



## **REPORT**

**REPORT TO:** Mayor Bonnette and Members of Council

**REPORT FROM:** Ashley Mancuso, Information Governance and Records Management Specialist

**DATE:** February 17, 2021

**REPORT NO.:** ADMIN-2021-0014

**RE:** Award of Contract for Off-Site Records Storage and Related Services

### **RECOMMENDATION:**

THAT Report No. ADMIN-2021-0014 dated February 17, 2021 regarding Award of Contract for Off-Site Records Storage and Related Services be received;

AND FURTHER THAT the contract to supply off-site records storage and related services be awarded to TR Overseas Moving 1927 Inc. (Tippet Richardson Records Management, 1375 Artisans Court, Burlington ON L7L 5Y2) for a five (5) year contract term beginning April 1, 2021 to March 31, 2026, with the option to renew for two (2) 2-year options and one (1) final 1-year period, subject to satisfactory service and pricing negotiations not to exceed the Consumer Price Index (CPI), which will fully end March 31, 2031;

AND FURTHER THAT the Senior Manager of Purchasing and Risk Management be authorized to issue a purchase order to TR Overseas Moving 1927 Inc. (Tippet Richardson Records Management, 1375 Artisans Court, Burlington ON L7L 5Y2) in the estimated annual amount of \$25,000.00 (including HST) for the five (5) year contract and for subsequent option renewal periods, if exercised;

AND FURTHER THAT Council provide pre-budget approval to increase the contractual services operating budget for the clerks division by \$8,500 to offset the increased costs of off-site records storage and shredding services, commencing with the 2022 budget year.

**BACKGROUND:**

Due to retention requirements and storage constraints the Town stores numerous records off-site. The current off-site records storage and related services contract expires March 31, 2021. The Town of Oakville, on behalf of the Halton Co-operative Purchasing Group (HCPG) issued a Request for Proposal (HCPG-4-2020) which closed on January 12, 2021. The HCPG is comprised of four Halton municipalities; Halton Region; two Halton school boards; Halton Regional Police; Milton, Oakville and Burlington Hydro; the Halton Children's Aid Society; Burlington Public Library; Sheridan College and Conservation Halton. The City of Burlington and the Towns of Oakville, Milton and Halton Hills participated in the HCPG-4-2020 proposal process.

**COMMENTS:**

Submissions were received from five (5) firms:

- Access Information Management (Hamilton)
- Iron Mountain (Concord)
- RecordsXpress (Rexdale)
- Salumatics (Brantford)
- TR Overseas Moving 1927 Inc. (Tippet Richardson RM) (Burlington)

The evaluation team, made up of representatives from each of the participating agencies, reviewed and evaluated the bids. All five (5) submissions were evaluated in Stage One (Technical Review). In Stage One, two (2) of the five (5) submissions achieved the required ranking of 70% or higher to move on to Stage Two. Due to the pandemic, submissions in Stage Two (Online Program Demonstration and Facility Tour) were conducted virtually. In Stage Two, both shortlisted submissions achieved the required ranking of 70% or higher to move on to Stage Three. In Stage Three (Fee Proposal) it was determined that TR Overseas Moving 1927 Inc. (Tippet Richardson Records Management) was the overall highest ranked proponent and is recommended for award of the Off-Site Records Storage and Related Services contract.

TR Overseas Moving 1927 Inc. (Tippet Richardson Records Management – formerly Crown RM) is also the incumbent and has delivered exceptional customer service to the Town over the past ten (10) years.

**RELATIONSHIP TO STRATEGIC PLAN:**

This is an operational matter and has no direct relationship to the Strategic Plan.

**FINANCIAL IMPACT:**

The off-site records storage and related services costs included in the Clerks operating budget with an approved amount of \$17,500 for 2021. This account also funds the cost of shredding services to the Town and due to the increased costs of shredding services and a higher estimation of off-site records storage, a pre-budget approval to increase to the contractual services operating budget by \$8,500 is requested.

**CONSULTATION:**

Staff consulted with the Town Treasurer and Director of Finance as well as the Purchasing Analyst from Corporate Services.

The Senior Manager of Purchasing and Risk Management, from Corporate Services, is in agreement with this recommendation.

**PUBLIC ENGAGEMENT:**

Public Engagement is not applicable.

**SUSTAINABILITY IMPLICATIONS:**

The Town is committed to implementing our Community Sustainability Strategy Imagine Halton Hills. Doing so will lead to a higher quality of life.

The recommendation outlined in this report is not applicable to the Strategy's implementation.

**COMMUNICATIONS:**

This report pertains to an operational matter and is not applicable.

**CONCLUSION:**

Staff recommends that TR Overseas Moving 1927 Inc. (Tippet Richardson Records Management, 1375 Artisans Court, Burlington ON L7L 5Y2) be awarded RFP HCPG-4-2020. Staff further recommends the Senior Manager of Purchasing and Risk Management be authorized to issue a purchase order to TR Overseas Moving 1927 Inc. (Tippet Richardson Records Management, 1375 Artisans Court, Burlington ON L7L 5Y2) in the estimated annual amount of \$25,000.00 (including HST) for the five (5) year contract and for subsequent option renewal periods, if exercised.

Reviewed and Approved by,



Valerie Petryniak, Town Clerk and Director of Legislative Services



Chris Mills, Acting Chief Administrative Officer