Staff Report to Council

Corporate Services – IT Division

FILE: 01-0450-01/26

REPORT DATE:	November 01, 2026	**MEETING DATE:**	November 23, 2026
TO:	Mayor and Council		
FROM:	Darrin Fast, Manager of Information Technology Services		
SUBJECT:	**2027 Draft Business Plan - Information Technology Services Division**		

CHIEF ADMINISTRATIVE OFFICER REVIEW/APPROVAL: M. Roberts / November 9, 2026

RECOMMENDATION(S):

THAT Council:

A. Receive for information the Information Technology Services Division 2027 Draft Business Plan and Staff Report as presented at the November 23, 2026 Council Meeting; OR

B. Other.

PURPOSE

To present the 2027 Draft Business Plan for Information Technology Services Division

☒ Information Report ☐ Decision Report ☐ Direction Report

DISCUSSION

DIVISION OVERVIEW

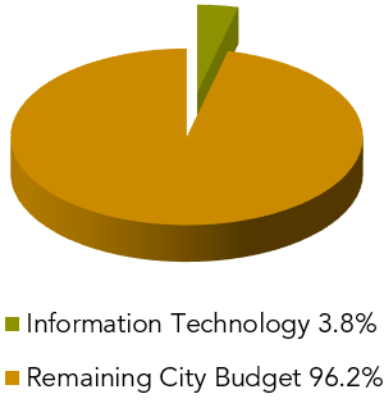
Information Technology is responsible for planning, developing, and managing the City's information systems and technology services. The department comprises six full-time employees who support and maintain the City's computer networks, data storage, server infrastructure, printing, telephony, mobile devices, and end-user equipment.

IT also manages the City's portfolio of business applications; plans and implements cybersecurity measures; and partners with City departments to identify, assess and implement, technology solutions that support efficient operations and effective service delivery. The division provides technical expertise and support for corporate technology initiatives, including ERP modernization, information and records management, responsible AI adoption, and infrastructure renewal. These initiatives are undertaken in collaboration with business areas to ensure technology investments align with organizational priorities, business requirements, privacy and security obligations, and long-term financial sustainability.

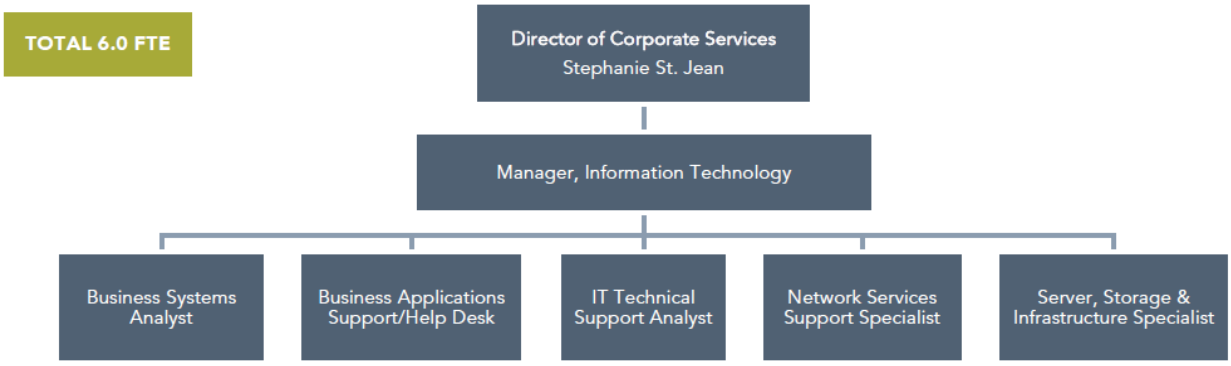
Operating Budget: $1,475,400

Capital Budget: $727,000

% Share of overall City Budget: 3.8%



Staff Complement:



Forecasted Position Adjustments

Upon Council approval of the 2027 Decision Package for the Enterprise Resource Planning (ERP) System Replacement, one temporary full-time position to backfill the Manager, Information Technology and a temporary full-time Business Analyst is needed for the implementation period, planned to be two years (2028/2029). The funding for these positions is included in the capital project from applicable reserves and will not increase property taxation.

Key Performance Measures

The following table highlights key divisional statistics:

Performance Measure [Strategic Priority]	**2025 Actual**	**2026 Forecast**	**2027 Forecast**
# Resolved Support Tickets [Corporate Excellence]	*2500*	*3000*	*3200*
# Cyber Threats Intercepted (weekly) [Corporate Excellence]	*5.5M*	*6M*	*6M+*
Security Patch Compliance (%) [Corporate Excellence]	*99.9%*	*99.9%*	*99.9%*
Critical System Uptime (%) [Corporate Excellence]	*99.9%*	*99.9%*	*99.9%*
% MFA User Coverage (Users covered by multi factor) [Corporate Excellence]	*95%*	*97%*	*97%*
Phishing Resilience [Corporate Excellence]	*75%*	*95%*	*97%*
% Endpoint Security Coverage [Corporate Excellence]	*99.9%*	*99.9%*	*99.9%*
Cyber Security Culture Rating [Corporate Excellence]	*Good*	*Strong*	*Excellent*
# Software Applications Supported [Corporate Excellence]	*50*	*56*	*56*
# Security Awareness Sessions Provided [Corporate Excellence]	*20*	*26*	*20*
# End User Devices Supported [Corporate Excellence]	*325*	*385*	*395*
# Council Meetings Live Streamed [Corporate Excellence]	*26*	*28*	*28*

Deferred Projects

As a result of priorities that emerged throughout the year, the following 2026 business plan initiatives were deferred:

- **CYBER SECURITY MATURITY ASSESSMENT.** The 2026 Cyber Security Assessment was deferred following delays in the firewall replacement project, as the assessment was intended to evaluate the City's cybersecurity environment following implementation of the new firewall infrastructure. For 2027, the division will prioritize a cybersecurity incident response tabletop exercise to support the City's cyber incident preparedness and meet applicable cybersecurity insurance requirements. The maturity assessment has not been carried forward as a 2027 initiative and may be reconsidered as part of future cybersecurity planning and investment prioritization.

2026 Achievements (Top 3)

- **NEW RCMP DETACHMENT IT IMPLEMENTATION.** A key 2026 accomplishment was the successful planning, design, implementation, and stabilization of the IT environment for the new RCMP Detachment. IT delivered the required municipal network connectivity, supported telecommunications, end-user devices, printing, mobile connectivity, and other technology services needed to enable the facility's opening and ongoing operations. *[Public Safety – Police]*

- **ERP MODERNIZATION PROJECT – PHASE 1 COMPLETION.** Completed Phase 1 of the ERP Modernization Project, including an assessment of the City's existing systems and business processes against modern ERP capabilities and leading practices. The work also established a future-state vision, evaluated viable ERP solution options for Pitt Meadows—including costs, benefits, and limitations—and defined a City-wide vision for digital service delivery. This foundational work will guide future project phases and support decisions on the City's long-term ERP strategy. *[Corporate Pride - Resources]*

- **PRINT FLEET REPLACEMENT** Modernized the City's print fleet which included replacing end-of-life devices, reducing the overall number of printers and multifunction devices to better align with actual print demand, and introducing new print-management technologies designed to help reduce print waste and lower the total cost of ownership for the City's print environment. *[Corporate Pride - Resources]*

Key Challenges for 2027

- **BUDGET PRESSURE AND DEMONSTRATING VALUE.** IT will face continued pressure from rising software licensing, cybersecurity, cloud services, infrastructure renewal, and vendor costs. The challenge will be to prioritize resources while maintaining reliable and secure technology services, addressing lifecycle requirements, and demonstrating the operational, financial and risk-reduction benefits of technology investments.

- **AI GOVERNANCE AND RESPONSIBLE ADOPTION.** Enabling broader use of AI while ensuring it is implemented safely, responsibly, and in alignment with City policies, privacy obligations, and other requirements. The City will need clear governance, approved tools and use cases, staff training, appropriate human oversight, and defined accountabilities to support responsible adoption in accordance with applicable legislation and corporate policies.

- **CYBERSECURITY AND RANSOMWARE RESILIENCE.** Municipal services, personal information, and operational systems remain attractive targets for cyber criminals. Ransomware continues to be Canada's most impactful cybercrime threat, with potentially significant service-delivery, recovery, and reputational consequences. Maintaining effective security controls and strengthening organizational readiness will require ongoing risk assessment, infrastructure renewal, incident response preparedness, and appropriate backup, recovery and business continuity arrangements.

Key Initiatives 2027

Strategic Priority	Initiative
Corporate Excellence – Resources	**FIREWALL REPLACEMENT PHASE 2.** Undertake PHASE 2 of the corporate firewall replacement project which includes the full replacement of two aging corporate firewall devices and review and optimization of network security policies. The project will strengthen network security, support reliable service delivery and reduce risks associated with aging infrastructure.
Corporate Excellence – Resources	**SERVER REPLACEMENTS.** IT will replace two physical domain controller servers, as well as the City's high-capacity video server and all associated storage devices. This replacement will improve system reliability, support capacity and performance requirements, and reduce the risk associated with aging infrastructure.

Strategic Priority	Initiative
Corporate Excellence – Resources	**ERDMS – SHAREPOINT (365) EVALUATION.** This project will assess the viability of using the City's Microsoft 365 SharePoint environment as its enterprise records and document management system (ERDMS). The evaluation will consider records classification, retention and disposition, search and retrieval, access controls, auditability, privacy, security, integration, implementation costs and ongoing administration. Findings will inform a recommendation on the suitability, requirements and next steps for an enterprise records and document management solution, in collaboration with relevant business areas.
Corporate Excellence – Resources	**TELEPHONY MODERNIZATION OPTIONS ASSESSMENT.** The main goal of this project is to assess the City's current telephony environment and identify options for modernizing business calling services. The assessment will consider business requirements, service reliability, functionality, security, integration, accessibility, implementation requirements and total cost of ownership. The outcome will be a recommended approach and roadmap to inform future investment decisions.
Corporate Excellence – Resources	**AI ADOPTION.** Develop and implement a coordinated approach to responsible AI adoption across the City. Work will include establishing appropriate governance, identifying approved tools and use cases, defining privacy and information security requirements, providing staff training, and establishing expectations for human oversight and accountability. Departments will be engaged to identify and prioritize opportunities where AI may improve productivity, service delivery or work quality. Adoption will be supported by appropriate safeguards and evaluation of benefits and risks.
Corporate Excellence – Resources	**ERP MODERNIZATION – VENDOR SELECTION PHASE.** The City will advance its ERP modernization initiative through a structured vendor selection process. This phase will confirm business and technical requirements, evaluate qualified vendors and solution options, assess implementation approach and total cost of ownership, and select a preferred partner to support a modern, secure, and scalable ERP platform for the City. The process will involve relevant business stakeholders and result in a documented evaluation and recommendation to inform the City's next-stage investment decision.

Strategic Priority	Initiative
Corporate Excellence – Resources	**CYBER SECURITY INCIDENT RESPONSE TABLETOP.** IT will facilitate an immersive tabletop exercise designed to test the incident escalation, decision making, communications, privacy breach response, business continuity and recovery considerations in a simulated cyber-attack scenario. Findings will be documented and used to identify corrective actions, clarify roles and responsibilities, and strengthen organizational readiness.
Corporate Excellence – Resources	**ENTERPRISE APPLICATION ENHANCEMENTS.** Upgrades to Tempest, Vadim and other core business, operations and IT systems

PROPOSED OPERATING BUDGET

IT will continue to monitor technology expenditures, including software licensing, vendor contracts, cloud services and infrastructure lifecycle requirements. Budget management will include reviewing licence utilization, identifying opportunities to consolidate or optimize technology services, and assessing the ongoing operating costs and resource implications of proposed technology investments. Material financial implications arising from new initiatives will be identified through the applicable budget and decision-making processes.

	2026 Adopted Budget	2027 Proposed Budget	Proposed Changes for 2027		2028 Proposed Budget	2029 Proposed Budget	2030 Proposed Budget	2031 Proposed Budget
Expenses								
Information Technology	$ 1,392,400	$ 1,475,400	$ 83,000	6.0%	$ 1,540,700	$ 1,608,400	$ 1,679,100	$ 1,752,800
	1,392,400	1,475,400	83,000	6.0%	1,540,700	1,608,400	1,679,100	1,752,800
Net Operating Expenses	**$ 1,392,400**	**$ 1,475,400**	**$ 83,000**	**6.0%**	**$ 1,540,700**	**$ 1,608,400**	**$ 1,679,100**	**$ 1,752,800**
Key Budget Changes for 2027:								
Salary and Benefits			38,800					
Software Licensing			44,000					
Other			200					
Change in Net Operating Expenses			**$ 83,000**					

PROPOSED CAPITAL BUDGET

Division	Project	2027	2028	2029	2030	2031	Total
DV133 - IT							
	080020 - MISC COMPUTER INFR PURCHASE	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 200,000
	080024 - SERVER AND STORAGE REPLACEMENT	$ 31,000	$ -	$ 121,000	$ 180,000	$ -	$ 332,000
	110021 - IPHONE BREAK FIX REPLACE	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 12,500
	150002 - FIRE VEHICLE LAPTOP REPLACEMENT	$ -	$ 45,000	$ -	$ -	$ -	$ 45,000
	150008 - FIREWALL REPLACEMENT	$ 15,000	$ -	$ -	$ -	$ -	$ 15,000
	150014 - TABLET BREAK FIX REPLACE	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 12,500
	170051 - ERP REPLACEMENT IMPLEMENTATION	$ -	$ 950,000	$ 1,550,000	$ 1,550,000	$ -	$ 4,050,000
	190017 - LAPTOP REPLACEMENT	$ -	$ -	$ 140,000	$ -	$ -	$ 140,000
	190019 - APPLICATION ENHANCEMENT FUND	$ 95,000	$ -	$ -	$ -	$ 50,000	$ 145,000
	190023 - SERVER ROOM AC UNIT REPLACEMENT	$ -	$ 20,000	$ -	$ -	$ 10,000	$ 30,000
	200003 - MONITOR REPLACEMENT	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 30,000
	200004 - MOBILITY CONTRACT REFRESH	$ -	$ 15,000	$ -	$ -	$ -	$ 15,000
	250036 - CYBERSECURITY RESILIENCE AND RISK REDUCTION PROGRAM	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 75,000
	260020 - ERP REPLACEMENT ASSESS & PROCUREMENT	$ 400,000	$ -	$ -	$ -	$ -	$ 400,000
	270003 - ERDMS SHAREPOINT (365) EVALUATION	$ 65,000	$ -	$ -	$ -	$ -	$ 65,000
	270004 - TELEPHONY MODERNIZATION OPTIONS ASSESSMENT	$ 55,000	$ -	$ -	$ -	$ -	$ 55,000
	990039 - DESKTOP COMPUTER REPLACEMENT	$ -	$ -	$ -	$ 200,000	$ -	$ 200,000
	990040 - CORE AND LEAF SWITCH REPLACEMENT	$ -	$ -	$ -	$ 145,000	$ -	$ 145,000
	990046 - PRINTER REPLACEMENT	$ -	$ -	$ -	$ -	$ 135,000	$ 135,000
DV133 - IT Total		$727,000	$1,096,000	$1,877,000	$2,141,000	$261,000	$6,102,000

DECISION PACKAGE(S)

See Attachments A and B.

PUBLIC PARTICIPATION

☒ Inform ☐ Consult ☐ Involve ☐ Collaborate ☐ Empower

KATZIE FIRST NATION CONSIDERATIONS

Referral ☐ Yes ☒ No

SIGN-OFFS

Written by:	**Reviewed by:**
Darrin Fast IT Manager	Stephanie St. Jean, Director, Corporate Services

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ATTACHMENT(S):

A. Decision Package: ERP Modernization Phase 2 (Procurement)
B. Decision Package: ERDMS SharePoint (365) Pilot Evaluation

ATTACHMENT A:

DECISION PACKAGE: ERP Modernization Phase 2 (Procurement)

Department/Division	Corporate Services IT and Financial Services	
Submitted by	Darrin Fast, IT Manager	
Estimated Capital Cost	One time: $400,000	Ongoing: $
Estimated Operating Cost	One time: $	Ongoing: $

Recommendation

THAT Council:

A. Approve an expenditure of $400,000, funded from the Equipment Replacement Reserve, for Phase 2 of the ERP Modernization Project and, if a suitable proposal is identified, proceed with vendor selection, negotiations, and contract award in accordance with the City's procurement policy; OR
B. Other.

Executive Summary

The City is undertaking a multi-year ERP Modernization Project. Phase 1 began in early 2026 and will conclude by year-end. This phase will provide a current-state assessment of the City's ERP environment, including an evaluation of existing systems and business processes against modern ERP capabilities and leading practices. It will also define the future-state vision, assess viable ERP solutions for Pitt Meadows—including their costs, benefits, and limitations—and establish a vision for digital service delivery across the City.

The proposed second phase, planned for 2027, will focus on detailed ERP requirements gathering, RFP development, market evaluation, and the selection of preferred partners to support the City's ERP modernization implementation. Following the RFP evaluation, if a suitable solution and vendor is identified, the City will establish a key decision checkpoint before the implementation phase begins. This will allow the City to deliberate through its business planning processes and confirm full organizational, financial, and strategic alignment before proceeding with implementation. Additionally, contract negotiations with the preferred vendor must include clear termination or exit clauses at defined milestones throughout the main implementation phase should project viability be called into question. Also, contract negotiations will include language permitting a 6-month pause, delaying the implementation date to January 1, 2028, allowing the City to undertake a recruitment process for the Backfill and a new temporary position. The goal is to control costs to the greatest extent possible and reduce the risk of an unsuccessful implementation proceeding at the full cost of the project.

The final phases of the project will focus on implementation, including data readiness, system configuration and deployment, change management, and post-implementation stabilization of the new ERP system or systems.

Background/Discussion

The City has relied on its current Finance ERP system to support finance and accounting processes for more than 20 years, and on its Operations System for approximately six years. Recent experience has increased the City's concerns regarding vendor support, product sustainability, and future investment in both systems.

The long-term product direction and commitment to both systems remain unclear. At the same time, the City's satisfaction with product support for these systems has deteriorated in recent years, creating significant operational and business-continuity risk. Similarly, the City has experienced a growing number of errors within its Operations Systems. Its vendor is encouraging a migration to a cloud-hosted solution. However, such a migration could introduce substantial disruption, implementation risk, and integration challenges because of the extensive dependencies and interfaces between the Operations system and current Finance ERP.

The integrations between these systems are becoming less reliable, resulting in recurring disruptions to Finance, Payroll, Operations, and IT. A City risk assessment identified more than 15 medium- to high-rated risks associated with continued reliance on these systems, including limited ability to improve services, support growth, modernize business processes, or realize operational efficiencies.

Stakeholders agree that the City requires modern, flexible, reliable, and well-supported systems to protect its financial and operational integrity. The ERP Modernization Project will use a phased approach to replace the existing Finance ERP and, where justified through the project's evaluation and decision points, the current Operations system. This multi-year initiative will include defined checkpoints to confirm solution viability, business alignment, affordability, and implementation readiness before proceeding to subsequent phases. Given the scale and complexity of these replacements, a phased approach will reduce the likelihood of implementation failure while minimizing unnecessary expenditures and demands on City resources.

The first phase of the ERP Modernization Project is currently being completed in 2026. It will identify current-state risks, system limitations, and opportunities for modernization. This phase will also assess modern ERP solutions suitable for the City of Pitt Meadows and provide preliminary cost estimates, including implementation, software licensing, and internal resourcing and backfill requirements.

Phase 2, which is the subject of this decision package, will undertake a detailed requirements and procurement analysis starting in early 2027 and advance the project through a Request for Proposals (RFP) process. At this point a well-defined check point will be initiated allowing the City

to confirm full organizational, financial, and strategic alignment before proceeding with implementation. This phase will support data readiness, vendor evaluation, selection, go/no-go deliberations and contract negotiations. It is anticipated that staff backfill and the temporary new position will be in place January 1, 2028, allowing the implementation phase to run for two years (2028 & 2029).

The final phases of the project will focus on implementation, organizational change management, and post-go-live stabilization.

The ERP Modernization Project is expected to deliver the following benefits and outcomes:

- **Digitized processes:** Reduced reliance on, and where appropriate elimination of, paper-based processes.
- **More efficient business processes:** Re-engineered workflows that reduce manual effort, duplication, and the time required to complete routine tasks.
- **Improved business-system alignment:** Software that more closely supports the City's operational, financial, and service-delivery requirements.
- **Better staff experience:** Improved usability, intuitive user interfaces, and self-service capabilities for employees and managers.
- **Reduced complexity:** Simplified processes, fewer duplicate data-entry activities, and clearer system responsibilities.
- **Increased automation:** Opportunities to automate routine workflows, approvals, notifications, reconciliations, and data exchanges.
- **Stronger vendor and contract management:** Better alignment between vendor commitments, service levels, support expectations, and the City's operational needs.
- **Greater system reliability and support:** More stable technology platforms, improved vendor responsiveness, and clearer product roadmaps.
- **Enhanced service delivery:** Reliable systems and integrations that support consistent, timely services to internal departments and the public.
- **Improved data, integration, and analytics:** Better access to accurate information, more dependable integration between systems, and enhanced reporting and analytical capabilities.
- **Greater flexibility and scalability:** An ability to adapt more quickly to changing business needs, regulatory requirements, and future growth.

- **Expanded integration and innovation opportunities:** Improved capacity to integrate with service-based and resident-facing systems, including systems that accept public payments.
- **Reduced cyber risk:** Modernized security capabilities, improved vendor support, and reduced reliance on aging technology and unsupported integrations.

Financial Implications

	One Time		Ongoing	
Costs (2027)	**Capital**	**Operational**	**Capital**	**Operational**
Consultant fees	$250,000	$	$	$
Contingency @15%	$57,000			
Total Costs:	**$307,000**	**$**	**$**	**$**

The total 2027 budget requirement is **$307,000**. The difference between the approved budget of $400,000 will be carried-forward towards the implementation.

Current budget estimates for subsequent phases, including the core implementation and post-go-live activities, are as follows:

- 2028: $950,000
- 2029: $1,550,000
- 2030: $1,500,000

These estimates comprise staff backfill requirements (shown in table below), temporary additional staff resources to support the implementation work, consulting fees, and one-time hardware and software purchases required to support the implementation.

It is important to understand that these estimates are preliminary and will be refined substantially once the final deliverables from Phase 1 are received and potentially refined further when the results of the RFP process (Phase 2) are completed. Accordingly, the remaining projected costs above may be adjusted—potentially significantly—based on the outcomes of Phase 1 and Phase 2.

Operating Impacts

It is anticipated that ongoing operating costs will change following completion of the ERP modernization project and implementation of the final product(s), primarily due to changes in

recurring software support and maintenance costs. Current estimates from the City's recent market scan of viable ERP options indicate that annual support and maintenance costs could range from a minimal increase over current fees to in excess of 2 times what we currently pay for annual ERP software support and maintenance. At this stage, it is too early to determine where the City will fall within that range. Cost certainty will improve as the City narrows its shortlist and evaluates a preferred vendor and software solution. Any changes would take effect no sooner than 2030.

Estimated Resourcing Requirements 2028 & 2029 (inc Backfills and New Temporary Position):

Resource	Vendor Selection (2027)	Implementation (2028 and 2029)
Business Analyst (New Temporary Position)		1 FTE
IT Backfill (Darrin Fast)		1 FTE
Finance Backfill (Korey Holtzman)		1 FTE
Payroll Backfill (Dianna Nordquist)		0.5 FTE

Depending on the final implementation outcomes, the staff backfill arrangements and the new temporary position may need to be extended to stabilize the system and related processes, provided that the extensions can be accommodated within the approved project budget. In addition, the temporary Business Analyst position may need to be converted to a permanent position. At that time, a Business Case will be submitted to the CAO for approval if the permanent position can be accommodated within the City's overall approved budget; otherwise, a Decision Package will be submitted to Council for approval.

Alternatives

1. Do Nothing

- The City would continue operating the current systems without significant change.
- The current risk profile would remain unchanged and is likely to worsen as system reliability, integration stability, and vendor support continue to decline.

- The opportunity cost of maintaining outdated systems would remain or increase, including foregone efficiencies, service improvements, automation, and modernization opportunities.
- This is the lowest-cost option in the short term; however, it does not address the City's underlying operational, financial, or technology risks.

2. Reduce Project Scope

For example, replace either Payroll or the Finance/Accounting system, but not both.

- Replacing only one component would require existing integrations to be redesigned and maintained between the new and legacy systems. This could introduce additional complexity and potentially further affect system stability.
- The City's overall risk profile would improve, but only partially, as significant risks associated with the retained system and its integrations would remain.
- This approach could reduce project costs through a smaller implementation scope; however, it may defer rather than eliminate future costs and risks.

3. Enhance Existing Software in Place

- The extent to which current ERP systems can be meaningfully enhanced is limited and unclear.
- The City has had trouble securing firm vendor commitments for enhancements, with vendor response and resource commitments potentially exceeding 12 months.
- Enhancing the current systems would not address the fundamental concerns related to product direction, aging technology, system reliability, vendor support, and integration instability. As a result, the City's risk profile would remain largely unchanged.

ATTACHMENT B:

DECISION PACKAGE: ERDMS SharePoint (365) Pilot Evaluation

Department/Division	Corporate Services IT	
Submitted by	Darrin Fast, IT Manager	
Estimated Capital Cost	One time: $65,000	Ongoing: $
Estimated Operating Cost	One time: $	Ongoing: $

Recommendation

THAT Council:

A. Approve an expenditure of $65,000, funded from the Equipment Replacement Reserve, to conduct a pilot project to determine the viability of using the City's Microsoft 365 environment as a suitable Enterprise Records and Document Management System (ERDMS); OR
B. Other.

Executive Summary

The purpose of this project is to assess the viability of using the City's Microsoft 365 SharePoint environment as its enterprise records and document management system (ERDMS). If SharePoint is determined to be a suitable solution, the potential benefits are significant. These include making better use of the City's existing Microsoft 365 investment, more closely integrating records and document management with the Office productivity tools staff use every day and reducing reliance on separate systems and workflows. There may also be an opportunity to reduce ongoing licensing costs associated with the current eDocs software; however, the full financial, operational, and technical implications will need to be confirmed through the evaluation.

The evaluation will involve migrating a small, representative subset of City records into the Microsoft 365 SharePoint environment. Staff who perform key ERDMS functions will then use the environment under the guidance of an experienced third-party consultant. This practical assessment will help determine the extent to which SharePoint can meet the City's functional, operational, security, retention, search, usability, integration, and governance requirements.

The evaluation will also identify any implementation costs, ongoing cost implications, and potential savings associated with a transition to SharePoint. Equally important, it will document

the limitations of Microsoft 365 and assess whether any identified gaps would prevent SharePoint from being used as a compliant, reliable, and sustainable ERDMS for the City.

Background/Discussion

The City's current ERDMS (InfoCenter) was adopted in response to the end-of-life status of the previous system (DM). At this time, InfoCenter has not demonstrated the level of stability and reliability required to serve as a sustainable long-term solution. This assessment will provide the City with the information needed to determine whether SharePoint represents a more reliable and strategically aligned option for managing corporate records and information over the long term.

The City continues its strategic shift toward Microsoft 365 as a core platform for productivity, collaboration, information management, and secure remote work. Transitioning the ERDMS to the Microsoft 365 environment would further support this direction by bringing records and document management closer to the tools staff use daily, including Outlook, Teams, Word, Excel, SharePoint and OneDrive.

The proposed approach is to conduct a careful, structured evaluation of SharePoint as a potential ERDMS solution for the City. Rather than committing to a full implementation before confirming that the platform can meet the City's requirements, the City should first undertake a focused, low-cost evaluation to determine functional fit, technical viability, risks, limitations, and anticipated costs.

This approach will provide practical experience using SharePoint in an ERDMS context, validate whether it can support the City's records management and operational needs, and identify any gaps that would need to be addressed. The evaluation will also produce a roadmap and implementation plan that the City can use when it is ready to proceed with a full transition.

In addition to reducing the risk of investing significant time and resources in a solution that may not be viable, this phased approach will help prepare the organization for potential change. It will give key staff early exposure to new processes and tools, build internal knowledge and capability, and introduce the expertise and governance practices that would be required for a successful future implementation.

Financial Implications

	One Time		**Ongoing**	
Costs (2027)	**Capital**	**Operational**	**Capital**	**Operational**

Consultation Services and Potential (Temporary) License Uplift for evaluation team	$65,000			
Total Costs:	**$65,000**			

Alternatives

1. Maintain the status quo

The City could continue using the current InfoCenter environment. While the system remains operational and is sustainable in the short term, it is not an ideal long-term solution. InfoCenter currently corrupts an average of one to two documents per week, in addition to experiencing other intermittent failures. These issues increase IT support workload, frustrate users, and can delay access to important City records and documents. Maintaining the status quo would avoid immediate project costs but would not address the underlying stability, reliability, and user-experience concerns.

There is a possibility that the InfoCenter system will stabilize over time; however, this cannot be predicted with confidence. Conversely, there is also a risk that the system's performance and reliability could continue to degrade, resulting in more frequent failures, increased support requirements, and greater disruption to staff.

2. Develop requirements and issue an RFP for a replacement ERDMS

The City could work with the Records Management team to develop detailed business, functional, technical, security, privacy, retention, and integration requirements, followed by a competitive procurement process for a replacement ERDMS. This would require a significant investment of staff time before a solution could be selected and implemented. The procurement process may ultimately identify SharePoint as the preferred solution in any event. Alternatively, it could result in another separate ERDMS platform that would require additional integration, licensing, administration, and support, and may not align as closely with the City's strategic shift toward Microsoft 365 and SharePoint.

3. Implement SharePoint without prior evaluation

The City could proceed directly to a full SharePoint-based ERDMS implementation. This option is not recommended, as it would commit the City to a significant organizational and technical change without first validating whether SharePoint can meet the City's specific ERDMS, records retention, security, privacy, search, workflow, and governance requirements. Proceeding without appropriate due diligence would increase the risk of unanticipated costs, implementation delays, operational disruption, or discovering critical functional gaps after substantial time and resources have already been invested.