

Municipality of Chatham-Kent

Finance, Budget, Information Technology & Transformation

Information Technology & Transformation

To: Mayor and Members of Council
From: Joann Kjeldsen, Project Manager
Date: June 14, 2021
Subject: Implementation of Microsoft 365

Recommendations

It is recommended that:

1. The Microsoft 365 implementation professional services be directly appointed to CDW Canada Corporation and SoftLanding, under the Kinetic GPO Cooperative Purchasing agreement, up to a total value of \$681,197.
2. The Director, Information Technology & Transformation be authorized to negotiate and execute the final contracts with CDW Canada Corporation, subject to the terms and conditions acceptable to the Purchasing Officer and Director, Legal Services.

Background

In 2020, the Executive Management Team and Council received and endorsed the [Corporate Technology Strategic Plan](#). Part of this plan focused on enhancing information sharing capabilities and electronic records for the organization. The plan identified that the Municipality should evaluate opportunities to exploit more of the Microsoft 365 (M365) functionality with emphasis on collaboration and document sharing. Cross departmental collaboration and opportunities to engage with external sources (other government agencies, customers, clients, and partners) have become crucial for the organization.

The ITT division also completed a M365 strategy and roadmap in 2020, to guide and prioritize the development of organizational services to the new cloud-based platform. The M365 platform offers a suite of new tools and services that provides the ability for our staff and organization to:

- Share, manage and access information from almost any device
- Store and protect files, share them with others
- Empower teamwork by collaborating easily across the organization as well as with customers, clients, and community partners

- Build internal websites (intranets), create pages and offer news ways to communicate and provide organizational news and updates
- Provision information management capabilities to classify documents, identify information sensitivity and ensure legislative compliance for proper retention
- Prevent the loss of important data and documents
- Search for documents, messages, conversations, and people
- Implement organizational governance for the platform that includes security and compliance measures.

In February of 2021 through the annual budget process, Council approved the supplementary budget for the [Corporate Digital Transformation Project](#). The brief outlined the organization's planned migration to Microsoft 365. The focus of the brief centered around the development of a new corporate intranet that would merge with the "Employee Self-Service" site. The Employee Self-Service site provisions access for municipal frontline (deskless workers) to human resources information, forms, COVID information and electronic payroll stubs.

Comments

The M365 implementation aligns with the Electronic Documents Records Management System (EDRMS) Corporate Assessment which is currently underway. Council approved this engagement in October of 2020 via [RFP #R20-165 Municipal Modernization – Electronic Document and Records Management System \(EDRMS\) Assessment](#). The consultant engaged for the EDRMS assessment will be recommending the use of the M365 platform for basic enterprise information management.

The first phase of implementation of Microsoft 365 with CDW and SoftLanding will include the following as deliverables:

- Overall program, project, and organizational change management
- Managed transformation (working with stakeholder groups to provide greater understanding and awareness of platform capability, understanding business objectives, communication and collaboration assessments and business process automation assessment)
- Establishment of M365 Organizational Governance (new policies, procedures, guidelines, and terms of use for M365 cloud-based services)
- Establishment of M365 foundational architecture and framework for the organization and information management considerations
- Review and remediation of M365 tools and features already in production
- Development of a new organizational intranet that will include the current Employee Self-Service site

Once the first phase of work is complete, other M365 initiatives will be prioritized and submitted through future budget processes if required.

Areas of Strategic Focus and Critical Success Factors

The recommendations in this report supports the following areas of strategic focus:

Economic Prosperity:

Chatham-Kent is an innovative and thriving community with a diversified economy

A Healthy and Safe Community:

Chatham-Kent is a healthy and safe community with sustainable population growth

People and Culture:

Chatham-Kent is recognized as a culturally vibrant, dynamic, and creative community

Environmental Sustainability:

Chatham-Kent is a community that is environmentally sustainable and promotes stewardship of our natural resources

The recommendations in this report supports the following critical success factors:

Financial Sustainability:

The Corporation of the Municipality of Chatham-Kent is financially sustainable

Open, Transparent and Effective Governance:

The Corporation of the Municipality of Chatham-Kent is open, transparent, and effectively governed with efficient and bold, visionary leadership

Has the potential to support all areas of strategic focus & critical success factors

Neutral issues (does not support negatively or positively)

Consultation

The Executive Management Team and Council were consulted and have endorsed the implementation of Microsoft 365 tools and services as approved in the 2020 Corporate Technology Strategic Plan and the 2021 supplementary briefing note for the Corporate Digital Transformation Project.

Financial Implications

There are no financial implications resulting from the recommendations. The costs for the engagement(s) was approved in the 2021 budget and are funded from 13903.52131.CORPDIGI.

This engagement includes a 15% contingency fund for implementation which will be closely monitored by the Municipal project control team to ensure the contingency is applied only if required. If required, contingency above the 2021 approved budget of \$650,000 up to \$681,197 will be funded from existing ITT purchase of service base budget 13801.52131.GEN.

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