization?
Response: We expect the planning and estimation for the Strategic Initiative to be a collaborative effort between the vendor and our internal teams. The selected vendor will be expected to lead a structured discovery and planning phase where they will engage with the business to gather and document detailed requirements, assess current-state capabilities, and identify gaps. From there, we anticipate the vendor will provide their best estimates on development time based on the gathered information, complexity and resource needs.

Question 17
Question: For QA and UAT Requirements and Expectation do you have samples of the test plans, scripts and issue logs and change over reports or would we use our own templates?
Response: We will collaborate closely with the vendor to develop and finalize test plans, scripts, issue logs, and changeover reports, ensuring it holds up to our standards.

Question 18
Question: We would also like to request a 1 to 2 week extension to the due date.
Response: We will not be extending the due date. Reference page 12 of the RFP.

Question 19
Question: I scanned the RFP document to check for an evaluation % for the M/W/D/EBE criteria but didn't find it. Can the City please share the %?
Response: Evaluation scores are based on points. M/W/D/EBE is weighted at 10 points out of a total 100 points.

Question 20
Question: A submittal date by which all questions are due in to the city?
Response: All questions are due by June 13, 2025

Question 21
Question: The RFP references a Price/Costs form on P19. This form does not seem to be included. Would the city please provide instructions on where this form can be found?
Response: The Price/Cost form in the RFP can be used to insert your pricing or a separate pricing form can be utilized.

Question 22
Question: Is the city expecting a fixed bid for this project?
Response: Yes, the city is expecting a fixed-price bid for this project.

Question 23
Question: Referencing RFP 25-30 with Evanston, IL on page 44 item F, it says that consultant certifies that it is properly formed and existing legal entity, and as applicable, has obtained an assumed name certificate from proper authorities, or has registered to conduct business in Illinois, and is in good standing with the state of Ill. We are a Colorado Corporation in good standing. Does that meet these requirements or do we still need to register with the state of IL. And get an assumed name certificate?
Response: All proposals are accepted.
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Question 24
Question: If the city has any other specific requirements for us as a Colorado Corporation, we would ask that they provide that information.
Response: All proposals are accepted.

Question 25
Question: Is a transcript available for the Pre-proposal meeting that was held Friday, June 6th?
Response: No, the Pre-proposal meeting was not transcribed however the presentation is available.

Additional Information

Pre-proposal agenda

Note: Acknowledgment of this Addendum is required in the Proposal.

Civic Platform Upgrade II

Non-Mandatory Pre-Proposal Meeting

City of Evanston
RFP 25-30

June 06, 2025

City of **Evanston**™

Community Development

Agenda

- 9:30 AM   Welcome and Introductions - Linda Thomas, Purchasing

                       Overview of the RFP Process - Linda Thomas, Purchasing

- 9:35 AM   Project Background and Goals - Linnea Latimer, Project Manager

                       Scope of Work and Deliverables - Sarah Flax, Executive Sponsor

- 9:40 AM   Departmental Overview & Expectations

                           Building and Development - Andrew San Roman

                           Planning & Zoning - Elizabeth Williams

                           Fire - Anthony Yee

                           Public Works - Jason Krohn and Angela Levernier

                           Economic Development - Katie Boden

                           Health and Human Services - Hiran Bhatt

- 10:10 AM   Q & A - Open Forum for Vendor Questions

- 10:30 AM   Next Steps and Closing Remarks - Linda Thomas, Purchasing

Overview of the RFP Process

Evanston at Night

Project Background and Goals

- Since 2008, the City has been using Accela Civic Platform.

- In 2012, Civic Platform was updated to cloud services (SaaS).

- In 2022, comprehensive updates were rolled out for the Building, License, Property Standards, and Public Works modules.

- Post 2025, the City seeks to further enhance Civic Platform for existing and new modules.

- The goal is to optimize the Accela system and existing workflows, integrate additional departments and services, enhance reporting capabilities, and improve overall user experience for city staff and applicants.

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Community Development

Scope of Work and Deliverables

The scope of services include the **design, standardization, and implementation of scripts, configuration, training and support of pageflow, workflow, records, and reports** related to Civic Platform and Citizen Portal for the following modules, plus **integration** for the following services:

1. Building
2. Health
3. Licenses
4. Property Standards
5. Public Works
6. Zoning
7. Fire

1. Laserfiche
2. Google Calendar
3. Payment Processing System
4. GIS
5. Granicus

City of
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Community Development

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- **10:25 AM** Next Steps and Closing Remarks - Linda Thomas, Purchasing

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Community Development

Building and Development

Building and Development manages permits related to construction, renovation, and property management.

Property Standards ensures rental properties are registered, comply with health and safety standards, and that building projects meet code requirements and are safe for occupancy.

Some responsibilities include managing or processing:

- Commercial and residential building permits
- Express permits for minor projects
- Contractor registration and renewals
- Inspections
- Plan reviews
- Enforcements
- Annual rental property registrations, shared-housing, vacant building, and short-term rentals
- Routine and compliant-based inspections
- Enforcement of property maintenance codes

Building

- Inspection scheduling in CP
  - Google Calendar integration
- Payment adapter integration
- Inspection checklist in CP, with codes pre-programmed (similar to existing Property Standards checklists)
- Dig-e-plan capability for every record type
- Updated GIS info
- Laserfiche integration?
- Possible to communicate with New World?
- Send documents/reports through CP
  - Save sent documents/reports automatically in Documents tab

Property Standards

- Host Compliance and OpenForms integration
- Google Calendar integration
- Updated GIS info
- Workflow adjustments
- Send inspection reports through CP
  - Save sent reports in Documents tab of CP
- Making mobile app less cumbersome, or more similar to web application
- Form scaling in the mobile app needs to be adjusted

Planning & Zoning

Planning and Zoning manages land use applications and zoning compliance within a structure of defined districts, each governed by specific regulations.

Key applications include:

- Zoning analysis
- Zoning variations
- Special use permits
- Planned development
- Text / Map amendments

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Community Development

Planning & Zoning - Current Status

- Four record types
  - Plan Development, Zoning Analysis/Certificate, Minor Variations, Major Variations

- Applications are collected via Formstack and PDF

- Workflows, status, and custom fields do not mirror business practices

- Manual record creation and document upload

- Plan review and correspondence with customer done outside of permit software.

- Reports/Documents do not consistently generate and require significant manual manipulation

- Payment processing is manual and not integrated in workflows

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Community Development

Planning & Zoning - Overview of Updates

- All applications added to ACA - Citizen Portal

- Update existing case/record types to align with business operations

- Develop new case/record types (out of the box Planning module or custom) to align with business operations

  - Special Use, Text/Map Amendments, Administrative Reviews, Appeal, Minor/Major Adjustment to a Plan Development, Subdivision

- Ability to auto assign staff to specific workflow steps with specified due dates (reviews, codified deadlines, internal deadlines, etc.)

- Integrate workflows with DigEPlan

- Ability to create "triggers" for applicant & reviewer notifications

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Community Development

Planning & Zoning - Overview of Updates

- Ability to create folders within "documents" tab & select one or multiple

- Ability to view documents publicly as determined by the reviewer

- Correspondence sent and tracked in the system

- Generate review letters, certificates, determinations and other template correspondence

- Generate reports to track service delivery and workload based on custom fields throughout the module based on business requirements

- Integrate payment processing into workflow

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Community Development

Fire

The **Fire Department** oversees several permit and registration processes to ensure safety and compliance. Key functions include:

- Installation or modification of fire sprinkler systems
- Fire pumps
- Standpipe systems
- Fire alarm and detection systems
- Kitchen hood suppression systems
- Fire/Burglar Alarm registration
- Fire backflow (CCCD Permit)

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Community Development

Public Works

Public Works oversee several permitting processes to ensure public safety, infrastructure integrity, and compliance. Responsibilities include managing or processing:

- Right-of-Way (ROW) permits
- Moving Vehicle and Storage Container permits
- Tree Preservation Permits (Public and Private)
- Small Cell Wireless Permits
- Sidewalk Cafe Permits
- Block Party Permits

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Community Development

Economic Development

Economic Development administers business licenses for all operations within the city limits, including home-based businesses. Licences are typically subject to annual renewal. Key function include:

- Business license processing and renewals

Health and Human Services

Health and Human Services regulates public health-related permits and licenses, particularly for food establishments and special events. Key areas include:

- Food-related licenses and permits, plus renewals
- Health and safety compliance
- Seasonal and temporary events permitting
- Inspections
- Plan reviews

Community Development

Q & A - Open Forum for Vendor Questions

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Community Development

Next Steps and Closing Remarks