



Report to Council

Report Number: CL-18-2024

Subject: Procurement of Records Management System, Transition to SharePoint 2025

Date of the meeting: December 9, 2024

Prepared by: Aimée Roy, Clerk

Circulated to and/or collaborated with:

- Nadia Knebel, Treasurer

Approval: Pierre Leroux, CAO

In agreement with the recommendation based on the contents of this report.

Recommendation

[Be it resolved that Council approves the Clerk's Office request to single source the procurement of services from StoneShare (Digital Unity) to transition to SharePoint in 2025 pursuant to Section 6.7 (b)(v) of our Purchasing Policy (By-law 103-2024).]

Financial Considerations

Financial implications have been verified with annual budget and / or approved applicable policy or by-law:

- \$140,000.00 is included in 2025 budget (to be taken from reserves).

Context

In 2017, the municipality implemented a records management system (RMS), and in 2019, formally adopted the Ontario Municipal Records Management System (TOMRMS) as the official records management and retention policy. The existing RMS costs approximately \$20,000 per year but lacks support from UCPR IT services and does not provide the flexibility required to meet our increasing demands. Lastly, our current RMS system has limitations in fully integrating TOMRMS. As a result, the user experience can be challenging and requires staff to be well-versed in the comprehensive retention codes classification system.

According to our current Procurement Policy, for projects valued between \$50,000 and \$150,000, Department Heads may select a supplier after obtaining quotes.

Executive Summary

The administration recommends transitioning to Microsoft SharePoint, a platform covered under our existing Microsoft licenses and fully supported by UCPR IT services. To enable this transition, we recommend obtaining the services from StoneShare (Digital Unity) to oversee and coordinate the project. Their role will include assessing and configuring the system, migrating digital files from legacy locations to SharePoint, training users, and providing post-implementation support. Given budgetary constraints, StoneShare will prioritize the migration of files into the TOMRMS structure once SharePoint is configured to meet our specific requirements.

The Clerk's Office recommends pursuing a Single Source procurement for this service, given the provider's extensive experience with similar projects in Prescott-Russell and their specialized expertise with TOMRMS pursuant to Section 6.7 (b)(v) of our Purchasing Policy (By-law 103-2024):

“v. the required goods/Services are to be supplied by a particular Bidder having special knowledge, skill, expertise, or experience, which cannot be provided by any other person;”

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Benefits of Microsoft M365 Platform

Adopting the Microsoft M365 platform, including SharePoint, offers significant advantages:

1. **Enhanced Efficiency and Cost Savings:** Automation of manual tasks across all departments reduces costs and improves productivity.
2. **Improved Collaboration:** Enhanced communication tools and automated workflows foster inter-departmental cooperation and streamline processes.
3. **Workflow Optimization:** With StoneShare's expertise, we can incorporate TOMRMS seamlessly while adding functionalities for critical workflows, including accounts payable approvals, document approvals, records requests, complaints, inspections, work orders, expense claims, DocuSign integrations, and more.

Key Features of SharePoint Online (SPO) for Records Management

StoneShare's approach ensures that TOMRMS operates in the background, shielding employees from having to navigate complex retention codes. Instead, SharePoint sites and libraries will be tailored to fit familiar terms and workflows, simplifying the user experience. Additionally, this system enforces consistent security, privacy, and retention policies across all content, ensuring comprehensive compliance with regulatory requirements.

Project Scope and Timeline

The proposed transition would be completed within 24-32 weeks at an estimated cost of \$140,000.00. Key services provided by StoneShare will include:

- Project Planning and Management
- Departmental Consultations
- Current State Analysis and Recommendations
- Content Clean-Up Workshops
- System Design and Migration Planning
- Document and Records Management System Configuration
- Validation and Testing
- Departmental Onboarding (10 sessions recommended)
- Legacy Content Migration (Network Drives, MFiles)
- Training for Business Users, Records Managers, and Administrators
- Post Go-Live Support

Transitioning to SharePoint with StoneShare's support represents a strategic investment in operational efficiency, regulatory compliance, and modernized records management. This initiative would replace the current RMS with a sustainable, supported solution that better serves the municipality's needs.

Request to Single Source Services

StoneShare is highly regarded for its specialized expertise in integrating the TOMRMS records management system into Microsoft SharePoint. Their extensive experience with local municipalities and knowledge of municipal records requirements makes them uniquely qualified for this project. StoneShare's work includes successful implementations for multiple municipalities in the region, including:

- United Counties of Prescott and Russell
- City of Clarence-Rockland
- Township of Alfred & Plantagenet
- Town of Hawkesbury
- Township of Russell
- 4 of the 6 municipalities within SDG, as well as the County of SDG and City of Cornwall

Given their proven experience and familiarity with TOMRMS and local municipal needs, we recommend a single source procurement as per Section 6.7 (b)(v) of Purchasing Policy (By-law 103-2024) to procure services from StoneShare directly.

Complimentary Services

The following services are also offered, and Council may consider them for the years following the transition to SharePoint as part of a hybrid approach, where a specialized Archiving Clerk could be repurposed to include other duties.

- Quarterly Reports (19 reports – identify libraries missing retention codes, missing triggers, classification mismatches, misconfigurations etc.) - **\$7500 / year**
- Quarterly Reports + Quarterly Remediation (we address any issues identified in the reports) - **\$12,000 / year**
- Annual file plan updates (update Purview/SharePoint to the latest TOMRMS retention schedule on an ongoing basis) - **\$4,500 / year**
- Disposition Support (perform disposition activities on your behalf)- **\$6,000 / year**
- Full-service Bundle (all services together) - **\$19,500 / year**

Please note that StoneShare is not responsible for our physical archives (hard paper copies).

Relevance to priorities

This transition aligns with our compliance obligations under the *Municipal Act*, records management and retention by-law, and *MFIPPA*, supporting effective, secure, and compliant records management across the organization.

Communication Plan

N/A

Attachments

N/A