



Council Report

Report Number: PUR2022-025
Meeting Date: June 21, 2022
Title: 2022-71-SS Single Source to Upgrade to SharePoint Online
Author and Title: Ashley Wykes, Buyer
Chris Moncrief, Supervisor, Applications

Recommendation(s):

That Report PUR2022-025, **2022-71-SS Single Source to Upgrade to SharePoint Online**, be received;

That StoneShare Inc. be awarded the single source to upgrade to SharePoint Online in an amount of \$175,000 not including HST;

That subject to receipt of the required documents, the Mayor and Clerk be authorized to execute the agreements to award the contract; and

That the Procurement Division be authorized to issue a purchase order.

Department Head: _____

Financial/Legal/HR/Other: _____

Chief Administrative Officer: _____

Background:

The City currently uses SharePoint 2013 hosted on-premise which will be end of life in April 2023. This means there will be no more security patches, enhancements or support provided by Microsoft after this date. The City has spent the last few years moving our electronic documents to SharePoint to allow Records staff to manage the documents according to our records bylaw and retention schedules using our current records management system (TOMRMS). The Electronic Document Records Management System (EDRMS) solution was built by StoneShare using the SharePoint platform and Gimmel Records Management System. Each department is provided with their own SharePoint site or sites for file storage and document collaboration. Our EDRMS solution currently has hundreds of sites and thousands of documents which will need to be migrated to the latest SharePoint platform. Moving to the latest SharePoint platform will make sure we have support and the newest features/security patches available when they are released by Microsoft.

Rationale:

To date, StoneShare has worked with our EDRMS project team and staff to move the department's existing file shares to the SharePoint platform in order to utilize their EDRMS solution. StoneShare's knowledge of the departmental files and EDRMS solution are critical requirements in upgrading to the next SharePoint Platform to make sure we continue to follow our records by-law and retention schedules.

Other Alternatives Considered:

Council may opt to forego the approval of this single source and recommend a procurement document be released. This alternative is not being recommended as StoneShare has extensive knowledge of the City's current SharePoint system. Hiring another company could result in an increase and/or duplication of costs, including staff time. The length of the project would be extended in order for another company to review the City's content structure, which would involve City staff and resources that are already over extended.

Alignment to Strategic Priorities:

The implementation of SharePoint Online aligns with the strategic priority of "Good Government" as it will allow the City to continue to "Make It Better" in service areas, and provide a more streamlined process for records management.

Financial/Operation Impacts:

The budget for the implementation to SharePoint Online was approved in the 2022 capital budget as per the chart below:

Capital Project Number	Project Budget	Other Committed Funds*	Capital Project Balance	Purchase Amount (excluding HST)	HST Payable	Total Purchase	Project Balance
921221101	\$187,000	\$0	\$187,000	\$175,000	\$3,080	\$178,080	\$8,920

Any surplus or deficit will be dealt with by the Treasury Department according to the Capital Close policy.

Consultations:

Supervisor, Procurement
Treasurer

Department Head email: jstover@kawarthalakes.ca

Department Head: Jennifer Stover

Department File: 2022-71-SS