



City of Richmond

Report to Committee

To: General Purposes Committee
From: Grant Fengstad
Director, Information Technology
Claudia Jesson
Director, City Clerk's Office
Date: August 18, 2025
File: 03-1000-20-8409P
Re: **Award of Contract 8409P - Document and Records Management System Modernization**

Staff Recommendations

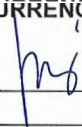


1. That Contract 8409P – Document and Records Management System Modernization Project, be awarded to Cadence Solutions Inc. for an initial five-year term for an estimated value of \$3,350,000 excluding taxes, as described in the report titled “Award of Contract 8409P - Document and Records Management System Modernization Project”, dated August 18, 2025 from the Director, Information Technology;
2. That the Chief Administrative Officer and the General Manager, Finance and Corporate Services be authorized to execute the contract and all related documentation with Cadence Solutions Inc.; and
3. That the Chief Administrative Officer and the General Manager, Finance and Corporate Services be authorized to extend the contract at the end of the initial contract term for an additional five years at an amount of up to \$1,667,500, up to the maximum total term of ten years, for a maximum contract value of \$5,017,500 excluding taxes.

Grant Fengstad
Director, Information Technology
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Claudia Jesson
Director, City Clerk's Office
(604-276-4006)

August 18, 2025

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REPORT CONCURRENCE		
ROUTED TO:	CONCURRENCE	CONCURRENCE OF GENERAL MANAGER
Purchasing	<input checked="" type="checkbox"/>	 Acting GM
Finance	<input checked="" type="checkbox"/>	
SENIOR STAFF REPORT REVIEW	INITIALS:	APPROVED BY CAO
		

Staff Report

Origin

In December 2024, Council approved the Documents and Records Modernization project as part of the 2025 Capital Budget to replace REDMS (Richmond Enterprise Document Management System), which has served the City for over 25 years. The outdated software no longer supports modern workflows or collaboration tools. The new system will improve integration with other City software, boost staff productivity, and offer a longer lifespan due to updated technology. It will also ensure compliance with legislative requirements and records management best practices, maintaining record authenticity, security, and detailed metadata.

This report summarizes the public tendering process for Contract 8409P and provides a recommendation for the provision of a new Document and Records Management System.

This report supports Council's Strategic Plan 2022-2026 Strategy #1 Proactive in stakeholder and civic engagement:

Leverage a variety of approaches to make civic engagement and participation easy and accessible.

This report supports Council's Strategic Plan 2022-2026 Strategy #4 Responsible Financial Management and Governance:

Seek improvements and efficiencies in all aspects of City business.

This report supports Council's Strategic Plan 2022-2026 Strategy #6 A Vibrant, Resilient and Active Community

Enhance and preserve arts and heritage assets in the community.

Analysis

Scope of Work

The City has a requirement for an external service provider to replace the current Electronic Document and Records Management (EDRMS) solution and replace it with a new system optimized to support Microsoft 365 and modern collaboration tools.

The successful proponent will be required to:

- Supply an Electronic Document and Records Management (EDRMS) solution that meets and/or exceeds the requirements described in the RFP
- Integrate the EDRMS solution with City systems and existing workflows

- Collaborate with the City to provide effective project management and change management to ensure successful implementation
- Provide best practice advice and recommendations to meet the City's specific requirements
- Perform migration of all existing OpenText DM content e.g. 8,000,000+ documents etc.,
- Provide staff training and all necessary documentation

Procurement Process

The City posted a Request for Proposal (RFP) 8409P to BC Bid on March 6, 2025 which closed on April 30, 2025.

The RFP requested proponents submit financial proposals for all of the required services for a ten-year (10) term of the contract. Proponents were advised that an evaluation committee would review and score submissions against predetermined criteria to determine the proposal that offered the best overall value to the City.

Thirteen (13) proposals were received by the closing date from the following proponents:

- ADGtech Solutions Inc
- Cadence Solutions
- Concerta Consulting
- FormKiQ Inc.
- Gravity Union Solutions Ltd
- Indixio Inc.
- Kalsoft Inc.
- OpenText Corp
- Record Point
- RKO Business Solutions Inc
- Shinydocs Corp
- Sysintellects LLC
- ThinkDox Inc

Review Process

The RFP submissions were evaluated by a cross-functional team representing Finance, Information Technology, and City Clerk's Office based on pre-determined criteria identified in the RFP:

Proponents were advised that the evaluation process would consist of two phases.

Phase 1 was a scored evaluation of the proposals received based on:

- Financial Proposals (based on a 10 year term)
- Proponent Profile and Qualifications

- Responses to specific questions listed in the RFP

Phase 2 of the evaluation process consisted of:

- Product Demonstration
- Reference Checks
- Financial Assessment

Evaluation Summary

The City received 13 proposals submitted in response to the RFP. Five submissions were excluded from consideration at Phase 1 due to significant deficiencies, including missing technical or project details, pricing that was either excessively high or unrealistically low, unfeasible project timelines, or failure to adequately meet the City's functional and operational requirements as outlined in the RFP.

Table 1 provides a summary of the proposals evaluated by the team in Phase 1.

Table 1 – Phase 1 Evaluation Summary

Proponent	Total Cost based on maximum 10 year contract term	Phase 1 Evaluation Score	Shortlisted
OpenText Corporation	\$2,952,489	67.65%	Shortlisted
Gravity Union Solutions Ltd	\$9,779,860	58.85%	Not shortlisted
Cadence Solutions	\$4,500,000	54.65%	Shortlisted
Concerta Consulting	\$4,796,623	55.45%	Not shortlisted
FormKiQ, Inc.	\$1,213,212	52.80%	Not shortlisted
ThinkDox Inc.	\$5,596,713	47.90%	Not shortlisted
RKO Business Solutions Inc.	\$6,178,740	46.80%	Not shortlisted
Record Point	\$3,203,498	44.80%	Not shortlisted

The proposal from Open Text Corporation achieved the highest overall score after the first evaluation phase and is therefore shortlisted to Phase 2.

Although Gravity Union Solutions Ltd achieved the second highest score after the Phase 1 evaluation stage, the overall cost of their proposal was considered prohibitive and therefore was set aside. Similarly, the proposal received from Concerta Consulting received a relatively high score but was set aside due to the high annual recurring cost. Cadence Solutions achieved the fourth highest score and is shortlisted. Other proponents scored below OpenText and Cadence Solutions and were not shortlisted.

As a result of the evaluation process in Phase 1, two proponents (Open Text and Cadence) were identified as best meeting the overall requirements of the RFP and were shortlisted to advance to Phase 2 of the evaluation process which took the form of a product demonstration and interview questions (based on requirements set out in the RFP) as well as a financial assessment.

Table 2 – Phase 2 Evaluation Summary

Proponent	Total Cost based on maximum 10 year contract term	Phase 2 Evaluation Score
OpenText Corporation	\$2,952,489	32.50%
Cadence Solutions	\$4,500,000	86.50%

Open Text Corporation were awarded a relatively low score after the second phase as they were unable to meet all of the operational requirements during the product demonstration and have therefore not been recommended.

Cadence was able to meet all of the requirements set out in the RFP and submitted a realistic proposal offering the best balance of functionality, implementation approach, team capacity and overall cost. Cadence Solutions had proposed a Software-as-a-Service solution licensed by AvePoint Inc as the City's next Document and Records Management System.

Financial Impact

This project will be funded from the 2025 Council-approved capital project Document and Records Management System Modernization. Table 3 outlines the implementation costs over a five-year implementation and operation period. The on-going subscription licensing will be funded within the existing approved operating budget, with no additional impact. Table 4 summarizes an optional contract extension for another five-year term.

Table 3 - Estimated Total Cost for Implementation and Operation over a five-year term

Description	Costs
Implementation (Professional Services)	\$2,000,000.00
Contingency (15%)	\$300,000.00
Software Subscription Cost – Year 1	\$210,000.00
Software Subscription Cost – Year 2	\$210,000.00
Software Subscription Cost – Year 3	\$210,000.00
Software Subscription Cost – Year 4	\$210,000.00
Software Subscription Cost – Year 5	\$210,000.00
Total Estimated Costs	\$3,350,000.00

Table 4 - Estimated Cost to Operate the System for five years beyond the original contract term

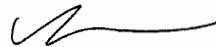
Description	Costs
Software Subscription Cost – Year 6 to 10	\$1,450,000.00
Contingency (15%)	\$217,500.00
Total Operating Costs over five years	\$1,667,500.00

Conclusion

This report presents the results of a competitive tendering process for Contract 8409P – Document and Records Management System Modernization Project. It is recommended that the contract be awarded to Cadence Solutions Inc. for an initial five-year (5) term in the amount of \$3,350,000 excluding taxes, with an option to extend the contract term for an additional five years at an amount of up to \$1,667,500, up to the maximum total term of ten years, for a maximum contract value of \$5,017,500 excluding taxes.



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