



## CORPORATE SERVICES *Staff Report*

---

REPORT NO: COR-2025-33

TO: Council

SUBMITTED BY: Greg Clark, Director of Corporate Services / CFO

PREPARED BY: Kaitlin Bos, Manager of Legislative Services / Municipal Clerk

REVIEWED BY: Harold O’Krafka, Acting Chief Administrative Officer

DATE: June 23, 2025

SUBJECT: Additional Information – Records and Information Management Co-ordinator

---

### RECOMMENDATION:

THAT Report COR-2025-33 Additional Information – Records and Information Management Co-ordinator be received for information; and,

THAT Council approves the in-year operating budget request for the Records and Information Management Coordinator position with an in-year budget impact of \$10,000 for 2025 as described in Report COR-2025-29.

### SUMMARY:

This Report provides additional information to Council on the In-Year Operating Request for a Records and Information Management Co-ordinator within the Legislative Services division of the Corporate Services Department.

### BACKGROUND:

At the Committee of the Whole Meeting on June 2, 2025 Staff presented Report COR-2025-29 titled 2025 In-Year Operating Request - Records and Information Management Co-ordinator. This report requests Council approve to re-evaluate and re-assign a fulltime equivalent within the Legislative Services division. The intent of this proposal is to take the existing vacant Administrative Clerk position (Grade B) remove it from the staffing composition and replace it

with a Records and Information Management Co-ordinator (Grade D). Corporate Services leadership believe the newly proposed position better suits the operational needs of the organization. Report COR-2025-09 is attached to this report as Attachment A.

The Committee of the Whole referred the report back to Staff to report back to the Regular Council Meeting in June with more information.

### REPORT:

Staff have reviewed the two contracts for the Electronic Documents and Records Management software and EDRMS project. Both contracts include a termination clause that would allow the Township to exit the contract without incurring extra costs.

The first contract for the Electronic Documents and Records Management software was entered into in October 2023. The costs incurred to date is \$158,000 including \$50,000 implementation, \$33,600.00 data storage and \$3000.00 monthly for managed services. This project was funded in part by a Municipal Modernization grant. The three-year fixed term contract expires at the end of 2026. The 2026 cost is \$33,600.00 and \$2000.00 per month for managed service. The primary risk of termination of the contract includes the sunk cost in the implementation and work done to date within the software program. If the contract was terminated the corporation would lose access to the program.

The second contract for the EDRMS Solution Design and Development is to define and configure Online sites, information architecture and libraries to support the Township's document and records management requirements for the organization the estimated effort is 550 hours of work to plan, train, implement and roll out two groups. The contract includes 4 phases:

- Phase 1: Planning and Discovery
- Phase 2: Training and Strategy
- Phase 3a: Pilot Group Roll Out (Legislative Services and Corporate Records)
- Phase 3b: Rollout Group 1 (Department to be confirmed)

Staff are nearing the completion of Phase 1: Planning and Discovery which included an estimated 80 hours of effort over a period of 4-6 weeks between the Manager of Legislative Services and Supervisor of Legislative Services. Phase 2: Training and Strategy is scheduled to begin in July and is estimated to require 140 hours of effort over a 4–6-week period, by September we hope to be entering Phase 3a: Pilot Group rollout with Legislative Services and Corporate Records being migrated to the sites, with the information architecture and libraries designed in Phase 1 and 2 being implemented. Phase 3a is estimated to require 170 hours of effort from staff over a period of 12 weeks, during Phase 3a the consultants will be training Legislative Services staff to take a leading role in the onboarding of the Department to be confirmed included in Phase 3b: Rollout Group 1 where the consultants will assist Legislative Services staff to onboard another department.

The estimated cost for this contract is \$108,000.00, to date \$17,000.00 has been spent on the completion of Phase 1: Planning and Discovery. The target end date for the project is March 31,

2026. This timeline includes approximately 15 hours per week of effort for the 36-week rollout plan, this does not include work on physical records, archives, access or privacy work that is also being completed. The effort necessary is difficult for the current complement of Legislative Services Staff to complete with handling day-to-day operation and competing priorities such as the 2026 Municipal Election.

Phase 4 would be outside of the consultant work and will be the Legislative Services leading the other Departments through the corporate wide rollout and implementation. In addition to the project timelines outlined above the remaining business units within the organization will need to be onboarded and data migrated on to the online sites for it to be a corporate wide solution. This corporate wide roll out may take up to 2-3 years, and the system will need ongoing monitoring for permissions, access and security permissions. The dedicated Records and Information Management Co-ordinator would also play a key role in onboarding new municipal employees on the corporate records repository, access, privacy and records management. Staff believe this project is an essential step to improving the Corporation's records and information management program, data security, privacy and governance.

If Council does not wish to proceed with approving a full-time permanent position outside of the budget year, Corporate Services would request a contract position until the end of March 2026 to address the staffing requirements for the EDRMS Solution Design and Development contract. The Mayor and Council could then consider the staffing request as part of the 2026 budget process.

Staff believe a contract position is a short-term solution and would create potential disruptions to the roll-out of the solution to the entire organization as that work continues past the March 31, 2026, date. Staff also wish to note that significant staff time and effort is required in the records and information management space beyond the scope of this software solution contract including but not limited to improving corporate policies and procedures on records and information management, access, privacy and security, staff training in records and information management, compliance with applicable legislation and content clean-up of physical and digital records in accordance with our records retention schedule.

#### ALIGNMENT WITH THE TOWNSHIP OF WILMOT STRATEGIC PLAN:

Trustworthy Leadership

#### FINANCIAL CONSIDERATIONS:

Currently a position exists within Legislative Services at a Grade B, Staff are asking that Council approve the existing position be increased from a Grade B to a Grade D. Approval of the new position would have an impact of approximately \$10,000 during 2025, which can be accommodated within the Corporate Services overall budget based on existing vacancies.

In 2026 the impact would be \$20,150, which would be included in the budget for approval.

If an 8-month contract position was created from August 1<sup>st</sup> to March 31<sup>st</sup> 2026 at the Grade D level the financial impact would be \$13,500. This level of expense could be accommodated within

2025 based on current compensation being lower than budgeted due to new positions not starting on January 1, 2025.

**ATTACHMENTS:**

Attachment A: Report COR-2025-29 - 2025 In-Year Operating Request - Records and Information Management Co-ordinator