



## COUNTY OF SONOMA

575 ADMINISTRATION  
DRIVE, ROOM 102A  
SANTA ROSA, CA 95403

### SUMMARY REPORT

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**Agenda Date:** 5/3/2022

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**To:** Board of Supervisors

**Department or Agency Name(s):** Information Systems Department

**Staff Name and Phone Number:** Jonathan Kajeckas 707-565-2456

**Vote Requirement:** 4/5th

**Supervisorial District(s):** All

**Title:**

Microsoft 365 Training and Organizational Change Management Services

**Recommended Action:**

A) Authorize the Information Systems Department Director or designee to execute a First Amendment to the professional services agreement with Insight Public Sector increasing the contract amount by \$391,620 for a new not-to-exceed contract amount of \$918,129 during an expected 64-week engagement, ending on February 09, 2023 for organizational change management and training services for Microsoft 365 software.

**Executive Summary:**

ISD is currently implementing Microsoft 365 and migrating County data to cloud-hosted services. This project delivers several benefits, including safeguarding County data from a local disaster event and enabling new tools for collaboration.

The existing scope of work with Insight Public Sector addresses the technical implementation, including assessment, design and planning, and execution for security configuration, data migration of email, documents, and existing collaboration sites, and software distribution and management.

The scope of work is being expanded, under the Director's delegated authority, to addresses the communications strategy to, provide best practice recommendations for use of new productivity and collaboration tools, develop training materials for County staff in new software, and support successful adoption through live and recorded training. The department is requesting authority to amend the agreement to increase the contract amount by \$391,620 to cover the cost of the expanded project scope

**Discussion:**

The Information Systems Department is currently engaged in a project to migrate County data including email and document services to Microsoft 365. By subscribing to Microsoft 365 hosting services from secure data centers outside the region, County data will be kept safe from local disasters affecting Sonoma County such as wildfire, earthquake, prolonged power outages, and other hazards.

The Microsoft 365 software tools include functionality for new forms of information sharing and collaboration among County staff, including improvements for the use of mobile devices and collaboration with remote

workers. This item authorizes funds for needs assessment, best practices recommendations, and training to empower County staff to fully leverage these new tools and maximize effectiveness.

The implementation services vendor, Insight Public Sector, was awarded a contract through a competitive process conducted by the State of Utah resulting in a multi-year cooperative agreement and participating addendum by the State of California (Exhibits A and B) which has been reviewed by Purchasing and meets County criteria for competitive award and cooperative agreement; this item seeks Board approval to increase the contract to implement an expanded Statement of Work developed for our specific needs (Exhibit D). Included in the scope of work customer training and organizational change management to complement the implementation project.

**Strategic Plan:**

This request is to support the currently active implementation of Microsoft 365. This directly influences the Resilient Infrastructure Strategic Pillar by way of investing in the training of all staff to utilize new software to increase inter and intra department communications. Implementing Microsoft 365 enterprise wide, will improve the overall operations of the Information Systems Department and its ability to serve Sonoma County employees by way of making these new tools available.

This item directly support the County's Five-year Strategic Plan and is aligned with the following pillar, goal, and objective.

**Pillar:** Resilient Infrastructure

**Goal:** Goal 2: Invest in capital systems to ensure continuity of operations and disaster response.

**Objective:** Objective 1: Strengthen critical communications infrastructure, interoperability, and information technology tools relied upon during disasters.

**Prior Board Actions:**

8/31/21 Board approved a purchase of services from Insight Public Sector for implementation of Microsoft 365 software.

11/17/20 Board approved contract with Evolver, Inc. for County Information Technology risk and cyber-security assessment and business impact analysis.

4/30/19 Board established the IT Resiliency Program, and stated that consulting services would be engaged to develop detailed plans to transition the County from the Microsoft Office tools to a new cloud based productivity and collaboration suite.

6/15/18 - FY 2018/19 Budget Hearing Actions: Board established \$1.7 million in General Fund Reserves for Information Technology Continuity of Operations.

**FISCAL SUMMARY**

<b>Expenditures</b>	<b>FY 21-22 Adopted</b>	<b>FY22-23 Projected</b>	<b>FY 23-24 Projected</b>
Budgeted Expenses	\$38,489	\$318,191	\$34,940
Additional Appropriation Requested			

<b>Total Expenditures</b>	<b>\$38,489</b>	<b>\$318,191</b>	<b>\$34,940</b>
<b>Funding Sources</b>			
General Fund/WA GF			
State/Federal			
Fees/Other	\$38,489	\$169,000	\$34,940
Use of Fund Balance		\$149,191	
Contingencies			
<b>Total Sources</b>	<b>\$38,489</b>	<b>\$318,191</b>	<b>\$34,940</b>

**Narrative Explanation of Fiscal Impacts:**

There are sufficient appropriations in the department's FY2021-22 budget for current Fiscal Year Expense of \$38,489, sourced from charges for services. Of the budgeted expenses for Fiscal Year 2022-23 of \$318,191, \$169,000 will be funded through baseline charges for services, and \$149,191 by ISD Replacement A fund balance from the \$1.7 million information technology resiliency funds set aside by the Board during Fiscal Year 2018/2019 budget hearings to support IT Continuity of Operations. Budgeted expense for FY2023-24 of \$34,940 will be requested as part of future recommended budget.

<b>Staffing Impacts:</b>			
<b>Position Title (Payroll Classification)</b>	<b>Monthly Salary Range (A-I Step)</b>	<b>Additions (Number)</b>	<b>Deletions (Number)</b>

**Narrative Explanation of Staffing Impacts (If Required):**

None

**Attachments:**

Exhibit A: State of California Participating Addendum State of California-Cloud Solutions- AR2485/ 7-17-70-40-01-61001567, dated September 20, 2017

Exhibit B: State of Utah Cooperative Contract #AR2485

Exhibit C: Bid #CH16012 - NASPO ValuePoint Cloud Solutions

Exhibit D: Statement of Work

Single Source Waiver

**Related Items "On File" with the Clerk of the Board:**

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