

TO: MAYOR & COUNCILLORS
FROM: DEPUTY CHIEF ADMINISTRATIVE OFFICER AND CHIEF FINANCIAL OFFICER
SUBJECT: **CA – ENTERPRISE CONTENT MANAGEMENT PLATFORM**
PURPOSE: To obtain Council approval for a Contract Award (CA) for the Enterprise Content Management Platform.

RECOMMENDATION

THAT a contract award to StoneShare Inc. for an estimated total cost of \$1,313,900.00 including GST in the amount of \$62,500.00 and PST in the amount of \$1,400.00 as outlined in the report titled “CA – Enterprise Content Management Platform” dated for January 29, 2024 be approved; and

THAT final payment be based on the actual quantity of goods and services delivered and unit prices as submitted.

1.0 POLICY SECTION

The City’s Procurement Policy requires that contracts for goods, services and construction with values over \$1,000,000 be approved by Council following a competitive procurement process.

2.0 BACKGROUND

Following RFP #236-08-23 Enterprise Content Management Platform, four submissions were received by the closing time on October 4, 2023. Based on the RFP’s evaluation criteria consisting of the ability to meet or exceed functional requirements, qualifications and experience, methodology and work plan, costs and trainings and support during implementation, StoneShare Inc. received the highest overall scoring.

City staff have reviewed the submission for compliance with the terms of the Request for Proposal document and StoneShare Inc. has demonstrated the ability to provide the Enterprise Content Management Platform project. The Chief Information Officer concurs with this recommendation.

3.0 GENERAL INFORMATION

The current state of content and records management in the City is very typical of large organizations that have not yet undergone an enterprise digital transformation initiative focused on content and records management. Most staff leverage network file share folders for content storage and collaboration, although some groups may have department-specific line-of-business solutions where content is stored. Physical records management is facilitated by a mix of bespoke physical records management application, Excel spreadsheets, box submission, and recall portal provided by the City's offsite storage provider. The City does have a well-defined records classification system and retention schedule which can be leveraged for taxonomy development, solution design, and implementing records management and retention capabilities.

The City is currently doing an organization-wide clean-up of files and shared content over network files which involves record re-classification to meet the City's records classification system and retention schedule. As a next step, the City is preparing for digital transformation focused on establishing modern, best practice, compliant content and records management capabilities.

The scope of work for this contract includes:

- a) the implementation of a new Enterprise Content Management (ECM) Online Platform Solution using Microsoft SharePoint across the City to streamline collaborative document processing, provide better search capabilities, easily manage centrally diverse content, create content easily while keeping a consistent look;
- b) Migration of cleaned up shared content to ECM; and
- c) Implementation of Records management capabilities using Microsoft Purview to improve legal and regulatory compliance and help secure City's records. The solution will manage the capture, management, retention, and eventual disposition of records.

StoneShare Inc. will provide all the required configuration, testing, training, documentation, data conversion and migration, implementation, bug fixes during implementation and technical support to ensure a successful launch and seamless operation at the City during the term of the contract.

4.0 COMMUNICATION AND COMMUNITY ENGAGEMENT

The RFP #236-08-23 Enterprise Content Management Platform (Attachment 1) was publicly advertised. Upon closing, the City received a total of four submissions.

5.0 FINANCIAL CONSIDERATIONS

Funding for this capital work will be included in the 2024 – 2028 Financial Plan under Information Technology, Enterprise Content Management Project with a budget of \$3,398,100. This contract award has been accommodated under WBS element AEA.0039 (\$1,250,000).

Respectfully submitted,

Noreen Kassam, Deputy Chief Administrative Officer and Chief Financial Officer

ATTACHMENTS

Attachment 1 – RFP #236-08-23

REPORT CONTRIBUTORS

This report was prepared by Rafael Rojek, Senior Buyer, and reviewed by Sophan Lum, Senior Manager, Purchasing – Capital.