Oakland County
Department of Information Technology
Project Scope and Approach

Project Name: O365 Program 2023-2024   **Project ID: TT2186OP**

Leadership Group: IT Steering Committee		
Department: Information Technology	**Division:** IT – TSN	
Project Sponsor: EJ Widun	**Date Requested:** 10/1/2022	**PM Customer No.** 186
Request Type: ___*New Development*___ *Enhancement* *Customer Support* *Planned System Maintenance or Upgrade*		
IT Team Name: Enterprise Architecture	**IT Team No:** T	
Project Manager/Leader: Ellen Dixon		
Account Number: 17030 **Account Description:** Technical Systems & Networking		**Customer Name:** IT
Grant Funded? Yes <u>No</u>	**Mandate?** Yes <u>No</u> **Mandate Source:**	

Project Goal

To implement additional integrations and features within the Microsoft 365 (M365) suite for County users so that Oakland County IT can expand the value and recognize investment with M365.

Business Objective

To implement additional features of M365 with appropriate governance so that user adoption and productivity is increased across the County.

Major Deliverables
- Detailed project plan
- File Share Migration to OneDrive / SharePoint Online
- Evaluate and enable new Microsoft (MS) applications
- Additional M365 features and functionality implemented
- Training content
- Updated Governance

Approach
- Drive end user adoption of M365 platform through development of awareness, best practices, and training on the following:
  - MS Bookings
  - MS Forms
  - MS Groups
  - MS Teams
  - OneDrive
  - OneNote
  - Office Suite
  - Power Automate

- ○ SharePoint Online
- ○ Delve
- Migrate file share to M365 applications: OneDrive or SharePoint Online
- Evaluate and if determined implement new M365 applications countywide to improve employee engagement, collaboration, and productivity:
  - ○ Viva Suite of applications
  - ○ PowerBI
  - ○ New MS applications

Research & Analysis

IT Research & Advisory Services Recommendation

Info Tech Research Group: Research Conducted

Key Findings

- Shadow IT is easier than ever. Without suitable onboarding and agreed-upon practices, employees will seek out their own solutions for collaboration. No transparency of what tools are being used means that information shared through shadow IT cannot be coordinated, monitored, or regulated effectively.

- Collaboration tools are designed to help optimize teamwork. Productivity is enhanced when workers collaborate from a single, centralized point. Organizations should therefore streamline their toolsets to make collaborating easier and more efficient.

- An organization will often have overlapping suites and specialized apps. However, if this is the case, there ought to be reasons that explain why having a best-of-breed tool is a useful expense and why its overlap with a suite won't cause user confusion.

- Trying to force employees to use a tool that does not match or enhance their workflow will be met with user resistance. In such a context, this tool's adoption will likely fail, and shadow IT will proliferate.

- Having an approved streamlined toolset that is employee-backed reduces security problems.

- File transfers and communication through unmonitored, unapproved tools increases phishing and hacking risks.

- Uploading sensitive documents to unapproved content repositories increases organization vulnerability.

- The more collaboration tools an organization uses, the more collaboration endpoints require securing.

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Recommendation

- Evaluate the current collaboration toolset to identify genuine overlaps and gaps.

- Strategize toolset overlaps. Use best-practice recommendations to determine which redundant overlapping tools should be phased out.

- Fill toolset gaps. Build business requirements to fill toolset gaps and create an adoption plan for deploying new tools.

- Foster communication capability: facilitate communicate and interaction between participants with multi-functionality to achieve different goals.

- Have an easy-to-understand interface: be easy to and intuitive to navigate, emulating an existing tool or an aspect of the physical world.

- Have the capability and expectations of collaboration: give the user reason to input information and the expectation that their input will elicit a response (Lomas et al, 2008)

- IT needs to ensure all collaboration tools in use are approved and capable of being monitored.

- The Collaboration Strategy is intended to be a living document. Designate a person to keep the document updated at all times.

- Create adoption and communication plans and focus on strengthening employee relations.

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users: 4,850 +/- County employees and external users

Divisions: All

Leadership Groups: All

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Risk

Business Environment: **High** - Project will dramatically change existing business processes or will negatively affect the business environment if implementation is unsuccessful.

Technical Environment: **High** - New or non-standard technology.

Assumptions

Staffing   IT Staffing: resources will be available for the hours indicated per the attached project plan.

Additional Staffing: additional staffing will be available as follows:

Role:	Name	Hours per Day
Project Sponsor	EJ Widun	As needed
M365 Advisory Committee	Tammi Shepherd	As needed
M365 Advisory Committee	Janette McKenna	As needed
M365 Advisory Committee	Jeff Quinn	As needed
M365 Advisory Committee	TJ Fields	As needed
IT Stakeholder	Mike Timm	As needed

Facilities

-

Technical

-

Funding

- Office 365

Other

-

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Priority

-

Constraints

-

Exclusions

- none

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PROJECT PHASE AUTHORIZATION

Phase(s):　　O365 Program 2023-2024		
Total Estimated Application Services　　　　　**Hours:　　971**		
Total Estimated Technical Systems　　　　　**Hours:　6,544**		
Total Estimated CLEMIS　　　　　**Hours:　　69**		
Total Estimated Internal Services　　　　　**Hours:　　269**		
IT Application Services Division Manager Approval:		**Date:**
IT Technical Systems Division Manager Approval:		**Date:**
IT CLEMIS Division Manager Approval:		**Date:**
IT Internal Services Division Manager Approval:		**Date:**
IT Management Approval:		
Approved:　　　　　　　　　　　Yes　　　　　　No		Date:
Reason:		
Project Sponsor Approval:		
Title:		Date:

PROJECT SUMMARY

Authorized Development (see above)　　　　　**Hours:**		
Preliminary Estimated Development for Future Phases　　**Hours:**		
Grand Total Estimated Development　　　　**Hours: 7,853**　　**Cost: $ 1,295,745**		

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Project Name: O365 Program 2023-2024   **Project ID: TT2186OP**

PROJECT COMPLETION AUTHORIZATION

Customer Acceptance of Product:	
Title:	Date:
Project Office Review:	Date:

O365 Program 2023 - 2024 - Size Estimate (+/- 10% - 50%)

	Type	ID	Task Name	Estimated Hours	Estimate Notes
1	Phase ∨	000000	⊟ O365 Program 2023-2024	7,853	
2					

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Benefits/Savings:							
Tangible Benefits Subtotal:	0	0	0	0	0	0	0
Cost Avoidance Subtotal:	0	0	0	0	0	0	0
Costs:							
Development Services Subtotal:	617,430	688,490	0	0	0	0	1,305,920
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	39,969	12,999	6,257	6,257	6,257	6,257	77,997
Infrastructure Subtotal	0	0	0	0	0	0	0
Training Subtotal:	0	0	0	0	0	0	0
Other Subtotal:	0	0	0	0	0	0	0
Annual Statistics:							
Annual Total Savings	0	0	0	0	0	0	0
Annual Total Costs	657,399	701,489	6,257	6,257	6,257	6,257	1,383,917
Annual Return on Investment	(657,399)	(701,489)	(6,257)	(6,257)	(6,257)	(6,257)	(1,383,917)
Annual Costs/Savings Ratio	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Project Cumulative Statistics:							
Cumulative Total Savings	0	0	0	0	0	0	0
Cumulative Total Costs	657,399	1,358,889	1,365,146	1,371,403	1,377,660	1,383,917	1,383,917
Cumulative Return on Investment	(657,399)	(1,358,889)	(1,365,146)	(1,371,403)	(1,377,660)	(1,383,917)	(1,383,917)
Cumulative Cost/Savings Ratio	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							
Signatures:							
Benefits Reviewed By Project Sponsor				Date:			
Costs (including IT Resources) Reviewed By Information Technology Project Manager				Date:			

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Built in security, Microsoft protects its clients information and is responsible for the secruity of customer data	Intangible Benefit					0	
Improve file share management through existing M365 applications creating a collaborative experience	Intangible Benefit					0	
User-centric design to drive adoption to M365 applications	Intangible Benefit					0	
Hosting services in the cloud allow for accessibility that is a more seamless experience for all workers (remote or in-office) and any device	Intangible Benefit					0	
Increased productivity with Office apps enhanced with the latest AI tools and online file storage.	Intangible Benefit					0	
Built-in privacy and compliance tools.	Intangible Benefit					0	
Tools to collaborate, share, and communicate with cross-functional teams and business units.	Intangible Benefit					0	
Anytime, anywhere access to files.	Intangible Benefit					0	
Minimize duplicate files with a single source of truth	Intangible Benefit					0	
Ability to detect abnormal events	Intangible Benefit					0	
Ability to find out useful but previously unnoticed information.	Intangible Benefit					0	
Ability to analyze larger data to find patterns which were impossible earlier due to the sheer size of data (Big Data)	Intangible Benefit					0	
Elimination of some controls thus releasing manpower (e.g., Lock Tracking in Word eliminates the need to compare documents)	Intangible Benefit					0	

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Utilizing existing manpower for higher level business specific activities rather than mundane but necessary activities (Speak Cells on Enter feature in Excel eliminates the need for supervisors – called Checkers).	Intangible Benefit					0	
						0	
						0	
						0	
						0	
						0	

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Built in security, Microsoft protects its clients information and is responsible for the secruity of customer data	Intangible Benefit												
Improve file share management through existing M365 applications creating a collaborative experience	Intangible Benefit												
User-centric design to drive adoption to M365 applications	Intangible Benefit												
Hosting services in the cloud allow for accessibility that is a more seamless experience for all workers (remote or in-office) and any device	Intangible Benefit												
Increased productivity with Office apps enhanced with the latest AI tools and online file storage.	Intangible Benefit												
Built-in privacy and compliance tools.	Intangible Benefit												
Tools to collaborate, share, and communicate with cross-functional teams and business units.	Intangible Benefit												
Anytime, anywhere access to files.	Intangible Benefit												
Minimize duplicate files with a single source of truth	Intangible Benefit												
Ability to detect abnormal events	Intangible Benefit												
Ability to find out useful but previously unnoticed information.	Intangible Benefit												
Ability to analyze larger data to find patterns which were impossible earlier due to the sheer size of data (Big Data)	Intangible Benefit												
Elimination of some controls thus releasing manpower (e.g., Lock Tracking in Word eliminates the need to compare documents)	Intangible Benefit												

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Utilizing existing manpower for higher level business specific activities rather than mundane but necessary activities													
(Speak Cells on Enter feature in Excel eliminates the need for supervisors – called Checkers).	Intangible Benefit												

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Savings Summary

Benefit/Savings Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Tangible Benefit:							
Tangible Benefits Subtotal:							
Cost Avoidance:							
Cost Avoidance Subtotal:							
Intangible Benefit:							
Built in security, Microsoft protects its clients information and is responsible for the security of customer data							
Improve file share management through existing M365 applications creating a collaborative experience							
User-centric design to drive adoption to M365 applications							
Hosting services in the cloud allow for accessibility that is a more seamless experience for all workers (remote or in-office) and any device							
Increased productivity with Office apps enhanced with the latest AI tools and online file storage.							
Built-in privacy and compliance tools.							
Tools to collaborate, share, and communicate with cross-functional teams and business units.							
Anytime, anywhere access to files.							
Minimize duplicate files with a single source of truth							
Ability to detect abnormal events							
Ability to find out useful but previously unnoticed information.							
Ability to analyze larger data to find patterns which were impossible earlier due to the sheer size of data (Big Data)							
Elimination of some controls thus releasing manpower (e.g., Lock Tracking in Word eliminates the need to compare documents)							
Utilizing existing manpower for higher level business specific activities rather than mundane but necessary activities (Speak Cells on Enter feature in Excel eliminates the need for supervisors – called Checkers).							
Savings Total:							

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?					
								Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development 2022-23	Development Svcs		HR	3,742	165	617,430	1.015	X					
IT Hours - New Development 2023-24	Development Svcs		HR	4,111	165	678,315	1.015		X				
IT Hours - System Maintenance	Development Svcs				165	0							
IT Hours - Customer Support	Development Svcs				165	0							
IT Hours - Planned Maintenance	Development Svcs				165	0							
User Hours - New Development	Development Svcs					0							
User Hours - PTNE/OT	Development Svcs					0							
Contractor Professional Services	Development Svcs					0							
Package Software - Acquisition MS PowerBI	Software		ANN	100	63	6,257		X	X	X	X	X	X
Package Software - Acquisition Migration Tool	Software		EA	4,850	7	33,712		X					

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development 2022-23	Development Svcs	617,430.00					
IT Hours - New Development 2023-24	Development Svcs		688,489.73				
IT Hours - System Maintenance	Development Svcs						
IT Hours - Customer Support	Development Svcs						
IT Hours - Planned Maintenance	Development Svcs						
User Hours - New Development	Development Svcs						
User Hours - PTNE/OT	Development Svcs						
Contractor Professional Services	Development Svcs						
Package Software - Acquisition MS PowerBI	Software	6,257.00	6,257.00	6,257.00	6,257.00	6,257.00	6,257.00
Package Software - Acquisition Migration Tool	Software	33,712.35					

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:							
IT Hours - New Development 2022-23	617,430						617,430
IT Hours - New Development 2023-24		688,490					688,490
IT Hours - System Maintenance							
IT Hours - Customer Support							
IT Hours - Planned Maintenance							
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services							
Development Services Subtotal:	*617,430*	*688,490*					*1,305,920*
Hardware:							
Hardware Subtotal:							
Software:							
Package Software - MS PowerBI	6,257	6,257	6,257	6,257	6,257	6,257	37,542
Package Software - Migration Tool	33,712						33,712
Package Software - Migration Tool Maintenance		6,742					6,742
Software Subtotal:	*39,969*	*12,999*	*6,257*	*6,257*	*6,257*	*6,257*	*77,997*
Infrastructure:							
Infrastructure Subtotal							
Training:							
Training Subtotal:							
Other:							
Other Subtotal:							
Costs Total:	***657,399***	***701,489***	***6,257***	***6,257***	***6,257***	***6,257***	***1,383,917***

Oakland County -- O365 Program 2023-2024

Return on Investment Analysis

Assumptions

Date	Assumption Description
02-Jun-22	Labor rate is estimated at $165/hr.
02-Jun-22	File share migration scope is to migrate 80% of I/J/K/L to the Cloud which is ~26TB of data as of today
02-Jun-22	File share migration will require business areas to identify content to migrate or business will remove data from file share locations
02-Jun-22	Files that are linked are out of scope for the file share migration
02-Jun-22	Short blackout periods to access files migrating from file share locations to OneDrive/SharePoint Online
02-Jun-22	Business areas will continue to adopt Microsoft 365 applications