

The Regional Municipality of York

Committee of the Whole
Finance and Administration
September 19, 2019

Report of the Commissioner of Finance

Establishment of Standard Technology Products

1. Recommendations

1. Council approve the products as described in Private Attachment 1 as standards for a term of five years.
2. Council approve the products as described in Private Attachment 2 as standards for a term of ten years.

2. Summary

This report seeks approval for the Region to establish the brand-name technology products identified in Private Attachments 1 and 2 as standards because of their compatibility with existing equipment and services.

The attachments to this report are private pursuant to Section 239(2)(a) of the *Municipal Act, 2001*, as the subject matter of the attachments involve the security of the property of the Region.

Key Points:

- Procurements of brand-name equipment, devices, licenses, and services are made to support technology products that are currently used in the Region's technology environment
- Recent trade agreements identify specific circumstances under which brand names may be used in technical specifications of procurements
- Sixty-nine technology products meet the requirements for continued use of brand names
- Fifteen of the sixty-nine products require standardisation for five years to support operations until these products are decommissioned
- Fifty-four of the sixty-nine products require standardization for ten years as their use is expected to continue over the long term

3. Background

The Region's technology environment provides staff with reliable and secure systems and tools to support business operations across the organization

The Region's technology environment includes a range of products used to support service delivery and business operations, such as servers, network equipment, storage systems, user devices, applications and security and monitoring.

Technology environments are complex and highly interdependent due to the interoperability required to be able to:

- Share and use information between different hardware and software
- Provide staff with an efficient and seamless experience
- Protect against security threats and breaches
- Reduce redundancy and maximize existing investments
- Reduce operational complexity required to expand, maintain and support the environment.

Introducing or replacing individual technology products within the environment are complex initiatives that require significant time and resources to:

- Plan and mitigate technical impacts to the environment
- Assess and mitigate security risks during and after the transition
- Develop, configure and test integrations between the new and existing components
- Transition from the existing to new component while managing operational and productivity impacts
- Train staff on the hardware and software's use and operation.

Technology products are maintained over the long term to support a consistent environment and protect the Region's investment

The products currently used in the Region's technology environment were originally selected through individual procurement processes that evaluated the product's capabilities against technical requirements, business requirements and value to the Region.

Over time, additional procurements of equipment, devices, licenses, and services related to the original product are required to:

- Support growth in the number of users and service demand
- Provide on-going maintenance and support such as upgrades, security patches, warranties, help desk support and professional technical services
- Enable expansion of and updates to system capabilities to reflect revised business processes and industry standards
- Replace equipment that has reached end-of-life and end-of-support.

These procurements specify that the additional equipment, devices, licenses, and services must be from same brand name as the original procurement. This approach maintains consistency with existing products in the technology environment, prevents service disruption resulting from changing products, and maximizes the return on the investment required to implement and operate them.

Recent trade agreements limit the use of brand names in government procurement

The *Canadian Free Trade Agreement (CFTA)*, the *Comprehensive Economic and Trade Agreement (CETA)*, and the *Ontario-Québec Trade and Cooperation Agreement (OQTCA)* introduced restrictions on the use of trademarks or trade names ('brand names') in the technical specifications of government procurements.

Each trade agreement includes 'limited tendering' provisions that permit additional deliveries of a specific good or service if a change of supplier:

- Cannot be made for economic or technical reasons such as requirements of interchangeability or interoperability with existing equipment, software, services or installations procured under the initial procurement; and
- Would cause significant inconvenience or substantial duplication of costs for the procuring entity.

4. Analysis

Establishing sixty-nine technology products as standards is required to support system reliability and business continuity

Staff seek Council approval of sixty-nine brand name technology products as standards that meet the requirements of the limited tendering provisions in *CFTA*, *CETA* and *OQTCA*, as follows:

- 15 products listed in Private Attachment 1 are nearing the end of their useful life. Establishing these products as standard for five years allows for any necessary procurements to support continued operations while a replacement product is competitively selected and implemented.
- 54 products listed in Private Attachment 2 will continue to be used over the long-term and would benefit from 10-year standardization. These products will be periodically reviewed over this timeframe and may be replaced early if they no longer support business requirements or provide value to the Region.

Each of these products is currently implemented within the Region's technology environment. Additional equipment, devices, licenses, and services must be interchangeable or interoperable with the original product to support a consistent and reliable technology environment. Replacement of these products would require significant time and resources, and duplicate existing investments made into technology products.

Establishing these products as standards will allow the brand name to be specified in the technical specifications of procurements for additional equipment, devices, licenses, and services. Individual procurements will continue to be made in accordance with the Purchasing Bylaw.

5. Financial

The required funding for these products will be managed within the approved annual Finance Department operating and capital budgets.

6. Local Impact

There are no direct local municipal impacts as a result of this report.

7. Conclusion

Staff is seeking Council authorization to establish fifteen brand name technology products as standards for a term of five years, and fifty-four brand name technology products as standards for a term of 10 years. These products contribute towards providing a stable and consistent technology environment for staff and support continuity of services.

For more information on this report, please contact Richard Leest, Acting Director, Information technology Services, at 1-877-464-9675 ext. 71812. Accessible formats or communication supports are available upon request.

Recommended by:

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Approved for Submission:

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Private Attachments (2)
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