TO:	**CHAIR AND MEMBERS** **CORPORATE SERVICES COMMITTEE** **MEETING ON JULY 13, 2020**
FROM:	**MAT DALEY – DIRECTOR, INFORMATION TECHNOLOGY SERVICES**
SUBJECT:	**RFP 20-22 SHAREPOINT ONLINE MIGRATION**

RECOMMENDATION

That, on the recommendation of the Director, Information Technology Services, City Manager's Office, and with the concurrence of the City Clerk, Legal and Corporate Services, the following actions **BE TAKEN** with respect to the SharePoint Online Migration:

a. The proposal submitted by Elantis Solutions, 10123 – 99 Street, Suite 400, Edmonton, Alberta, J5J 3H1, for the SharePoint Online Migration **BE ACCEPTED** in accordance with the Procurement of Goods and Services Policy;

b. The financing for this project **BE APPROVED** as set out in the Sources of Financing Report <u>attached</u>, hereto, as Appendix A;

c. Civic Administration **BE AUTHORIZED** to undertake all administrative acts that are necessary in connection with this purchase, and;

d. The approval hereby given **BE CONDITIONAL** upon the Corporation entering into a formal contract, agreement or having a purchase order relating to the subject matter of this approval.

PREVIOUS REPORTS PERTINENT TO THIS MATTER

None.

2019-2023 STRATEGIC PLAN

This project supports the Corporation in its Strategic Area of Focus of **Leading in Public Service**.

Creating and migrating to a SharePoint Online platform also supports multiple strategies outlined in the Strategic Plan 2019-2023, including:

- Continue to maintain, build and enhance a high-performing and secure computing environment; and
- Deliver and maintain innovative digital solutions to increase efficiency and effectiveness across the Corporation.

The Corporation's SharePoint application, CityHub, is an important tool that will continue to support the Corporation in achieving these results.

BACKGROUND

Purpose

The purpose of this report is to seek approval from Committee and Council to award the SharePoint Online Migration to Elantis Solutions, at the proposed cost of $568,000.00 (exclusive H.S.T). CityHub is the Corporation's Electronic Document and Records Management System (EDRMS). As a knowledge management tool, it provides an essential service to the Corporation as the repository of corporate information. CityHub is divided into a Document Centre, where active files are maintained, and a Records Centre, where inactive files are stored. The Corporation has approximately 2.6 million active files stored in the Document Centre and 1.2 million inactive files stored in the Records Centre. This amounts to approximately 3.4 terabytes of data across four (4) servers. The project plan will include migration of all CityHub files to SharePoint Online. The current SharePoint environment is in extended support which will end in 2023.

This contract includes one-time project implementation costs for:

- System design;
- Migration planning and delivery;
- Communications and change management;
- Project management;
- System documentation;
- Security testing;
- Post go-live support;
- SharePoint 2013 decommissioning; and
- Technical training.

Background

CityHub, the City of London's current EDRMS, is built in a SharePoint 2013 on-premises environment, and leverages Gimmal Records Management (GRM), Nintex forms and workflow, PSIcapture scanning, and Colligo email integration. The Corporation uses The Ontario Municipal Records Management System (TOMRMS) as its classification scheme and retention schedule which is integrated into CityHub. Within the current SharePoint environment, with our business partners, Information Technology Service (ITS) is undertaking a digital transformation to leverage Nintex forms and workflow by replacing the Corporation's forms with Nintex forms, and automating the associated processes. Examples of these processes include approvals, notifications, and courtesy copies. There are currently 45 Nintex forms and 34 associated workflows in CityHub. This transformation reflects our commitment to put the people, knowledge and tools in place to support innovative best practices throughout our Corporation. One focus of this transformation is to reduce inefficiencies in accordance with the Corporation's Continuous Improvement Strategy, allowing staff to focus on optimized service delivery.

SharePoint 2013 support will expire in 2023. As such, there are risks associated with delaying migration. The primary risk is the loss of corporate data. Remaining on an unsupported platform increases the risk that the Corporation could lose access to its knowledge management system and the corporate body of information it contains. As well, we face an increasing risk of security threats, difficulty in responding to service disruptions, reduced ability to respond quickly and to introduce minor enhancements as needs evolve, and an impact on our ability to effectively manage the volume of information that is currently hosted on our site.

The use of SharePoint reflects the Corporation's strategic commitment to intelligently leveraging Cloud computing. The migration to SharePoint Online is part of a larger organizational transition to Office 365. As such, the new SharePoint Online platform will provide a more integrated experience for users of CityHub. Other municipalities that have adopted the SharePoint Online platform include the Region of Durham, the Region of Peel, the City of Ottawa, and the City of Brampton.

To date, based on best practices and to set the project up for success, several pre-project initiatives were undertaken by ITS and the City Clerk's Office to prepare for a migration to SharePoint Online, both from a technical perspective, and a governance perspective:

- The CityHub Governance Committee was formed:
    - This committee is made up of representatives from each Service Area, whose role is to act as spokesperson for, and communicate with, their Service Areas regarding CityHub initiatives;
- A SharePoint Governance Plan was developed:
    - Representatives from across the Corporation were engaged, and roles were assigned for both technical and corporate resources regarding governance of the platform;
- SharePoint and Records Management education for the Corporation were provided:
    - The CityHub Power Users Group was formed to create a group of users with advanced SharePoint skills;
    - A curriculum of technical SharePoint skills and records management training were developed and offered through the Corporation's corporate training program;
- SharePoint road-mapping activities were conducted:
    - A preliminary plan was developed to move to SharePoint Online, along with identification of next steps and potential challenges;
    - The CityHub technical team has taken steps to remediate as many of the potential challenges in advance as possible;
- Inactive records were disposed of:
    - Any inactive records that had reached the end of their retention period by December 31, 2019 were disposed of, reducing the total number of records needing to be migrated and ensuring compliance with the Corporation's Records Retention By-law;
- The Corporation's email system was migrated to Office 365:

o Office 365 is the basis for all online Microsoft platforms, including Exchange Online and SharePoint Online. Having this infrastructure in place reduces the complexity to migrate to SharePoint Online.

This project will be completed in partnership with the selected vendor, ITS, and the City Clerk's Office, along with the involvement of other Service Area staff.

DISCUSSION

In response to the RFP, Elantis Solutions met the requirements of the evaluation committee and presented a proposal that will support the Corporation in moving forward with the migration to SharePoint Online. With offices located in Edmonton and Vancouver, Elantis Solutions has assisted seven (7) public sector entities with SharePoint migrations. They also have extensive experience assisting the private sector with SharePoint migrations. During six (6) years in business, they have focused on SharePoint strategies, migrations, and enterprise content management, along with process automation and innovation with Nintex workflow.

Key elements of their proposal include the following:

- Proven experience in working with municipalities;
- Proven experience in delivering SharePoint migrations;
- Robust infrastructure and application support post-implementation; and
- A sound project management methodology.

Elantis Solutions was selected not only for their aforementioned public sector SharePoint experience, but also because of their experience with Nintex forms and workflow. Their staffing complement includes one (1) of only three (3) Nintex Virtual Technical Evangelists in Canada. They have significant experience migrating Nintex to Office 365, and have been nominated for the Nintex Solution Innovation Awards.

In their proposal, Elantis Solutions demonstrated a thorough understanding of the challenges associated with migration from SharePoint on-premises to SharePoint Online, and provided strategies to overcome these challenges, confirming their suitability for this engagement. They also emphasized proper change management strategies, focusing on consistent user experience to ensure a high level of end-user adoption and acceptance. A key element of their proposal included demonstrating value to the Corporation through the development of Key Performance Indicators such as user satisfaction and performance levels.

Procurement Process

On March 9, 2020, on behalf of ITS and the City Clerk's Office, the Purchasing & Supply Management department issued a formal Request for Proposal (RFP20-22) for the SharePoint Online Migration on the Corporation's Bids and Tenders website to source a qualified and experienced proponent to complete this work. Project management, solution design, remediation of third-party and custom components, training and documentation, user acceptance testing, deployment and data migration, change management, and post go-live service and support were all attributes of this endeavor.

After the RFP was posted, there were ten (10) Addenda issued to respond to questions, inquiries, and requests for clarification. When the RFP closed, five (5) compliant submissions were received, and one (1) submission was disqualified due to not meeting ITS technical mandatory requirements.

A two (2) envelope RFP process was used – one envelope contained the technical project proposal and the second contained the pricing proposal.

Four (4) evaluation committee representatives from the City Clerk's Office, Development and Compliance Services, and ITS evaluated the four (4) submissions based on the technical criteria outlined in the document. At the end of this process, the proponent with the highest score, demonstrating their ability to fully meet the Corporation's requirements, was Elantis Solutions. The pricing for their proposal amounts to $568,000.00 (exclusive H.S.T.).

FINANCIAL IMPACT

The capital expenditure to fund the SharePoint Migration project was approved in the 2020-2023 Multi-Year Budget and the Source of Financing is attached as Appendix A.

ACKNOWLEDGEMENTS

This report was prepared with the assistance of Purchasing Services, Legal Services, the City Clerk's Office, and Information Technology Services.

PREPARED BY:	PREPARED BY:
Julie Wilson **Manager, Enterprise Applications I, Information Technology Services – City Manager's Office**	**Bridgette Somers** **Manager, Corporate Records, City Clerk's Office – Legal and Corporate Services**
RECOMMENDED BY:	**CONCURRED BY:**
Mat Daley **Director, Information Technology Services – City Manager's Office**	**Cathy Saunders** **City Clerk, City Clerk's Office – Legal and Corporate Services**

CC:

Mary Ma, Procurement Officer, Purchasing and Supply
Lisa Mugford, Coordinator, Development and Compliance Services

#20104

Chair and Members
Corporate Services Committee

July 13, 2020
(Contract Award)

RE: RFP20-22 SharePoint Online Migration
     (Subledger CP200004)
     Capital Project GGAPPL1803 - City Hub Upgrades & Enhancements
     Elantis Solutions - $568,000.00 (excluding H.S.T.)

FINANCE & CORPORATE SERVICES REPORT ON THE SOURCES OF FINANCING:

Finance & Corporate Services confirms that the cost of this project can be accommodated within the financing available for it in the Capital Works Budget and that, subject to the adoption of the recommendations of the Director, Information and Technology Services, City Manager's Office, and with the concurrence of the City Clerks, Legal Corporate Services, the detailed source of financing for this project is:

ESTIMATED EXPENDITURES:	Approved Budget	Commited to Date	This Submission	Revised Budget
IT3010 - Application, Data, Information & Process				
Consulting	$1,106,431	$856,726		$249,705
Consulting - **City Hub Upgrades & Enhancements**	96,554	96,554		0
Computer Equipment	445,072	416,071		29,001
Computer Equipment - **City Hub Upgrades**	597,625	19,628	$577,997	0
City Related Expenses	926			926
Communication Costs	1,996,503			1,996,503
NET ESTIMATED EXPENDITURES	**$4,243,111**	**$1,388,980**	**$577,997** 1)	**$2,276,134**
SOURCES OF FINANCING:				
IT3010 - Application, Data, Information & Process				
Capital Levy	$2,206,071	$1,272,798		$933,273
Drawdown from Technology Reserve Fund	1,342,861			1,342,861
Drawdown from Technology Reserve Fund - **City Hub Upgrades**	694,179	116,182	$577,997	0
TOTAL FINANCING	**$4,243,111**	**$1,388,980**	**$577,997**	**$2,276,134**

1) Financial Note:

	GGAPPL1803
Purchase Cost	$568,000
Add: HST @13%	73,840
Less: HST Rebate	(63,843)
Total Purchase Cost	$577,997

kw

Kyle Murray
Director of Financial Planning & Business Support