

NO: R097 COUNCIL DATE: June 15, 2009

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**REGULAR COUNCIL**

**TO: Mayor & Council** **DATE: June 9, 2009**

**FROM: Deputy City Manager**  
**General Manager, Finance & Information Technology** **FILE: 1075-01**

**SUBJECT: Purchase and Implementation of Enterprise Content Management (ECM) System**

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**RECOMMENDATION**

It is recommended that Council authorize staff to complete negotiations and enter into an agreement with Open Text Corporation for the supply and implementation of an Enterprise Content Management System at a cost not to exceed \$1,180,000, plus GST and PST.

**BACKGROUND**

The City of Surrey, like most municipalities in BC, has adopted the use of computers on a widespread basis across the workplace. Legislation, such as the *Freedom of Information and Privacy Act*, has added to the complexity of local government records management.

An Electronic Content Management (ECM) system allows for enterprise-wide management of office documents such as letters, reports, agreements, emails, spreadsheets, presentations, drawings, photographs and web pages. Staff produces these kinds of material every day and store them on network file shares and in hard copy form in filing cabinets. Over the past 15 years, an estimated four million files have been created. Vendor pricing for ECM software has dropped significantly compared with prior years. In addition, staff are experiencing inefficiencies with sharing, organizing and finding information they need to perform their work and provide high quality service for the City's customers. An electronic content management system will assist in organizing and making more accessible the City's records and other information and will allow the City to provide high quality service on an ongoing basis.

## DISCUSSION

In March 2009, the City issued RFP #1220-30-05-09 for the supply and implementation of Enterprise Content Management software.

The City received proposals from the following corporations:

1. Open Text Corporation- LiveLink
2. Autonomy - Meridio
3. Hewlett Packard - TRIM
4. MTSAllstream - Oracle
5. OA Solutions (AB) Inc. - Alfresco

An evaluation team comprised of representatives of seven business units and six IT staff undertook an extensive evaluation process. The evaluation was based on a set of pre-determined criteria, as well as live demonstrations with short-listed proponents. The selection criteria included:

- the fit of the proposed technology solution to the City of Surrey requirements,
- the technology's market share,
- the breadth of the proponent's experience in similar initiatives,
- the proponent's record of achievement generally in the market,
- the proponent's corporate viability,
- qualifications of the proponent's personnel that will be assigned to the project,
- references from other organizations, and
- the costs that will be incurred for the product, consulting services, and ongoing maintenance.

### **Results of Evaluation**

Open Text Corporation offered the most competitive pricing and demonstrated that their product would meet or exceed the parameters outlined in the RFP.

The ECM program is being implemented in phases with the first phase being that of building the foundation for the full rollout of the system over time. The first phase includes the following:

Software Costs: \$864,000

Professional Services Costs: \$316,000

- Develop the system wide architecture
- Define, configure and test the city wide core functionality
- Implement the required enterprise wide infrastructure
- Create a citywide user training curriculum
- Create enterprise wide maintenance processes and procedures
- Develop a repeatable process for business unit implementations
- Implement the system in one business unit

The cost of the first phase is \$1,180,000 plus GST and PST.

The City's IT staff will be actively engaged in the first phase of implementation with the expectation that the City's IT Division will build internal expertise so that less assistance from the proponent will be necessary in rolling out the system across all other businesses units after successfully completing the implementation in the first business unit.

### **TIMEFRAME FOR IMPLEMENTATION**

We expect to complete the implementation of the ECM Program by the end of 2010.

### **SUSTAINABILITY CONSIDERATIONS**

The ECM Program provides an excellent opportunity to move the City toward doing business in a more sustainable manner. The City will significantly reduce paper consumption in favour of managing documents electronically. In addition, managing documents/communications electronically better positions the City for electronic distribution of information to external sources, which will result in less carbon emissions from courier and mail distribution methods related to paper forms of communication.

### **CONCLUSION**

Based on the above discussion, it is recommended that Council authorize staff to complete negotiations and enter into an agreement with Open Text Corporation for the supply and implementation of an Enterprise Content Management System at a cost not to exceed \$1,180,000, plus GST and PST.

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