



Civic Platform Upgrade II

RFP #25-30

ADDENDUM No. 2

June 17, 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 eleven (11) 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. 2

June 17, 2025

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

Questions Received:

Question 1

Question: What functionality is being requested for the Granicus integration?

Response: The request is to have applications submitted via Granicus (Open Forms) automatically transferred into Civic Platform. These applications may include documents such as the application form, floor plan, evacuation plan, proof of residency, vacation rental listing, and other attachments. Once in Civic Platform, the application should support inspection scheduling and follow the workflow for annual licensing, similar to residential rental registrations. The integration should also enable data reporting, status tracking, and access to property and inspection information within Civic Platform.

Question 2

Question: Are Laserfiche and Granicus new integrations?

Response: Laserfiche and Granicus are not new systems to the City, but their integration with Accela is new and will need to be configured as part of this project. Laserfiche is used for document management and archival. Laserfiche integration with Accela will be configured to automatically archive finalized document and ensure proper metadata tagging and folder structure. Granicus integration is described in Question 1. The consultant will help design and implement the integration points between Accela and both Laserfiche and Granicus, ensure data flows and security protocols align with City IT policies, and test and validate that records and communications are processed correctly.

Question 3

Question: Does the City have a pricing format they would like to see?

Response: The City does not have a rigid pricing template, but expects vendors to submit a clear, structured fixed-fee pricing proposal that aligns with the scope and deliverables described in the RFP.

Question 4

Question: Does the City know how many new record types are needed?

Response: The City anticipates the need for a total of approximately 35 to 40 new record types across various departments. Zoning includes 10 new planning-related records. Fire, includes five to six new records and contractor registrations. Health, includes 15 to 18 new records, some are license-related with annual renewals. Public Works includes three to four new records. Property Standards, includes one new records. Final record types will be determined during the discovery phase of the project. The City will work with the consultant to validate needs, configure workflows, and identify any share or reusable record types where appropriate. Any additional records identified after discovery will be addressed via change order if out of current scope.

Question 5

Question: Is the City looking to replace its current payment processor or enhance an existing integrations?

Response: The City is not currently looking to replace or enhance any payment processor integration as part of this project. Although payment integration was included in the initial RFP, the City has since decided that payment system integration is out of scope for this implementation phase. As such, there is no active or planned integration with a payment processor at this time.

Question 6

Question: As the scope of work is given in approximations, does the City have an estimated number of resources in mind for the 11-month project?

Response: Given that the scope of work is based on approximations (e.g., 35 to 40 new record types, multiple departments, new module builds, ACA, dashboards and DigEplan configurations, multiple integrations), the City has not defined a fixed number of consultant resources at this time. However, the City anticipates that the complexity and breadth of the work will require a multi-disciplinary team from the consultant side to successfully complete the project within the 11-month timeline. While final staffing will be proposed by the consultant, the City anticipates the need for roles such as Project Manager, Accela Functional Consultant, Technical Consultant/Developer, and relevant specialists for implementation needs. The City expect the consultant to propose the appropriate level of staffing based on their understanding of the scope, timeline, and dependencies.

Question 7

Question: For Exhibit J (Consultant Certification and Verification): “We noted that the form in Exhibit J is outdated and references previous COVID-19 and OSHA standards. Could you please provide an updated version of this form?”

Response: The version of Exhibit J is the most current and will need to be signed as requested.

Question 8

Question: For Exhibit G (M/W/D/EBE UTILIZATION SUMMARY REPORT): “Regarding Exhibit G, the form requests ‘amounts of money paid to each date,’ which is not applicable for a new project proposal. We plan to report the anticipated utilization for our M/W/D/EBE partners. Please confirm if this is the correct approach.”

Response: Exhibit G (M/W/D/EBE UTILIZATION SUMMARY REPORT): this form is a summary of Exhibit G M/W/D/EBE Participation Compliance Form. List subcontractors, the amount of their portion of the project and the percentage of the total cost.

Question 9

Question: For Exhibit F (M/W/D/EBE POLICY): “In reviewing Exhibit F, we noted the 25% goal for software services. As the services required for this project are highly specialized, requiring formal training and experience, we would like to inquire if the City would consider re-evaluating the goal to a different percentage, such as 15%, or provide further clarification on how this goal applies to this specific RFP.”

Response: The City will not consider a reduced percentage for the M/W/D/EBE goal. Refer to Exhibit F for clarification.

Question 10

Question: What is the City expecting in the pricing response since that is a fixed fee yet still undefined. Is the City looking for an estimate on what can be done in the 11-month timeframe?

Response: The City is requesting a fixed-fee pricing response for this project, even though some scope elements are still defined in approximations. The City understands this presents some variability and therefore expects the pricing response to reflect what deliverables and configurations can be reasonably completed within the 11-month project period, a breakdown of assumptions about the scope (e.g., number of record types, number of departments, ACA/DigEplan and dashboard configuration, integrations), a work plan or phased schedule that shows how those deliverables will be completed within the timeframe. If the consultant believes certain parts of the scope cannot be completed within the 11-month timeframe under a fixed fee, they should clearly define what is in scope and identify any items that would be out of scope. The City expects the pricing proposal to include a resource plan and level of effort, assumptions and exclusions, a description of the consultant’s change order process for managing additional scope or time. The City values transparency and encourages vendors to clarify any risks or constraints in the pricing approach.

Additionally, the City is open to extending the project timeframe through a formal change order process, if needed.

Question 11

Question: Would the City consider a rate card/time and material for anything that falls out of scope (not within the RFP)?

Response: No, the City will not consider a rate card or time-and-material approach for work that falls outside the scope defined in the RFP. Any additional work beyond the fixed-fee scope must be handled through a formal change order process which will include a clearly defined scope of additional work, a mutually agreed-upon fixed fee or adjustment, approval by the City before work begins.

Question 12

Question: Do all parts of Exhibit J, including the Consultant Certification and Verification and the City's Professional Service Agreement, need to be returned with the Professional Service Agreement Acknowledgement page, or does the City want just the signature page (first page) at this time?

Response: All Exhibits that require a signature must be signed and included in your proposal.

Question 13

Question: In lieu of a fixed fee agreement, can vendors provide a time and materials quote, with hourly rates for specific roles to be approved by the City, without committing to specific work scope or total project cost upfront? Before any work begins, we would work with the City to define a specific scope of work for a particular phase or deliverable and provide a Work Order Authorization with estimated hours and cost based on the preapproved hourly rates.

Response: No, the City is not accepting time and materials proposals in lieu of fixed-fee agreement for this project. The City requires a fixed-fee pricing structure that reflects the deliverables described in the RFP and the City's estimated scope (e.g., 35 to 40 new record types, ACA expansions, integration, etc.) The City understands the scope contains approximations and expects vendors to propose what can reasonably be delivered within the 11-month timeline, clearly state assumptions, exclusions, and limits, and address any necessary adjustments through a formal change order process.

Question 14

Question: How many records need to be revised or added for planning? (Please provide a list of record names). The presentation shows 4 records, are these the only ones requiring updates? Is the list of items on the slide 7 for planning the full list of the types of changes required?

Response: Approximately 14 records are currently identified for planning: 10 new records to be created and 4 exiting records to be modified. Specific record names have not yet been determined. We will rely on the consultant to help guide the configuration and definition of these records as the process evolves. The current list is not finalized. The record requirements for

planning are subject to change, particularly due to an ongoing zoning ordinance revisions. Consultant input will be essential to advise on best practices for record structure and configuration. The context of the above mentioned slide represents the current known scope, with room for evolution based on further discovery and ordinance updates.

Question 15

Question: How many records are required for health? (please provide a list of record names). Page 23 of the addendum shows 5 record types, is that the list that need to be configured?

Response: 15 to 18 records are anticipated for the Health module. A specific list of record names has not been finalized. The 5 record types likely represent examples or initial priorities, not the full scope. The final list of records will be refined before development, with the consultant support. Configuration will be aligned with operational needs and any regulatory or departmental requirements.

Question 16

Question: Page 23 reference license and renewals. Is business licensing required for health and is there a list of license types and which ones have renewals available?

Response: Business Licensing is managed independently from Health. However, some Business License workflows may include Health reviews as part of the approval process. The Health department issues 13 license types, all of which require annual renewals. At this time, a detailed list of license types is not yet available. The consultant will be responsible for advising on the structure and classification of Health License types and recommending best practices for renewal workflows, dependencies, etc. (e.g., with inspections or other departments like Business Licensing).

Question 17

Question: How many records are required for Fire? (Please provide a list of record names). Page 20 of the addendum shows 7 record types, is that the list that need to be configured?

Response: The Fire module does not currently exist in the system. This module will require the most attention during implementation due to the need for new, end-to-end configuration. The Fire department currently registers contractors manually or outside the system. A new process will need to be created for front-end, contractor application, updates, and renewals and back-end, staff workflows for review, approval, license/id generation, and tracking. Automation opportunities include notifications/reminders, status updates, inspections (if applicable). The Fire department currently processes 5-6 permit types (not yet named). Full configuration is needed to support front-end, public-facing applications, document uploads, fee payments and back-end, review workflows, inspections, fee assessments, approval, issuance, and expiration tracking. Consultant input will be essential to define permit types and their unique fields/workflows, build automation, and ensure proper reporting and data structure for compliance tracking. The project team will rely heavily on the consultant to

recommend best practices for fire permitting and contractor management, guide decisions on data structure, workflows, and automation, and ensure alignment with agency goals, code requirements, and interdepartmental integration.

Question 18

Question: Are any additional enforcement case types required to support the programs?

Response: No additional enforcement case types have been identified at this time to support any programs. However, should additional enforcement case types be identified during discovery or implementation, the additional scope will be addressed through a formal change order.

Question 19

Question: Have you implemented any dashboards using Accela insights and would that be in scope for the strategic initiatives?

Response: No dashboards using Accela Insights have been implemented to date. Dashboard development is in scope for this project and is expected to support the City's strategic initiatives, including operational visibility, performance tracking, workflow optimization, department-level reporting. The project team will rely on the consultant to provide guidance on the capabilities of Accela Insights, help identify meaningful use cases for dashboards based on departmental needs, and configure and optimize dashboards to align with agency goals.

Question 20

Question: What additional optimizations and configuration needs to be done for DigEplan? Is it in DigEplan or Accela or both?

Response: DigEplan is integrated with Accela, but additional configuration is needed to fully support departmental workflows. Specific focus is required for Health (full configuration needed), Fire (full configuration needed), Building (configuration is in place but requires adjustments). Scope of configuration may include link record types and workflows (Health, Fire, and Building) to DigEplan plan review stages, adjust automation for routing to DigEplan at appropriate workflow milestones, ensure document types and intake rules align with DigEplan expectations, or map plan review results back to Accela status updates and record history. The consultant will be expected to lead configuration of DigEplan for Health and Fire from the ground up, review and optimize the existing Building configuration, and ensure integration and automation between DigEplan and Accela is working efficiently for all three departments.

Question 21

Question: Is a payment interface already configured for your payment provider or does one need to be setup? What payment provider do you use?

Response: No payment interface is currently configured in the system. While integration with a payment provider was originally included in the project scope (as noted in the RFP), the project team has since decided to remove payment system integration from scope.

Question 22

Question: Is the ACA portal used now for entry of applications or scheduling or inspections etc.?

Response: The ACA portal is currently in use for public-facing services for Building, Property Standards, Business Licensing, and Public Works. The current functionalities include application submission, inspection scheduling, and basic record tracking. As part of this project, the City intends to expand ACA functionality to include Health and Fire departments. Plus, additional capabilities such as creation of new public-facing application intake forms, enhanced inspection scheduling and record look-up. The City will reply on the consultant to evaluate existing ACA configuration, recommend best practices for expanding ACA across departments, help design user-friendly, accessible intake forms, ensure ACA processes are seamlessly integrated with internal workflows and automation.

Question 23

Question: Can the City confirm whether all Accela Civic Platform licenses required for this project (including any new module such as Fire and Tree Preservation) have already been purchased?

Response: The City has already purchased the necessary Accela Civic Platform licenses to support this project with one exception, Fire. The Fire module license has not yet been purchased. The City plans to acquire it in alignment with the implementation schedule. The Tree Preservation record will be managed under the exiting Public Works module and do not require a separate license. Licenses for Planning (Zoning), Building, Health, Property Standards, License, and ACA are already in place.

Question 24

Question: If not, will the City be handling all coordination and purchasing of additional Accela modules or user licenses directly through their existing Accela agreement or previous reseller, or should vendor anticipate assisting with scoping and/or license recommendations and pricing?

Response: The City will handle all coordination and purchasing of any additional Accela modules or user licenses directly through its existing Accela agreement. This includes the Fire module license, which the City plans to procure separately during implementation. While the City will manage procurement, the vendor may be asked to provide input during discover to help confirm licensing needs based on finalized configuration plans and make recommendations regarding user roles and module functionality. However, the vendor is not expected to handle procurement or pricing negotiations directly with Accela or resellers.

Question 25

Question: Given that current GIS data is from 2009 and GIS updates are noted as a priority in multiple modules, with the City provide refreshed and validated GIS layers (including parcel, zoning, and ownership data)? If not, should vendor include time for reviewing and assisting with data preparation and cleanup?

Response: The City recognizes the importance of updated GIS data across multiple modules (e.g., Planning (Zoning), Health, Building, and Fire). The current GIS layers (address, parcel, and owner) are outdated, with the last full update from 2009, and the City is working toward providing refreshed and validated data during the project. The City is seeking expert guidance from the consultant to help determine the best GIS configuration strategy, including whether to use Accela's standard GIS layer configuration or enable GIS auto-update functionality. In coordination with the City's GIS and IT team, the consultant's expectations are to evaluate current and planned GIS data sources and formats, recommend a GIS configuration approach that balance automation, performance, and maintainability, and assist with testing, and validating GIS layer behavior within Accela.

Question 26

Question: In the Building module discussion during the pre-proposal meeting, there was a reference to potential communication with New World software. Can the City clarify whether New World is expected to be integrated with the Accela Civic Platform as part of this project? If so, please describe the intended use case (e.g., financial data exchange, permit fee sync, inspection reference, etc.). If this is not part of this project scope and was only mentioned for future consideration, please confirm.

Response: The City does not require integration with New World as part of this project, now or in the future. New World serves as the City's financial management system, but financial data from Accela Civic Platform will be reported to New World exclusively through the payment processing system. There is no expectation for the consultant to design or implement any direct interfaces with New World in this project.

Question 27

Question: We understand that DigEplan is currently used in the City's Accela Civic Platform environment, particularly within the Building module. Can the City clarify if the extent to which DigEplan is currently configured and functioning across other departments (e.g., Planning (Zoning), Fire, and Public Works)? Additionally, should vendors expect to support expansion of DigEplan integration including configuration of additional record types, pageflows, workflow tasks, or triggers for departments that do not yet utilize it fully? If so, will the City provide a prioritized list of records or modules that should be targeted for plan review integrations?

Response: DigEplan is currently configured and actively used primarily within the Building module of the City's Accela Civic Platform environment. At this time, DigEplan is not fully configured or utilized in other departments, such as Health and Fire. Vendors should expect to support the expansion of DigEplan integration to additional departments including but not limited to configuration of new record types, setup of pageflows, development of workflow tasks and automation triggers, support for department specific plan review processes. Additionally, review and optimize the existing Building configuration. The City will provide a prioritized list of records and

modules that are targeted for DigEplan plan review integration during the project kickoff and discovery phases.

Question 28

Question: For departments using spreadsheets and Word (e.g., Health licenses and renewals), does the City want the vendor to migrate existing data, or only configure Accela for future tracking?

Response: For departments currently using spreadsheets, Word documents, or other manual tools, the City's expectation is to configure Accela for future tracking and management. Data migration of historical records is not required as part of this project scope. Vendors should focus on configuring Accela to manage licensing, renewals, inspections, and related workflows and ensuring the system is ready to accept new applications and renewals. If future data migration is requested, it will be handled through a formal change order.

Question 29

Question: Should Formstack/OpenForms-based workflows be fully replaced in Accela, or will those tools remain active and require integration?

Response: The City's intention is to fully replace Formstack, Wufoo, and .pdf forms with native Accela functionality where feasible. These third party tools were used to support application intake and simple workflows, but as part of this project, the goal is to retire or phase out those external forms and recreate their functionality directly with Accela, particularly through ACA public intake forms and internal workflows. Vendors should plan to rebuild or replace any critical Formstack or similar form processes with Accela and work with departments to ensure a smooth transition. Integration with Formstack or similar forms is not expected or required as part of this implementation.

Question 30

Question: Is the City currently using the Accela Classic Mobile app, Accela Mobile 2.0, or CityGov? Several departments mentioned mobile scaling and UX issues.

Response: The City is currently using the Accela Mobile app version 25.2.0. Accela Classic Mobile, Accela Mobile 2.0, and CityGov are not in use. Multiple departments have report user experience and mobile scaling issues, including difficulty with layout and screen responsiveness, navigation challenges on mobile devices, and limited functionality or inconsistent performance in the field. The City expects the consultant to evaluate the current mobile configurations, recommend improvements to optimize mobile workflows, forms, and UI for field staff, identify whether additional mobile module or updates should be configured, and ensure any new or updated record types are applicable.

Question 31

Question: How many internal staff will participate in UAT, and should the vendor plan to lead or co-lead testing sessions? Should UAT include hands-on training, or is the City planning to handle training internally?

Response: The City anticipates approximately 15 to 20 internal staff will participate in UAT, with each department or module owner responsible for testing their own requirements. System-wide items will require coordination between the City and vendor to ensure consistent behavior across all affected areas. The vendor is expect to participate in UAT but will not lead the overall testing effort. The vendor's responsibilities include providing support and clarification during testing sessions, troubleshooting and addressing issues that arise, and offering input on testing scenarios. For new functionality, the vendor is expected to provide targeted training and provide documentation to support testers and end-users. For existing functionality, the City will manage training internally.

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