



STAFF REPORT

TO: Municipal Council

FROM: Erin Hartley, Director of Corporate Services

APPROVED BY: Trudy Payne, CAO

DATE: October 13, 2021

SUBJECT: **Laserfiche Software and AMA Electronic Records Management**

ORIGIN

2021-22 budget approval for implementing an electronic records management system.

RECOMMENDATION

Be it resolved that Council of the Municipality of the District of Shelburne forgo the Request for Proposal process due to sole provider status and authorize the purchase of Laserfiche from ThinkDox at an estimated cost of \$11, 250.00.

-AND-

Be it resolved that the Council of the Municipality of the District of Shelburne adopt the Nova Scotia Association of Municipal Administrators classification scheme and retention schedule in relation to electronic records management.

BACKGROUND

The Municipality of Shelburne approved \$75,000 from capital and \$30,000 from operating in the 2021-22 budget to move from paper to electronic records management. The capital expenses include software, licenses, technological upgrades and infrastructure purchases. The operating piece is earmarked for wages for implementation of the project which is anticipated to begin in January 2022.

DISCUSSION

The first step in the transition from paper to electronic files is to obtain Laserfiche software. Laserfiche specializes in Enterprise Content Management (ECM), which enables organizations to save time and money by efficiently managing documents and information. Through the use of robust back-end technology, it allows structured information to be easily defined and shared across multiple departments or teams. ECM helps organizations digitize documents and automate document-driven processes, allowing the right people to access the right information at the right time.

IT staff with the Municipal Joint Services Board (our IT provider) recommend that the Municipality of Shelburne implement the Laserfiche Document and Records Management system. The system has been successfully implemented at the District of Lunenburg and Town of Bridgewater, and partnering with these Municipalities through the MJSB will reduce the implementation and operating costs to the Municipality through the sharing of computer server infrastructure and software licenses.

While there may be other approaches beyond expanding the scope of our shared service agreement with the MJSB, staff are recommending this approach because:

1. MJSB currently supports the above noted organizations as the first line of support, and has developed their support and escalation processes with that solution;
2. The Eastlink Network Operations Center monitors the data network 24/7, which would include the records management solution;
3. There may be future benefits in having a solution which is interoperable with both the MJSB, Town of Bridgewater and District of Lunenburg, including coordinating provision of future training events; and
4. Costs to implement a solution from scratch would increase substantially for both hardware and software (estimated at minimum \$12,000 in software costs alone).

For these reasons, staff feel it justifiable to forego the Request for Proposal process and purchase records management software since Laserfiche, through the company ThinkDox, could be considered a sole provider. Our IT provider does not currently have the capacity to provide electronic records management support to us using any software other than Laserfiche. The Municipal Solicitor has provided an opinion that this reasoning is sound.

ThinkDox has provided an initial estimate and scope of work including an introductory meeting, configuring repository security, importing the AMA classification scheme and retention schedule, consultations and training for \$11,250.00.

It is also being recommended that staff be trained in the NS Association of Municipal Administrators (AMA) classification scheme and retention schedule. This program is used by the majority of Nova Scotia Municipalities that have an electronic records management system in place. It has also been recommended by ThinkDox and our IT service provider.

ATTACHMENTS

None