City of Kingston
Report to Council
Report Number 14-220

To:	**Mayor and Members of Council**
From:	**Lanie Hurdle, Commissioner, Community Services**
Resource Staff:	**Sheldon Laidman, Director of Planning and Development**
Date of Meeting:	**June 17, 2014**
Subject:	**Award of RFP Number F31-CS-PD-2013 Land Management System**

Executive Summary:

At its regular meeting on March 19, 2013, Council approved Report Number 13-118 'Mayor's Task Force on Development Implementation and Service Improvement Plan', which included specific direction to address:

- Development review and building services processes that result in measureable customer service improvements; and
- File management, information access and information systems to support development review and building services.

The purpose of this report is to seek Council approval to award a contract to Accela Inc. to implement and support a Land Management System (LMS) that will support the City's goal of enhancing customer service delivery throughout the development review process, performance measurement, improved information and technology access/process documentation and streamlining of associated processes.

The submission from Accela Inc. for the Accela Automation system received the highest ranking and demonstrated the highest overall value and best fit to the City's envisioned solution for Planning and Permitting, Customer Portal, Mobile Computing, Electronic Plans Review, GIS Integration, Usability, Administration and Technical Architecture.

In accordance with By-Law 2000-134, A By-Law to Establish Purchasing Policies and Procedures, Council approval is required to award a contract that will exceed $50,000.00, where the successful proponent is not the lowest price.

Recommendation:

THAT RFP Number F31-CS-PD-2013-3 'Land Management System' be awarded to Accela Inc. to implement and support a Land Management System at a cost not to exceed $1,195,000.00 excluding HST; and

THAT annual initial software support and maintenance expenses, estimated at $58,300.00 plus annual increases, be covered through the Land Management System capital budget and that ongoing expenses be included in future Planning and Development and Building and Licensing operating budgets; and

THAT Council authorize the Mayor and Clerk to execute a contract with Accela Inc. for the provision of a Land Management System for the Planning and Development and Building and Licensing Departments, in a form satisfactory to the Director of Legal Services; and

THAT Accela Inc. be confirmed as a "vendor of record" for the purpose of acquiring additional Land Management System user licenses, software modules, and implementation services to extend the capability of the Land Management System to other City Departments and Utilities Kingston; and

THAT the Chief Information Officer (CIO) be authorized to enter into recurring maintenance and support agreements with Accela Inc., subject to annual review and in a form satisfactory to the Director of Legal Services.

Authorizing Signatures:

ORIGINAL SIGNED BY COMMISSIONER

Lanie Hurdle, Commissioner, Community Services

ORIGINAL SIGNED BY CHIEF ADMINISTRATIVE OFFICER

Gerard Hunt, Chief Administrative Officer

Consultation with the following Commissioners:

Cynthia Beach, Corporate & Strategic Initiatives	Not required
Denis Leger, Transportation, Facilities & Emergency Services	Not required
Jim Keech, President and CEO, Utilities Kingston	Not required

Options/Discussion:

The Implementation and Service Improvement Plan: Mayor's Task Force on Development consists of several recommendations to be addressed by staff, including:

1. Improve Communications Relative to Development Review and Building Services Provision.
2. Establish a more robust team approach to development review, clarify the Planner's role and ensure that dedicated resources are in place in all City Departments involved in development review.
3. Improve management and governance relative to development.
4. Improve Development Review & Building Services processes to Improve Customer Service.
5. Improve file management, information access and information systems to support development review and building services.

The procurement of a comprehensive land management software solution allows staff to achieve the following goals established in the Service Improvement Plans:

- Re-engineer and enhance current manual processes and documentation and leverage technology and automation to improve processing times and to provide a coordinated and integrated approach to the delivery of services; and
- Monitor customer service performance standards for development review and application processing.

Automating Development Review and Building Services processes will also result in the ability to establish an online system for scheduling and tracking building inspectors and/or call centre to improve customer support.

Land Management System Requirements

The Land Management System (LMS) is a software solution that is designed to improve and optimize manual processes used throughout the development lifecycle at the City of Kingston.

In particular, the LMS will eventually be used to automate the following processes:

a) Inception: Provide land developers with more accurate and comprehensive information to assist in making decisions and simplify their development.
b) Pre-Application: Improve collaboration and visibility in the "pre-consultation" phase in which the developer submits a proposal for the City to review and provide feedback on the feasibility of the proposed development.
c) Application: The process in which a formal development application is submitted, fees are paid and the application is assigned to a planner for action and consultation with the community. Includes applications such as Official Plan Amendment, Zoning By-Law Amendment, Draft Plan of Subdivision, Draft Plan of Condominium, Final Plan of

Subdivision, Final Plan of Condominium, Site Plan Control/Modifications, Part Lot Control, Hold Removal, Security Reductions, Consents and Minor Variances.

d) Technical Review: The process in which the submission is circulated to various departments and external agencies to review and provide their feedback/comments regarding the development plan. Deficiencies can then also be addressed by the developer through the system.

e) Report Review: The process in which Managers and the Director review the report for issues before it is passed to the Commissioner and CAO for signing and then provided to the Planning Committee and Council.

f) Post Council Decision: The process in which notice is sent out based on the decision by Council and any necessary documentation is registered on title.

g) Permitting Application: The process in which a developer applies for a building permit to develop, alter or demolish a structure that adheres to the Ontario Building Code. If the development plan adheres to the code the plan is approved, fees are calculated, paid and the permit is issued.

h) Inspections: The process in which a City employee will go on-site and evaluate the development project based on a specific period of construction, document their findings and attach it to the record.

i) Compliance with Law: The process which ensures each development proposal complies with all applicable Federal and Provincial legislation and regulation, as well as Municipal By-Laws and also allows for the potential for amendment and change to the legal requirements under which development applications are processed.

j) Ancillary Requirement Identification: The process which ensures that other agreements, notices and requirements are identified that a developer must undertake to proceed with an approved development such as off-site agreements and approvals under the Ontario Heritage Act.

k) Assessment Growth and Revenue Projections: The development process supports a growing tax base. Assessment growth will be recognized on the tax roll once planning, construction and occupancy requirements have been completed. The benefits of data automation in the above processes will provide comprehensive date to assist in projecting the timing of assessment growth and future taxation revenues.

The selection of an appropriate Land Management System was preceded by a number of activities focused on establishing the requirements/specifications for file management, a tracking system and implementation including:

1. A review of the information requirements associated with development review including requirements to track applications through the development review process. Documentation of the categories of information that should be recorded for each application file;

2. A review of the information requirements associated with building services including the requirements to track applications through to closing of the building permit;

3. Identification of the system features which would be beneficial to supporting interdepartmental and agency coordination, submission and access to comments, and

advance notices when time deadlines are approaching. Consideration to staff, applicants and general public;

4. Identification of document management requirements relative to the digital recording, storage and access to documents; ensuring that policies are in place for information management and storage in coordination with the City's corporate file/data manager;
5. Establishment of the desired features and requirements for a web-based system to provide applicants with access to monitor the status of their applications online and to provide for the online submission of development applications, drawings and reports; and
6. Integration of the City's Enterprise GIS capabilities with the LMS to support development.

Land Management System Selection

On November 22, 2013, the City issued a Request for Proposal (RFP) F31-SG-PD-2013-3 to acquire a solution to support recommended process improvements to development approvals, permitting and inspections, and customer service. The RFP included requirements for software, implementation services and ongoing maintenance and support of the LMS solution.

The RFP closed on January 15, 2014 and four submissions were received from:

1. Accela Inc. (Accela Automation)
2. CityView
3. Computronix (POSSE)
4. CSDC (Amanda)

An evaluation team comprised of representatives from Planning & Development, Building & Licensing, Engineering and Information Systems & Technology (IS&T) was established to review and determine the best overall submission based on the requirements outlined in the RFP. A Steering Committee comprised of the Directors of Planning & Development, Buildings & Licensing and IS&T provided oversight and guidance to the evaluation team. A Corporate Buyer was included during the evaluations to provide guidance and to ensure compliance with the Purchasing By-Law.

A two-stage evaluation process was used to select the recommended proponent. In the first stage, the evaluation team reviewed submissions for compliance with the City's mandatory and rated requirements to identify a short-list of three (3) Proponents for further evaluation. The second stage of the review consisted of reference checks and two day demonstrations by each Proponent to the evaluation team and a panel of potential users, stakeholders and IS&T staff. The evaluation team then reviewed the scores from stage 1 and made revisions, where applicable, based on the results of the demonstration and findings from the reference checks. Recommendations from the evaluation team were reviewed and approved by the Steering Committee.

The following table provides a breakdown of criteria and weighting applied in the evaluation of proposals.

Criteria	Weight
Company Profile and Experience (corporate plus projects of similar scope, project team, technical knowledge, references)	15%
Solution, Product Offering and Fit	40%
Project Execution Methodology and Plan	12%
Accessibility for Ontarians with Disabilities Act Adherence, s.C.3	3%
Financial Proposal	30%

Analysis of financial proposals submitted by each proponent included a 5-year projection of hardware, software, implementation services and support/maintenance, resulting in the following projected costs that were used to evaluate/score the price component of the project.

Accela	$1,233,504
CityView	$838,642
Computronix	$1,896,650
CSDC	$1,569,326

Staff completed the Stage 1 Evaluation at the end of March, 2014, resulting in the selection of a short-list of the three top-ranked proposals (Accela, CityView and CSDC). Computronix, as the fourth ranked proposal, was eliminated from further evaluation due to the significant gaps in functionality and pricing as compared with the other proponents.

In April 2014 the short-listed proponents participated in demonstrations of their proposed solution to the evaluation team, as well as a group of stakeholders from Planning and Development, Building and Licensing, Engineering, Legal, Finance and IS&T. Reference checks were completed and the scoring was amended based on the findings and results of the demonstrations and references.

The table below represents the evaluation team scoring after the Stage 2 Evaluation was completed.

Criteria	Proposal		
	Accela	CSDC	CityView
Company Profile, Key Personnel, Experience & Client References (15%)	9.0	10.0	7.0
Solution, Product Offering & Fit (40%)	33.0	26.0	17.5
Project Execution Methodology and Plan (12%)	7.0	10.0	4.0
Price (30%)	20.4	16.0	30.0
Accessibility (3%)	1.8	1.2	1.8
TOTAL (100%)	**71.2**	**63.2**	**60.3**

The evaluation team determined Accela Inc. to be the top-ranked solution, displaying an innovative and user friendly product that provides the City with the highest overall value and best fit for the City's envisioned LMS solution. The web based solution proposed by Accela renders a comprehensive customer portal that focused on simplifying land development with the City. Strong GIS integration will provide customers and users a myriad of information in a spatial format and the ability to leverage information from the City's Enterprise GIS program. Integration with Adobe Professional provides a familiar and intelligent e-Plan review solution for plan mark-up and comparing multiple submissions. A powerful back-office management system provides features that will facilitate efficiency, visibility, transparency and communication. The Accela mobile solution will not only benefit building officials in the field but also other City staff that perform duties in the field that contribute to the development approvals process.

The City of Kingston Project Manager and Analysts will work closely with Accela in the early stages of the project to establish strong quality assurance, change management, communication and risk management plans to ensure a successful implementation and to mitigate risk.

Existing Policy/By-Law:

By-Law 2000-134, A By-Law to Establish Purchasing Policies and Procedures

Notice Provisions:

Not applicable

Accessibility Considerations:

The proposed Land Management System will accommodate for persons with disabilities under applicable law for this specific project. The portal-based applications must comply with Web

Content Accessibility Guidelines (WCAG) 2.0, Level A by 2014 and WCAG 2.0, Level AA by 2021.

Financial Considerations:

There is approximately $1.5 million in the 2014 Council approved Planning and Development capital budget which covers the cost of the purchase, implementation and the initial maintenance expenses. Ongoing maintenance costs will be included in future operational budgets.

Contacts:

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Other City of Kingston Staff Consulted:

Desiree Kennedy, City Treasurer
Julie Salter-Keane, Manager of Development Approvals, Planning and Development
Marnie Venditti, Senior Manager of Client Development and Development Services
Terry Willing, Director, Building and Licensing Department
Del Stowe, Manager, Building Services, Building and Licensing Department
David Johnston, Chief Information Officer, Information Systems and Technology Department
Stephen Skinner, Manager, Corporate Integration, Information Systems and Technology Department
Janis Morrison, Purchasing Coordinator, Financial Services Department

Exhibits Attached:

Not applicable