

**PROFESSIONAL SERVICES AGREEMENT BETWEEN  
THE CITY OF DORAL  
AND  
IMAGER SOFTWARE, INC  
FOR  
MICROSOFT OFFICE 365 TRANSITION SUPPORT SERVICE**

**THIS AGREEMENT**, dated as of the 18 day of May, 2017, is made between IMAGER SOFTWARE, INC. a Florida corporation, (hereinafter the “Consultant”), and the **CITY OF DORAL, FLORIDA**, a Florida municipal corporation, (hereinafter the “City”).

**WHEREAS**, the Consultant and City, through mutual negotiation, have agreed upon a scope of services, schedule, and fee for Microsoft Office 365 Transition Support Service (the “Project”); and

**WHEREAS**, the City desires to engage the Consultant to perform the services specified below.

**NOW, THEREFORE**, in consideration of the mutual covenants and conditions contained herein, the Consultant and the City agree as follows.

**1. Scope of Services/Deliverables.**

- 1.1 The Consultant shall furnish professional services to the City as set forth in the Scope of Services..
- 1.2 The “Scope of Services” includes a Project Schedule for the Project which includes a breakdown of tasks, timeline and deliverables to the City.

**2. Term/Commencement Date.**

- 2.1 This Agreement shall become effective upon execution by both parties and shall remain in effect through September 30, 2017, unless earlier terminated in accordance with Paragraph 8. The City Manager may extend the term of this Agreement up to an additional 180 days by written notice to the Consultant
- 2.2 Consultant agrees that time is of the essence and Consultant shall complete each deliverable for the Project within the timeframes set forth in the Project Schedule, unless extended by the City Manager.

**3. Compensation and Payment.**

- 3.1 The Consultant shall be compensated in the following manner:

On a time and material/expense basis to complete the Scope of Services, provided, however, that total payments to Consultant shall not exceed \$24,741.00, without the prior written approval of the City. Consultant shall submit its bills in arrears upon the completion of each task or deliverable in accordance with the Project Schedule or on a monthly basis in a form approved by the City. The bills shall show or include: (i) the task(s) performed; (ii) the time devoted to the task(s); (iii) the hourly rate or rates of the persons performing the task(s); and (iv) copies of receipts for reimbursable materials/expenses, if any. Expenses not expressly authorized by the Agreement shall not be reimbursed.

- 3.2 The City shall pay Consultant in accordance with the Florida Prompt Payment Act.
- 3.3 If a dispute should occur regarding an invoice submitted, the City Manager may withhold payment of the disputed amount and may pay to the Consultant the undisputed portion of the invoice. Upon written request of the Finance Director, the Consultant shall provide written documentation to justify the invoice. Any compensation disputes shall be decided by the City Manager whose decision shall be final.

4. **Subconsultants.**

- 4.1 The Consultant shall be responsible for all payments to any sub-consultants and shall maintain responsibility for all work related to the Project.
- 4.2 Any sub-consultants used on the Project must have the prior written approval of the City Manager or his designee.

5. **City's Responsibilities.**

- 5.1 Furnish to Consultant, at the Consultant's written request, all available maps, plans, existing studies, reports and other data pertinent to the services to be provided by Consultant, in possession of the City.
- 5.2 Arrange for access to and make all provisions for Consultant to enter upon real property as required for Consultant to perform services as may be requested in writing by the Consultant (if applicable).

6. **Consultant's Responsibilities.**

6.1 The Consultant shall exercise the same degree of care, skill and diligence in the performance of the Project as is ordinarily provided by a professional under similar circumstances. If at any time during the term of this Agreement or within one year from the completion of the Project, it is determined that the Consultant's deliverables are incorrect, defective or fail to conform to the Scope of Services of the Project, upon written notification from the City Manager, the Consultant shall at Consultants sole expense, immediately correct the work. The City in no way assumes or shares any responsibility or liability of the Consultant or Sub Consultant under this agreement.

7. **Conflict of Interest.**

7.1 To avoid any conflict of interest or any appearance thereof, Consultant shall not, for the term of this Agreement, represent any private sector entities (developers, corporations, real estate investors, etc.), with regard to any City related matter.

8. **Termination.**

8.1 The City Manager without cause may terminate this Agreement upon thirty (30) days written notice to the Consultant, or immediately with cause.

8.2 Upon receipt of the City's written notice of termination, Consultant shall stop work on the Project.

8.3 In the event of termination by the City, the Consultant shall be paid for all work accepted by the City Manager up to the date of termination, provided that the Consultant has first complied with the provisions of Paragraph 8.4.

8.4 The Consultant shall transfer all books, records, reports, working drafts, documents, maps, and data pertaining to the Project to the City, in a hard copy and electronic format specified by the City within 14 days from the date of the written notice of termination or the date of expiration of this Agreement.

9. **Insurance.**

9.1 The Consultant shall secure and maintain throughout the duration of this Agreement insurance of such type and in such amounts as required by Exhibit A. The insurance carrier shall be qualified to do business in the State of Florida and have agents upon whom service of process may be made in the State of Florida.

9.2 Certificates of Insurance shall be provided to the City at the time of execution of this Agreement and certified copies provided if requested. Each policy certificate shall be endorsed with a provision that not less than thirty (30) calendar days' written notice shall be provided to the City before any policy or coverage is cancelled or restricted, or in accordance to policy provisions. The City further reserves the right to solicit additional coverage, or require higher limits of liability as needed, and depending on the nature of scope, or level of exposure.

10. **Nondiscrimination.**

10.1 During the term of this Agreement, Consultant shall not discriminate against any of its employees or applicants for employment because of their race, color, religion, sex, or national origin, and to abide by all Federal and State laws regarding nondiscrimination

11. **Attorneys' Fees and Waiver of Jury Trial.**

11.1 In the event of any litigation arising out of this Agreement, each party shall be responsible for their attorneys' fees and costs, including the fees and expenses of any paralegals, law clerks and legal assistants, and including fees and expenses charged for representation at both the trial and appellate levels.

11.2 In the event of any litigation arising out of this Agreement, each party hereby knowingly, irrevocably, voluntarily and intentionally waives its right to trial by jury.

12. **Indemnification.**

12.1 Consultant shall defend, indemnify, and hold harmless the City, its officers, agents and employees, from and against any and all demands, claims, losses, suits, liabilities, causes of action, judgment or damages, arising out of, related to, or any way connected with Consultant's performance or non-performance of any provision of this Agreement including, but not limited to, liabilities arising from contracts between the Consultant and third parties made pursuant to this Agreement. Consultant shall reimburse the City for all its expenses including reasonable attorneys' fees and costs incurred in and about the defense of any such claim or investigation and for any judgment or damages arising out of, related to, or in any way connected with Consultant's performance or non-performance of this Agreement. This section shall be interpreted and construed in a manner to

comply with any applicable Florida Statutes, including without limitation Sections 725.06 and 725.08, Fla. Stat., if applicable.

12.2 The provisions of this section shall survive termination of this Agreement.

12.3 Ten dollars (\$10) of the payments made by the City constitute separate, distinct, and independent consideration for the granting of this indemnification, the receipt and sufficiency of which is voluntary and knowingly acknowledged by the Consultant.

13. **Notices/Authorized Representatives.**

13.1 Any notices required by this Agreement shall be in writing and shall be deemed to have been properly given if transmitted by hand-delivery, by registered or certified mail with postage prepaid return receipt requested, or by a private postal service, addressed to the parties (or their successors) at the following addresses:

For the City: Edward A. Rojas  
City Manager  
City of Doral, Florida  
8401 NW 53rd Terrace  
Doral, Florida 33166

With a Copy to: Daniel A Espino, Esq.  
City Attorney  
Weiss Serota Helfman  
Pastoriza Cole & Boniske, P.L.  
2525 Ponce De Leon Boulevard, 7<sup>th</sup> Floor  
Coral Gables, FL 33134

For The Consultant: Edwin Lott  
Managing Partner, Consulting Services  
Imager Solutions, Inc.  
2932 Wellington Circle  
Tallahassee, FL 32309

14. **Governing Law.**

14.1 This Agreement shall be construed in accordance with and governed by the laws of the State of Florida. Exclusive venue for any litigation arising out of this Agreement shall be in Miami-Dade County, Florida.

15. **Entire Agreement/Modification/Amendment.**

15.1 This writing contains the entire Agreement of the parties and supersedes any prior oral or written representations. No representations were made or relied upon by either party, other than those that are expressly set forth herein.

15.2 No agent, employee, or other representative of either party is empowered to modify or amend the terms of this Agreement, unless executed with the same formality as this document.

16. **Ownership and Access to Records and Audits.**

16.1 All records, books, documents, maps, data, deliverables, papers and financial information (the "Records") that result from the Consultant providing services to the City under this Agreement shall be the property of the City.

16.2 The City Manager or his designee shall, during the term of this Agreement and for a period of three (3) years from the date of termination of this Agreement, have access to and the right to examine and audit any Records of the Consultant involving transactions related to this Agreement.

16.3 The City may cancel this Agreement for refusal by the Consultant to allow access by the City Manager or his designee to any Records pertaining to work performed under this Agreement that are subject to the provisions of Chapter 119, Florida Statutes.

17. **Nonassignability.**

17.1 This Agreement shall not be assignable by Consultant unless such assignment is first approved by the City Manager. The City is relying upon the apparent qualifications and personal expertise of the Consultant, and such firm's familiarity with the City's area, circumstances and desires.

18. **Severability.**

18.1 If any term or provision of this Agreement shall to any extent be held invalid or unenforceable, the remainder of this Agreement shall not be affected thereby, and each remaining term and provision of this

Agreement shall be valid and be enforceable to the fullest extent permitted by law.

19. **Independent Contractor.**

19.1 The Consultant and its employees, volunteers and agents shall be and remain independent contractors and not agents or employees of the City with respect to all of the acts and services performed by and under the terms of this Agreement. This Agreement shall not in any way be construed to create a partnership, association or any other kind of joint undertaking, enterprise or venture between the parties.

20. **Compliance with Laws.**

20.1 The Consultant shall comply with all applicable laws, ordinances, rules, regulations, and lawful orders of public authorities relating to the Project.

21. **Waiver**

21.1 The failure of either party to this Agreement to object to or to take affirmative action with respect to any conduct of the other which is in violation of the terms of this Agreement shall not be construed as a waiver of the violation or breach, or of any future violation, breach or wrongful conduct.

22. **Survival of Provisions**

22.1 Any terms or conditions of either this Agreement that require acts beyond the date of the term of the Agreement, shall survive termination of the Agreement, shall remain in full force and effect unless and until the terms or conditions are completed and shall be fully enforceable by either party.

23. **Prohibition of Contingency Fees.**

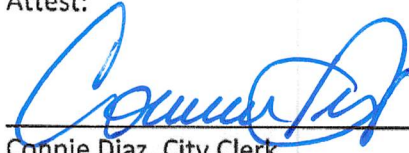
23.1 The Consultant warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Consultant, to solicit or secure this Agreement, and that it has not paid or agreed to pay any person(s), company, corporation, individual or firm, other than a bona fide employee working solely for the Consultant, any fee, commission, percentage, gift, or any other consideration, contingent upon or resulting from the award or making of this Agreement.

24. **Counterparts**

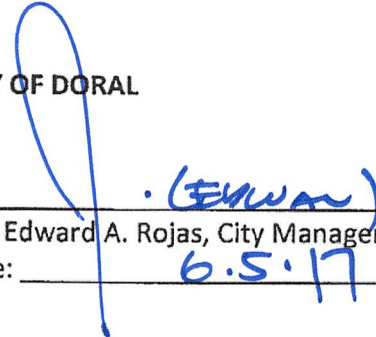
24.1 This Agreement may be executed in several counterparts, each of which shall be deemed an original and such counterpart shall constitute one and the same instrument.

IN WITNESS WHEREOF, the parties execute this Agreement on the respective dates under each signature: The City, signing by and through its City Manager, attested to by its City Clerk, duly authorized to execute same and by Consultant and through its representative, who has been duly authorized to execute same.


Attest:

  
\_\_\_\_\_  
Connie Diaz, City Clerk

CITY OF DORAL

By:   
\_\_\_\_\_  
Edward A. Rojas, City Manager  
Date: 6.5.17

Approved As To Form and Legal Sufficiency for the Use  
And Reliance of the City of Doral Only:

  
\_\_\_\_\_  
Weiss Serota Helfman Pastoriza Cole & Bonsike, PL  
City Attorney

IMAGER SOFTWARE, INC

By:   
\_\_\_\_\_  
Edwin Lott  
Managing Partner, Consulting Services  
Date: 5/19/17



**SCOPE OF SERVICES**

**SEE ATTACHED ISC STATEMENT OF WORK**

**OFFICE 365 TRANSITION SERVICES**



# ISC Statement of Work

*Office 365 Transition Services*



Prepared for City of Doral

April 21, 2017

Prepared by Edwin Lott  
Managing Partner, ISC  
[Edwin.Lott@goisc.com](mailto:Edwin.Lott@goisc.com)

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# Introduction

ISC is pleased to submit our proposal to City of Doral to provide Microsoft Office 365 Transition Support Services.

ISC assists customers with Office 365 (O365) planning, provisioning, deployment, migration, and post-migration support. Based in Tallahassee, Florida, since 1990, ISC is an Information Technology consulting and software development services company.

ISC is an approved and certified Microsoft Cloud Deployment Partner, Microsoft Cloud Champion Partner, and Microsoft Cloud Solutions Provider, having achieved the highest designation of Tier 1. In addition, ISC is a Microsoft Gold Partner. Microsoft recognizes ISC as a valued partner, recently writing to a client: ***“ISC has a strong track record of successful Office 365 implementations and also belongs to an exclusive Microsoft Partner Program called the Small to Medium Size Business Champions Club at the highest competency level. I know you will be impressed with their technical aptitude and professionalism.”***

A short list of ISC’s accomplishments and core competencies includes:

- Premier Microsoft Cloud Accelerate Partner with the following competencies:
  - Gold Cloud Productivity
  - Gold Application Development
  - Silver Cloud Platform
  - Silver Small and Midmarket Cloud Solutions
- ISC is a Microsoft Cloud Deployment Partner certified to participate in the FAST TRACK deployment program.
- ISC is well versed in CJIS & HIPAA compliance matters particular to Office 365.

ISC's consultants have at least 20 years of experience. ISC has additional experience and qualifications in providing IT services that require zero downtime or interruption in business operations. This is especially important for law enforcement agencies conforming to CJIS law enforcement standards.

## Project Overview

### City of Doral Office 365 Migration

- Conduct an Office 365 Network Readiness analysis
- Setup and Provision Office 365 Tenant
- Setup and Configure Windows Active Directory Sync using Azure AD Connect
- Configure and Validate Exchange 2013 Hybrid Government Cloud on existing Server for Coexistence
- Verify Click-to-Run Packages for Office 2016 Distribution
- Perform testing of Coexistence (Mail flow, Free/Busy, Outlook Permissions)
- Conduct 1 Early Adopter Migration of up to 5 Users
- Conduct 1 Pilot Migration of up to 30 Users
- Perform Migration of 315 User Mailboxes
- Provide Brainstorm QuickHelp™ 90-Day Free Subscription for User Training for Office 365
- Provide 16 hours of post migration support using a bridge line for day after velocity migrations
- Dedicated team working remotely with your IT professionals throughout every stage of the O365 migration

## Recommended Migration Strategy

Email migration is the process of moving your existing mailbox content to O365 and Exchange Online. Although there are several ways to migrate to O365 based on an organization's needs and environment, ISC will configure a workstation using a third-party migration tool. This will allow ISC to perform dry run migrations to estimate the migration velocity and establish the maximum number of mailboxes that can be run within the migration window of 6pm till 6am weekdays.

The ultimate goal of the migration process is to have a unified migration experience for end users with minimal impact to their daily routines.

ISC will use our highly successful approach for the O365 migration, customized to your needs, and presented in five phases that:

- Migrate current mailboxes to O365 using an Exchange 2013 server (configured as a hybrid) in online suspended mode;
- Present detailed timeframes to control the pace of the migration while keeping individual tasks serialized; and
- Identify clear expectations of what must be done by ISC and Customer.

The five project phases, *Discovery*, *Remediate & Enable*, *Plan*, *Prepare & Test*, and *Migrate*, are discussed in detail in this proposal.



This Statement of Work ("SOW") and any exhibits, appendices, schedules, and attachments the terms of which are incorporated herein by reference, by and between Customer and ISC sets forth the services to be performed by ISC related to the Office 365 Transition project.

The purpose of the SOW is to define the scope, services, service deliverables, and management approach for transitioning email services through the Discovery, Remediate and Enable, Plan, Prepare and Test, and Migrate steps of the project. ISC has a specific prescribed methodology and approach for this project, which includes migrating approximately 350 active user mailboxes from the current environment to Microsoft O365 Exchange Online. The project will include all activities to conduct a Velocity Migration.

All changes to the SOW will be managed in accordance with the change management process defined in this document. Project success will be highly dependent on successful and timely completion of Customer responsibilities and on effective collaboration between the Customer and ISC.

The ISC proposal is valid for 90 days from the date of submission. We look forward to a successful partnership in your O365 migration. The authorized person regarding our proposal is:

Edwin Lott, Engagement Manager

ISC Managing Partner, Cloud & Consulting Services

2601 Blair Stone Road, Building C Suite 1

Tallahassee, FL 32309

Office: 850.893.6741

Cell: 850.566.8421

[Edwin.Lott@goisc.com](mailto:Edwin.Lott@goisc.com)

## ISC's Qualifications

Microsoft Office 365 brings together cloud hosted services of our most trusted communications and collaboration products with the latest version of the Microsoft Office Professional Plus desktop suite. Microsoft hosts, operates and maintains the platform, so it remains current, replicated and highly available while customers pay low monthly subscription fees. The Office 365 solution includes the following cloud-based services:

- Microsoft Exchange Online
- Microsoft SharePoint® Online
- Microsoft Skype for Business
- Microsoft Office Professional Plus

ISC is an experienced cloud platform service provider that is utilizing and providing services related to cloud computing since 2009. Today, ISC stands apart as a company that runs on cloud-based systems, understands Microsoft's cloud platforms, and works with them every day. The ISC Cloud Services Team provides organizations with full transition support services as they migrate from on and off premise environments to on-premise private cloud or hosted cloud services since 2009.

ISC has over 245 customers and thousands of licensed seats to which it provides Office 365 related services including email migration, SharePoint build outs, and training. If you want to see a customized web site running on SharePoint/Office 365, look at ISC's website at <http://www.goisc.com>.

ISC is a 12-year Microsoft Gold Partner, a Microsoft Managed Partner, a Microsoft Cloud Deployment Partner, a Microsoft FastTrack Partner, and Microsoft Cloud Champion Partner - Tier 1, and a Microsoft Cloud Solutions Provider – Tier 1. Our team is ready to support you with onsite deployment planning, preparation, and 24X7-email migration management. As a Cloud Champions partner, ISC has unique partner-only access to Office 365 support during migrations that is not available to customers or other partners. Our long track record and expertise in transitioning organizations to the Microsoft Cloud is an important factor for you to consider in your organizations transition planning.

ISC plays an important role during your transition by advising on potential migration paths to the online service based on your unique requirements. ISC utilizes industry leading tools to limit interruption to your operations during your transition. Our team has extensive experience and in-depth knowledge of the latest tools and technologies from well-known companies such as Priasoft, Microsoft, Migration Wizard, Binary Tree E2E and the Microsoft Move Tool. We select only the best of breed based upon the customer's source environment, desired migration approach and the customer's target environment.

## ISC's Proven Experience

Over the past five years, ISC has successfully prepared for migration and migrated over 245 customers and thousands of mailboxes to Exchange 2010 private cloud and O365 Office 2013 from environments including Exchange 2003, 2007, 2010, Lotus Notes, and GroupWise. ISC is one of the very few partners with the experience and expertise to perform large and complex migrations to the Microsoft cloud. Our Microsoft Certified Architect has migrated over one million mailboxes to the Microsoft cloud offerings since their inception in 2005. ISC is actively migrating customers to the cloud on a weekly basis. A sample of our current and completed migrations to private clouds and O365 include:

By industry, ISC has migrated the following to Office 365 and private cloud environments:

- Small-to-Medium Business (SMB): over 20,000 seats and over 75 SMB systems
- Government: over 65,000 state and local government employee email accounts
- Higher Education: over 1.4 million (faculty, staff, and student) mailboxes
- Local Education: over 40,000 school district (faculty, staff, and student) mailboxes
- Healthcare: over 13,650 mailboxes
- Law Enforcement: over 13,700 mailboxes
- Achieved velocity migrations of over 500 mailboxes per night

### Florida State Agencies:

- Department of Corrections – 22,000 mailboxes
- Executive Office of the Governor – 180+ mailboxes with desktop rollout
- Department of Agriculture – 4,400 mailboxes with desktop rollout
- Florida Fish and Wildlife Conservation Commission – 2,700+ mailboxes with desktop rollout
- Department of Juvenile Justice – 4,000+ mailboxes with desktop rollout
- Department of Children and Families – 12,500+ Lotus Notes mailboxes with desktop rollout
- State of Florida Enterprise email migration planning, preparing and migration services across 32 agencies
- Department of Highway Safety and Motor Vehicles – 6,000+ mailboxes and 2.5TB archive
- Department of Economic Opportunity – 2,700 mailboxes and 3.75TB archive
- Agency for Persons with Disabilities – Lotus Notes email (2,027 mailboxes) and 2.5TB archive
- Department of Elder Affairs – GroupWise email and archive (750 mailboxes)
- Department of Education – Email and public folders (2,400 mailboxes)



- Department of State – Email and public folders (625 mailboxes)
- Department of Citrus – Email and shared folders (80 mailboxes)

#### Local Government:

- City of Gulfport, Florida - 114 users migrated from Exchange 2007 using the Microsoft Move Tool
- City of Panama City Beach, FL – 115 users migrated from Exchange 2010
- Clay County, Florida – 515 users from Exchange 2007

#### Educational Institutions:

- Florida State University – 115,055 seats
- Florida State College Jacksonville – 253,514 seats
- University of North Florida – 47,661 seats
- Tallahassee Community College – 25,000 students and 3,000 faculty and staff
- Leon County School District – 40,000 seats
- Hinds Community College, MS – 76,957 seats

## References

ISC is pleased to provide the following references for Office 365 migrations. We urge you to contact these clients regarding our services and our team. Additional references are available upon request.

### Reference 1 – Florida Department of Children and Families

Florida Department of Children and Families  
 Don Sherman, Director, Operations & Enterprise Services  
 1940 N. Monroe St., Suite 80 Tallahassee, Florida 32399  
 Office (850) 320-9270; Cell (850) 491-1874  
[Don.Sherman@myflfamilies.com](mailto:Don.Sherman@myflfamilies.com)

SERVICES: July 2014 –January 2015. Migration of Lotus Notes email (12.500 mailboxes).

### Reference 2 – Florida Department of Education

Florida Department of Education  
 Ted Duncan, Deputy CIO  
 (850) 245-9828  
[Ted.Duncan@fldoe.org](mailto:Ted.Duncan@fldoe.org)

SERVICES: May – September 2013. Migration (2,400 mailboxes) from Exchange 2003 to O365 Cloud Services, using VIS (virtual identity server) to support un-migrated divisions, and hybrid server for co-existence.

### Reference 3 – Florida Department of Juvenile Justice

Florida Department of Juvenile Justice

Olu B. Oyewole, MBA, CPM

(850) 717-2316

[Olu.Oyewole@djj.state.fl.us](mailto:Olu.Oyewole@djj.state.fl.us)

SERVICES: October 2014 – February 2015. Hybrid configuration for migration of 3,700+ mailboxes and 27GB of public folder data, assist with developing SCCM package to deploy Office 2013 to desktops, enable Skype (Lync) on desktops, enable SharePoint Online, advice on migration of 5TB of MailStore archives.

### Reference 4 – Florida Department of Highway Safety & Motor Vehicles

Florida Department of Highway Safety & Motor Vehicles

Carrin Smith, Senior Project Manager

(850) 617-2142

[CarrinSmith@flhsmv.gov](mailto:CarrinSmith@flhsmv.gov)

SERVICES: May – July 2014. Migration of 5,000+ user mailboxes from Exchange 2003 to O365 Cloud Services (including 1,800 mobile computer devices in trooper vehicles) using hybrid server for co-existence, and migration of 2.76TB of NearPoint Mimosa archive.

# Project Scope

The scope of the project includes the planning, prepare, and migration of the mailboxes shown below from the legacy messaging environment to O365 Exchange Online.

<i>Legacy Platform</i>	<i>Version</i>	<i>Mailbox Quantity and Type</i>
☒ Microsoft Exchange	Exchange 2010	350 Mailboxes

ISC will provide the services described in TABLE 1 below. The items in the Out of Scope column will not be provided by ISC.

TABLE 1: PROJECT SCOPE OF WORK

<i>Work Item</i>	<i>In Scope and Assumptions</i>	<i>Out of Scope</i>
<b>Project Management</b>	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• Provide Project Management throughout the life cycle of the project.</li> <li>• Provide master project plan with detailed schedule of all project elements.</li> <li>• Compile weekly status reports for distribution to the project team.</li> <li>• Weekly status meetings will be held to review project status.</li> <li>• Identify, analyze and prioritize risks and issues that need to be actively managed.</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• The Vendor Project Manager will work with the Customer Project Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Manage or execute Steering Committee meetings or status reports for Executive Leadership.</li> <li>• Develop and/or distribute communications for end users.</li> <li>• Grouping or validation of the customers Migration list.</li> </ul>
Server Setup and Configuration	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• Verify current setup and configuration of servers interfacing the City of Doral network with O365.</li> <li>• Active Directory Federated Services, Directory Synchronization (WAADS), Simple Mail Transfer Protocol (SMTP) services, Exchange 2013 Domain Name System (DNS) entries.</li> <li>• Site preparedness for Office 365 email migration.</li> <li>• Verify configuration of the Office 365 tenant.</li> </ul>	<ul style="list-style-type: none"> <li>• Active Directory (AD) design, installation, and configuration, including trusts and site definitions</li> <li>• Multi-forest consolidation including consolidating or decommissioning existing AD domains or domain controllers (if any)</li> <li>• Active Directory OU restructuring, workstation migration, group policy</li> </ul>

<b>Work Item</b>	<b>In Scope and Assumptions</b>	<b>Out of Scope</b>
	<ul style="list-style-type: none"> <li>• Verify Click-to-Run packages and distributions for the Office 2016 Suite created by City of Doral.</li> <li>• Network connectivity as it relates to Office 365.</li> <li>• Verification of Cutover Migration Readiness</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• ISC will perform the Office ProPlus deployment using Click-to-Run</li> <li>• One Active Directory/Forest(s) containing all users</li> <li>• Recommended changes to directory can be accomplished in the time allotted</li> <li>• All mail-enabled users, contacts and groups will be synchronized to O365</li> </ul>	<p>change within any existing AD domains</p> <ul style="list-style-type: none"> <li>• Attribute changes in AD to allow for filtering of objects with WAADS</li> <li>• Implementing AD changes required to get a complete sync</li> <li>• WAADS customization</li> <li>• Developing Click-to-Run package for patching desktops</li> <li>• Execution of Click-to-Run deployment packages</li> <li>• Installing any non-Office 365 related desktop applications</li> <li>• Tier 1 or Tier 2 support Desktop support</li> <li>• Public Folder post migration remediation based on known tool limitations</li> <li>• Migration of mail-enabled security groups</li> </ul>
Pilot Migration	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• ISC will develop and deliver a Pilot.</li> <li>• Early adopter Migration of 5 existing mailboxes</li> <li>• Pilot Migration of 30 existing mailboxes</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• Encryption, antivirus, and spam management solutions should be in place and part of pilot solution.</li> </ul>	<ul style="list-style-type: none"> <li>• Developing remediation package for desktops</li> <li>• Execution of deployment packages</li> <li>• Installing any non-Office 365 related desktop applications</li> </ul>
O365 Migration	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• Cutover Migration for 345 User mailboxes</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• ISC access to the system via VPN or terminal services</li> </ul>	<ul style="list-style-type: none"> <li>• Migration of any PST files, personal archives or non-server side data.</li> <li>• Locally stored user content including stored contacts and journals</li> <li>• Migration of groups and distribution lists related to security groups</li> </ul>

<b>Work Item</b>	<b>In Scope and Assumptions</b>	<b>Out of Scope</b>
	<ul style="list-style-type: none"> <li>• Customer will provide the velocity migration list 2 weeks in advance of cutover migrations</li> <li>• A mailbox consists of a single user database with a corresponding mailbox in O365</li> <li>• Mailbox content in scope for migration is limited to mail items, calendar items, folder structure, tasks, and contacts that end-users have synchronized to their server-based mailbox</li> <li>• A shared mailbox is a database shared by one or more users or groups that will have a corresponding user/mailbox in the O365 environment</li> </ul>	<ul style="list-style-type: none"> <li>• Application coexistence</li> <li>• Application inventory</li> <li>• Application testing lab</li> <li>• Facilitation of communication with application owners</li> <li>• Scheduling application testing</li> <li>• Remediating applications</li> <li>• Remediation of incompatible Office ProPlus Add-ins</li> </ul>
<p>Conversion of Any\All Distribution Lists to Office 365</p>	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• Conversion of existing groups and distribution lists that meet the criteria in the assumptions below</li> <li>• Conversion of mail enabled security groups is not supported as permissions would be lost.</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• Only Distribution Lists can be converted</li> <li>• Distribution Lists that are members of Security groups cannot be converted</li> <li>• Distribution Lists cannot contain any security groups.</li> <li>• Distribution Groups that don't have owners will need a default owner assigned</li> </ul>	<ul style="list-style-type: none"> <li>• Conversion of groups and distribution list settings beyond what is supported by Office 365.</li> <li>• Conversion to "Office 365 Unified Groups"</li> </ul>
<p>Public Folders Option #1</p>	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• Re-direction of Outlook 2007/2010/2013/2016 clients to the on premise Public Folders.</li> <li>• Configuration of the Database and mailbox used for Public Folder redirection</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• Only Existing Public Folders will be used</li> <li>• Public folder replication is healthy</li> </ul>	<ul style="list-style-type: none"> <li>• Access to re-directed Public folders by OWA clients</li> <li>• Patching Outlook 2010 or 2007 clients to enable this feature</li> <li>• Installation of the CAS service on each mailbox server hosting public folders.</li> <li>• Public Folders hosted on Exchange 2003 servers cannot be used.</li> </ul>

<b>Work Item</b>	<b>In Scope and Assumptions</b>	<b>Out of Scope</b>
	<ul style="list-style-type: none"> <li>• The CAS role will need to be installed on all mailbox servers that host public folders (Excluding Exchange 2007)</li> </ul>	<ul style="list-style-type: none"> <li>• Limitations imposed by Office 365 public folders</li> </ul>
Option #2	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• Public folder redirection must be implemented before migration of content can begin</li> <li>• Public folders will be migrated to the cloud at the end of the velocity mailbox migration phase.</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• Migration per limits of Office 365 public folders (1TB total, 45GB per folder and 2GB per item)</li> <li>• Public folder rules are not used</li> </ul> <p>User's shortcuts will need to be re-created if they made them.</p>	<ul style="list-style-type: none"> <li>• Access to re-directed Public folders by OWA clients until the public folders are migrated.</li> <li>• Limitations imposed by Office 365 public folders.</li> </ul>
Option #3	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• Synchronization of existing public folders using a 3<sup>rd</sup> party tool.</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• Only Existing Public Folders will be used</li> <li>• Public folder replication is healthy</li> </ul> <p>User's shortcuts will need to be re-created if they made them.</p>	<ul style="list-style-type: none"> <li>• Limitations imposed by Office 365</li> <li>• Limitations of 3<sup>rd</sup> party software.</li> <li>• Limitations of synchronization as it applies to time sensitive transactional public folders.</li> </ul>
End-User Training	<ul style="list-style-type: none"> <li>• ISC and Brainstorm will provide a Free 90-Day Office 365 Training subscription to all End-Users</li> </ul>	<ul style="list-style-type: none"> <li>• On-site training</li> </ul>
Support	<p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• ISC will provide 16 hours of post-migration support</li> <li>• ISC will deliver the following scope: <ul style="list-style-type: none"> <li>- ISC will provide a team to work remotely throughout the project.</li> <li>- Provide support 24x7 to Company staff, throughout the project.</li> <li>- ISC will provide post migration support, following each group of mailbox migrations.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Non-Office 365 related desktop remediation and support</li> </ul>

<i>Work Item</i>	<i>In Scope and Assumptions</i>	<i>Out of Scope</i>
	<ul style="list-style-type: none"> <li>ISC will provide a recap and summary of all support issues including statistics on resolution.</li> </ul>	

Any areas not specifically shown in Table 1 that are **out of scope** for this engagement include, but are not limited to, those listed below.

### Areas Out of Scope

- Modifications to the O365 service beyond the configurable options as described herein
- Overall program and project management for Customer activities and resources
- Help Desk and End-user communications and documentation
- Application co-existence configuration necessary on the application side
- Management, configuration and activation of mobile devices
- Decommission of existing Exchange 2010 environment
- Design, procurement, installation, and configuration of hardware, software, networks, licenses, except as explicitly defined in this SOW
- Configuration, packaging, and distribution of client software, upgrades, or patches required for O365 service
- Rationalization and definition of group policies
- Creation of rooms and resources objects, or any migration activity associated with rooms and resources except for migration of calendar content and future reservations

### Required Environments

The required environments necessary to provide the services including location, responsibility, and timing of those environments, are shown in TABLE 2. Customer is responsible for installation of these server environments and the configuration of base operating system and application of appropriate patches. The ISC Team is responsible for validating the installation of associated services on these environments.

TABLE 2: REQUIRED ENVIRONMENTS

<i>Environment</i>	<i>Location</i>	<i>Responsibility</i>	<i>Ready By</i>
Microsoft Office 365 Windows Azure Active Directory Service (WAADS) with password sync	Customer	Customer	Plan Phase
Office 365 Tenant	Microsoft Online Services	Customer	Prepare Phase
Exchange Online Protection	Microsoft Online Services	ISC	Prepare Phase

### Training and Knowledge Transfer

The ISC standard methodology includes significant knowledge transfer, primarily through informal means. Informal knowledge transfer is defined as customer employees, associates, or contractors working with ISC personnel, and may include activities such as email threads, conference calls, and facilitated meetings on technical topics. ISC will work closely with Customer IT staff throughout the project, providing knowledge

transfer on virtually a daily basis. ISC will also provide considerable knowledge transfer and documentation in areas such as Help Desk, Communicating with Stakeholders, and Communications with End-Users. In addition, ISC will provide on-site post migration support for the pilot and the velocity migrations. ISC will provide training for administrators that includes:

- O365 Architecture Overview, including premise-based components
- Managing email accounts in O365
- Performing e-discovery searches

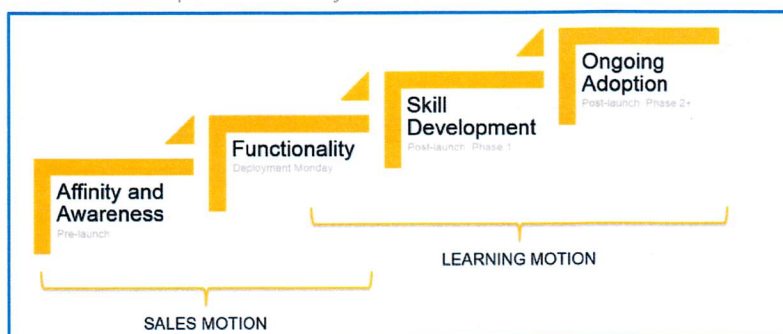
### End User Training

Microsoft Office 365 applications offer organizations robust functionality in increasing communication and productivity. Skype for Business coupled with the powerful features of Microsoft Office platform, including OneDrive and OneNote, is designed to increase productivity within an organization by introducing job-enhancing features and collaboration capabilities. City of Doral looks to increase end user productivity as they embark upon this significant change in the way they work, communicate, and collaborate by leveraging BrainStorm resources including QuickHelp™ to drive adoption of the suite of new tools. The following is a recommended approach to empower global users to embrace Office 365 and build skills to leverage the powerful capabilities in the integrated Microsoft productivity and collaboration platform.

### End User Training Scope

ISC and BrainStorm will collaborate with City of Doral to deploy QuickHelp™ approximately 350 users across the enterprise through one or more means from a unique Company web portal that meets users' needs wherever they work and whenever they need quick answers. A dedicated Client Success Manager from Brainstorm will work with City of Doral to build a QuickHelp engagement roadmap to keep pace with the ongoing changes introduced to the productivity software that employees use every day, mitigating user frustration and the dip in productivity which accompanies change—while ensuring users are exposed to great new capabilities that will enhance efficiency and light up enterprise collaboration.

### End User Adoption Journey



Reaching end users  
at their moments  
of need



## Building an Engagement roadMAP for Success

BrainStorm has worked with many enterprise customers from multiple industries to build a comprehensive training plan to support their Exchange to Office 365 deployments. Clients include those who are migrating from Exchange on premise to Office 365 Exchange online, also upgrading 1, 2, or 3 Office versions and from XP to Windows 7, 8, and 10, as well as evaluating and deploying Windows 8 devices. This proposal incorporates learnings and best practices from these engagements.

## QuickHelp™ Platform

BrainStorm recommends QuickHelp to City of Doral as the number one resource for change management and productivity support. Hosted in Microsoft's Azure platform, QuickHelp™ is the consummate "just in time" training resource, promoting self-help and reducing Help Desk call volume that often spikes when new software is rolled out. The QuickHelp™ Library includes thousands of short videos (typically 1-3 minutes) covering the following content and more.

BrainStorm QuickHelp™ Video Content				
Outlook 2016	Word 2016	Lync 2016	Windows 7, 8, 10	Yammer
Excel 2016	PowerPoint 2016	Office 365 Online	Dynamics CRM 2016	Project 2016
OneNote 2016	SharePoint 2016	OneDrive for Business	Internet Explorer 10 and 11	Skype for Business 2016

QuickHelp™ is a self-paced, easy-to-use Web-based learning system accessible to your user community via Single Sign On. This approach provides an enhanced user experience in accessing the resources. BrainStorm online video clips deliver answers 24/7 at the user's "moment of need." QuickHelp™ also empowers users to learn to work across the platform, such as how to use Outlook, Skype and OneNote in concert to 'Create a Modern Meeting' that can further drive efficiency across the enterprise.

## QuickHelp™ delivers the following functionality:

Access to more than 3,000 on-demand videos through key word search and also clustered into topics, such as "OneDrive for Business" with 20 videos covering content such as 'What is the Cloud?' and Managing Document Versions in OneDrive.

Ability to edit what's visible to users in the QuickHelp library enabling City of Doral to surface new content in alignment with the introduction of new software.

- Option to upload City of Doral's custom videos to QuickHelp™ creating unique employee learning modules that can then be used stand alone, or included into playlists that are then assigned out for the users to consume.
- Ability to create system groups and opt-in user groups, develop targeted multi-application playlists and assign them to target groups, e.g. new hires might have 30 days from their hire date to watch a cluster of videos that serve as a baseline for all employees to learn about using their productivity software and working smarter

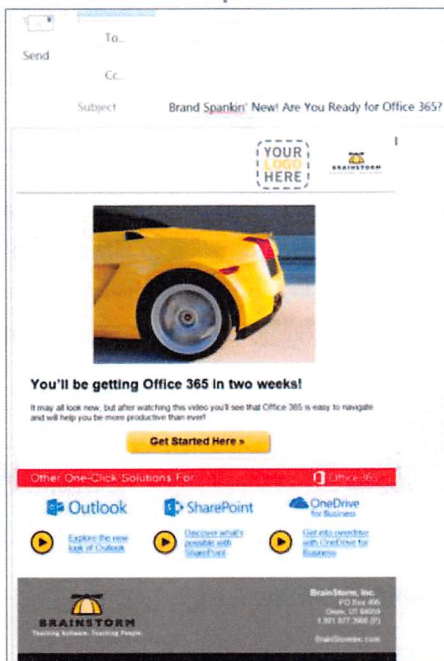
- **User-to-user video sharing capability** to foster a self-help learning culture across the City of Doral organization
- Access by administrators to dashboards and usage reports showing most viewed assets, most active users, and most searched items which can inform a need for additional training
- Real-time dynamic translation of videos through Bing translator so that global users can access closed captioning in their local language

### Complimentary QuickHelp Resources

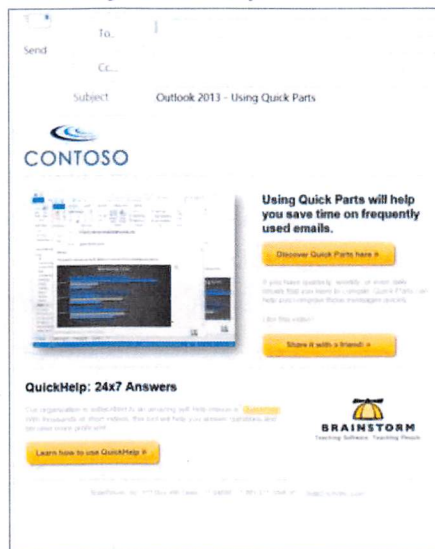
- Dedicated Client Success Manager to collaborate on launch campaigns and ongoing delivery of marketing resources, including web banner and poster templates, *LaunchTips*, monthly *QuickTips* (see samples below), FAQ pages to post to your IT learning portal, playlist development, and more to promote QuickHelp™ usage
- Building best practice playlists for platform deployments. Ex: “Exchange to Outlook First Steps” playlists or courses to use for better support change from one platform to another.
- Invitations too complimentary live, 30-minute monthly *QuickCasts* to expose users to features they might not find on their own, but which will save them time and improve productivity. November’s topic was *How Excel Makes You Look Like Einstein: Using Formulas and Macros*.

### Sample QuickHelp™ Communications

#### T-10 Launch Tip



#### Monthly Quick Tip



### Example: Supporting the End-User Adoption Journey through QuickHelp™

ISC and a BrainStorm Client Success Manager will work in consultation with City of Doral to develop a communications plan to incorporate into the broader organization plan to build awareness, excitement, and readiness for change – and to promote consumption of training resources to drive adoption (high level example below).

- **Phase 1: (Affinity and Awareness) –**
  - Users receive an email announcing the Office 365 ProPlus rollout with important details and planned dates, and availability of training resources—QuickHelp™.
  - Users receive pre-deployment *LaunchTip* emails to build excitement for the change coming their way, along with a pointer to access QuickHelp™ and electronic Quick Start Cards as available.
  
- **Phase 2: (Functionality/Deployment Monday) –**
  - Users receive an email reminding them about how to access and share with one another the “how to” learning content inside of QuickHelp™, helping to accelerate adoption of the training tool, reducing demand on the help desk.
  - Users receive select QuickHelp™ *QuickTip* emails for the next 4 weeks after deployment, at which point cadence will transition to a monthly tip.
  
- **Phase 3 (Skill Development and Ongoing Adoption) –**
  - QuickHelp is utilized by the service desk team to respond to end-user tickets or “how to” inquiries.
  - End users are invited to monthly 30-minute *QuickCasts* covering topics to help them save time and become more productive, e.g. “*Managing the Flood of Email*” and “*Harnessing the Power of Excel 2016.*”
  - Updates and changes to QuickHelp™ playlists are made as business objectives change and new functionality may be emphasized. QuickHelp™ continues to be promoted broadly as a self-help resource to deliver answers at the user’s moment of need to accelerate adoption of the integrated Microsoft platform.

### ISC and BrainStorm Team

ISC and BrainStorm will work with City of Doral to suggest best practices and to help personalize and tailor all content, playlists, and communications to better support the end users as you move to Office ProPlus, as well as drive continued productivity and adoption. QuickHelp is a critical resource for organizations as they support change and drive adoption. We typically see the most positive impact on an organization while actively utilizing the QuickHelp tool.

<b>QUICKHELP ON-DEMAND LEARNING PORTAL   Training and Performance Support</b>
<i>Video-based learning portal with training on Outlook, Office, OneNote, OneDrive, Skype and more.</i>
- <i>QuickCasts: Monthly live instructor led training online, 30-minutes in length, six sessions per day</i>
- <i>Dedicated Client Success Manager to trouble-shoot adoption concerns, customize FAQs, customize Course lists, and more</i>
- <i>Library of LaunchTips: HTML-based email templates, highlighting video-training content specific to your users’ new desktop image</i>
- <i>Closed captioning and localization services (provided via Bing Translate) in 44 languages, including but not limited to: Spanish, French, Chinese, Portuguese, German</i>

- *Tip-of-the-Month Emails: HTML-based email templates, highlighting video-training content specific to users' most impactful productivity features*

## Building a quickhelp™ ROI

There are 4 key areas in which the team will drive an ROI for Department. They are:

### **Reducing Help Desk Calls**

City of Doral's Support team will be provided with the following to help them reduce help desk calls:

- The City of Doral support team will be trained on how to "share" trackable QuickHelp video links that they can answer support tickets, update knowledgebase articles, and email as reference materials for your users.
- The City of Doral support team may be assigned video content on Office 365 and OneDrive to get them up to speed.
- Prepared communication tools such as FAQs and Monthly Tips to proactively send out to end users

### **Microsoft Product Adoption and Utilization**

A BrainStorm Client Success Manager (CSM) will be assigned to work with City of Doral's project team to create a set of content that can be assigned to any, or all users. These resources may be focused on any focus area that you desire such as Skype for Business, OneDrive, or any other Microsoft desktop tool. Management reports are provided to see who has completed the training.

### **New Hires (Retention and Onboarding/Speed)**

As organizations rollout Office 365 a group that is occasionally overlooked is the new hires that will join the company after the rollout is complete. How do you ensure that these new employees are up to speed with the critical features that you want all of your people know and use? QuickHelp gives you the ability to assign content to these new hires in order to make sure they are up to speed as quickly as possible.

### **On going Productivity**

QuickHelp resources (videos) are continually being updated and produced for new product introductions like Windows 10. Because of this, you can be assured that the resources will be ready for you whenever you decide to add an additional set of functionality to your user offerings. This includes the video content, the communication plan, the help desk training and the end user accountability. Everything will be ready for your use when you are ready to move forward.

## Support

ISC's approach to support for transitioning the Customer's enterprise messaging system will be via a dedicated 24 x 7 support team. This team offers access to ISC subject matter experts (SMEs) and assistance to help minimize downtime and improve the knowledge transfer to Customer support staff. This approach

has proven very successful in minimizing risk and maximizing utilization of available resources to ensure success of the project.

The ISC Team understands that receiving timely technical support from qualified professionals is a key aspect of cloud services. Equally important is the critical role that the Customer's IT department plays in the support of its users, desktops, workstations and mobile devices. ISC will work with Customer to provide best practices and current Microsoft standards for preparing the platforms to work successfully with O365. This knowledge transfer will assist Customer in preparing their end-user platforms (desktops and mobile devices) for functioning with the new environment.

Customer IT support staff will perform post migration Tier I level support for end users and helpdesk calls. The ISC Team will perform post migration Tier II support for Customer support staff.

### Work Products and Deliverables

Service deliverables shall be deemed to have been accepted unless Customer provides a timely, written rejection notice, as previously described. Customer use or partial use of a service deliverable, or Customer's decision to proceed to a subsequent phase of work, will constitute acceptance of that service deliverable.

ISC will review and, if agreed upon, correct problems within a service deliverable that are identified in the written rejection notice, as previously described, and within the scope of the project, after which the service deliverable will be deemed to have been accepted. Problems that are outside the scope of the project and feedback that is provided after a service deliverable has been deemed to have been accepted will be addressed as potential changes of scope pursuant to the change management process that is outlined in this SOW.

# Project Approach

ISC will work with the Customer to execute its part of the project in five distinct phases presenting a structured approach: Discovery, Remediate and Enable, Plan, Prepare and Test and Migration. This approach provides the Customer with a deployment strategy with defined entrance and exit criteria and deliverables, and presents high-level timeframes that control the pace of the deployment while keeping individual tasks serialized. It is common for tasks in different steps to occur simultaneously and/or overlap. Between some steps, a formal checkpoint is conducted to validate that the project is ready to proceed to the next phase.

## Discovery Phase

During the Discovery Phase ISC will work closely with the Customer to ensure alignment between the project technical requirements and goals. Successful O365 implementations are based on three major dependencies:

1. Discovery tools can be run in the Customer's environment.
2. Customer will fulfill all requirements for hardware, software, and clients in a timely and high-priority manner.
3. Customer will actively participate in the process and provide the appropriate information and staff assistance in a timely manner.

Discovery Phase activities begin with Project Initiation, including a Kick-off meeting and scheduling Discovery sessions. The project-kick off meeting should include the entire project team and customer Executive Sponsors to review the project scope, deliverables, and project schedule. Discovery will jointly confirm the current hosted email system, the estimated number of user mailboxes to be migrated, and identify key stakeholders. ISC will also recommend and assist with any Messaging Analysis Tools needed to gather additional information which might be needed.

A primary activity during Discovery is the joint review of the proposed project timeline and anticipated timeframes. This review will also determine information and other resources needed to complete a Final Project Plan.

ISC will provide a Migration List template at the beginning of the project. The list is key to making a migration successful with minimal issues for the users. We will instruct you on how to handle Shared Mailboxes, Public Folders, Delegates, VIPs, and Mobile Devices. The migration schedule will be jointly reviewed, revised, and finalized to ensure communications can be sent out well in advance to all users.

Within two days of the kick-off meeting, ISC will conduct Detail Discovery workshop(s) with subject matter experts (SMEs). The workshops will cover areas such as Network Planning, Architectural Review, Exchange Planning, Desktop Rollout, High-Level Readiness Planning, and Archive considerations. After

the Detail Discovery is complete, ISC will document and review all findings with the project team. The Discovery documentation will clearly identify the requirements and activities necessary to get the Customer ready for migration, and will be used to guide the Remediate and Enable phase.

During this phase, the Microsoft Tenant will be procured to establish the portal and domain for migration purposes. Findings from the discovery activities shown in TABLE 1 are used to identify the remediation or enablement tasks necessary for O365 deployment. The Discovery Phase activities are shown in TABLE 1.

TABLE 1: DISCOVERY PHASE ACTIVITIES

<b><i>Actions/Activities</i></b>	<b><i>Owner</i></b>
<ul style="list-style-type: none"> <li>• Schedule and conduct joint Project Initiation Kick-Off Meeting including:               <ul style="list-style-type: none"> <li>– Project Scope, Draft High Level Project Schedule, resources and assignments, Introduction of the project team</li> </ul> </li> <li>• Schedule and conduct Discovery Workshops with Customer SMEs including the following areas:               <ul style="list-style-type: none"> <li>– High-level Readiness planning</li> <li>– Exchange planning</li> </ul> </li> <li>• Provide Discovery and Messaging Analysis tools</li> <li>• Provide customer with AD Collection script</li> <li>• Based on readiness determined by initial and detail discovery and Customer's identified capacity needs:               <ul style="list-style-type: none"> <li>– Document readiness assessment output and workshop findings in Detailed Discovery document, and define the required remediation and enablement tasks</li> <li>– Verify Office 365 Tenant</li> </ul> </li> </ul>	ISC
<ul style="list-style-type: none"> <li>• Coordinate scheduling and participation in joint Project Initiation kick-off meeting</li> <li>• Coordinate scheduling and SME participation in all technical planning and discovery meetings</li> <li>• Make staff and infrastructure access available to complete the necessary discovery activities</li> <li>• Participate in discovery interviews and provide requested information to create the Remediation Checklist</li> <li>• Document planning and action plans resulting from discovery workshops</li> <li>• Run Discovery and Messaging Analysis tools</li> <li>• Provide remote access to messaging analysis workstations</li> <li>• Review and agree on initial High Level Migration Plan and timeline</li> <li>• Verify Office 365 Tenant</li> </ul> <p><b>Assumptions:</b></p> <ul style="list-style-type: none"> <li>• Discovery tools can be run in the Customers environment</li> <li>• Customer will actively participate in the discovery process and provide the appropriate information in a timely manner</li> </ul>	City of Doral
<b>Exit Criteria:</b>	ISC/City of Doral

<b>Actions/Activities</b>	<b>Owner</b>
<ul style="list-style-type: none"> <li>Discovery of the current technical environment is complete and the findings have been documented in the Detailed Discovery findings, including an updated Project Schedule reflecting new required remediation and enablement tasks found during Discovery.</li> </ul>	

### Remediate and Enable Phase

This is the phase in which the Customer completes the remediation and enablement tasks defined during the Discovery phase. This includes the purchase and/or allocation of any hardware, software, or licenses. Some of these activities may be worked in parallel with the Discovery and Plan phases. The Remediate and Enable Phase activities are shown in TABLE 2.

TABLE 2: REMEDIATE & ENABLE ACTIVITIES

<b>Actions/Activities</b>	<b>Owner</b>
<ul style="list-style-type: none"> <li>Provide technical answers to questions that arise during remediation and enablement</li> <li>Setup and Configure third party migration engines</li> <li>Run tools such as IDFix to locate objects that may have issues during WAADS</li> <li>Verify completed remediation activities</li> </ul>	ISC
<ul style="list-style-type: none"> <li>Use the Discovery Findings document and Remediation Checklist to assign and execute remediation and enablement tasks</li> <li>Complete remediation and enablement planning for the following and execute the plan, including: <ul style="list-style-type: none"> <li>Mail-enabled applications</li> <li>Network bandwidth impact estimate</li> <li>User Identity and Account Provisioning</li> <li>Develop Service Desk Readiness Plan and begin execution</li> </ul> </li> <li>Acquire/allocate recommended hardware/virtual machine(s) as needed with servers configured, operating systems and patches installed, and available on the network</li> <li>Ensure Exchange server is available and ready for hybrid server capability</li> <li>Run AD Collection script and return to ISC</li> </ul>	City of Doral
<p><b>Exit Criteria:</b></p> <ul style="list-style-type: none"> <li>Completion of all remediation and enablement tasks and mutually agreed upon implementation design</li> <li>Validation of all remediation and enablement tasks being complete</li> </ul>	ISC/City of Doral

### Plan Phase

During the Plan phase, the ISC and the Customer teams work together to align the project's technical requirements, goals, critical success factors, and constraints. The pilot migration(s) and velocity



migration(s) will be further planned and agreed upon, with iterations of and refinements to the Migration List as needed. ISC will also provide technical answers to questions that arise during remediation and enablement. ISC will ensure all remediation and enablement activities are in process or have been implemented for mail-enabled applications, network bandwidth, user identity, and account provisioning. The Plan phase activities are shown in TABLE 3.

TABLE 3: PLAN ACTIVITIES

<b><i>Actions/Activities</i></b>	<b><i>Owner</i></b>
<ul style="list-style-type: none"> <li>• Schedule and conduct joint Migration Deployment Planning Meeting to include:               <ul style="list-style-type: none"> <li>• Review project goals, assumptions, constraints, limitations, dependencies</li> <li>• Project schedule modified and verified</li> <li>• Review configuration of O365 Tenant</li> <li>• Validation required domains</li> <li>• Auto discovery configuration</li> <li>• Verify client desktop upgrades/patches have been met</li> <li>• Verify remediation activities are complete</li> <li>• Provide communication templates for the customers to modify as appropriate for communicating with their users.</li> <li>• Knowledge Transfer with the Project Team requirements for the customer migration list.</li> </ul> </li> </ul>	ISC
<ul style="list-style-type: none"> <li>• Schedule and participate in Deployment Planning Meeting</li> <li>• Assume ownership of overall migration deployment, including “out-of-scope” activities and project schedule</li> <li>• Verify Exchange Online licenses/purchase appropriate licensing</li> <li>• Identify pilot group</li> <li>• Develop Communication Plans (strategy and materials) for end users, executives, and support desk, and begin execution</li> <li>• Complete remediation and enablement activities</li> </ul>	City of Doral
<p><b>Assumptions:</b></p> <ul style="list-style-type: none"> <li>• Customer has assigned a Project Manager for the deployment</li> <li>• Customer has an executive sponsor for this effort</li> <li>• Customer has ownership of domains to be managed in O365</li> <li>• Email client is primarily Outlook365</li> </ul>	
<p><b>Exit Criteria:</b></p> <ul style="list-style-type: none"> <li>• Planning activities for deployment are complete</li> <li>• Review of the following:               <ul style="list-style-type: none"> <li>○ Design documents</li> <li>○ Project Schedule</li> <li>○ Draft Migration List</li> <li>○ Recommended Communication Samples</li> </ul> </li> </ul>	ISC/City of Doral

## Prepare and Test Phase

In the Prepare and Test phase, the emphasis shifts to enable the infrastructure for production use of O365. The process begins with provisioning the Customers O365 Tenant and validating the domain names that will be used for receiving and sending email, configuring DNS with the necessary records to support auto discovery and messaging system domain identification, and provisioning of an administration account for ISC Support Team to configure O365 in an auditable way. ISC, in conjunction with the Customer, will install and configure/verify WAADS to provision the Active Directory (AD) users in the cloud prior to migration of corresponding mailboxes. This Microsoft service will push any changes to Customer’s AD objects to the corresponding cloud account.

ISC will verify WAADS are working correctly and are ready for migration. Utilizing Customer supplied test mailboxes, ISC will thoroughly test moving mailboxes prior to active mailbox migration. The ISC Team will also need access to a standard Customer desktop image to perform client end user testing to verify the user experience.

ISC will activate test users in the O365 Online Service Portal. Prepare and test activities are shown in TABLE 4.

TABLE 4: PREPARE AND TEST ACTIVITIES

<b><i>Actions/Activities</i></b>	<b><i>Owner</i></b>
<p><b>Windows Azure Active Directory Service Analysis</b></p> <ul style="list-style-type: none"> <li>• Provide guidance and assistance for AD Directory remediation, including assistance with AD sync and Directory Object Preparation</li> <li>• Provide customer AD Cleanup list including the following: <ul style="list-style-type: none"> <li>• Duplicate Proxy Addresses and User Principal Names</li> <li>• Blank and invalid User Principal Names</li> <li>• Removing invalid characters in the Given name, Surname, DisplayName, SamAccountName, ProxyAddresses, and UserPrincipalName attributes</li> <li>• Sync Customer Directory to O365 directory</li> </ul> </li> </ul> <p><b>Validation and Verification Testing</b></p> <ul style="list-style-type: none"> <li>• Conduct Dry Run testing on Customer production O365, using test accounts</li> <li>• Test O365 AD identity process</li> <li>• Verify mailbox moves to O365</li> </ul>	ISC
<p><b>General</b></p> <ul style="list-style-type: none"> <li>• Complete readiness activities:</li> <li>• Implementation of all remediation and enablement tasks</li> <li>• Desktop setup and Customer update packages for targeted users</li> <li>• Communications, service desk, user, and administrator training</li> <li>• Provide complete migration lists and data for migration</li> <li>• Complete all technical readiness</li> </ul>	City of Doral

<ul style="list-style-type: none"> <li>• Purchase appropriate number and type of licenses</li> </ul> <p><b>Windows Azure Active Directory Service Analysis</b></p> <ul style="list-style-type: none"> <li>• Perform AD tasks, including:</li> <li>• Complete AD design, installation, and configuration</li> <li>• Cleanup of AD Cleanup List:</li> <li>• Attribute changes in AD to allow for filtering of objects with WAADS</li> </ul> <p><b>Validation and Verification Testing</b></p> <ul style="list-style-type: none"> <li>• Construction and maintenance of test environments and accounts</li> <li>• Assist as needed to confirm base features and functionality of applicable O365 services are working properly</li> </ul>	
<p><b>Exit Criteria:</b></p> <ul style="list-style-type: none"> <li>• Planning activities for deployment are complete and documented within the QA Test results</li> <li>• Design/Build documents complete</li> </ul>	

### Validation Testing

Validation testing for mailbox readiness for O365 involves a variety of collaborative efforts to verify platform readiness, feature availability, and service operating as planned. All validation and testing services are against the Customer’s production environment only, using test accounts. The construction and maintenance of any test environments is the responsibility of the Customer. The validation and verification test types are described in TABLE 5.

TABLE 5: VALIDATION TEST TYPES

<b>Test Type</b>	<b>Description</b>
Directory Ready	Azure Active Directory Connect is properly synchronizing AD objects to the Office 365 tenant.
Service Validation	Test accounts are used to validate that in-scope features and functionality are performing properly in the Office 365 production environment. Must be completed prior to account provisioning.
Email Coexistence	The Department server is properly configured with Exchange hybrid server and operating properly.
Pilot Migration	Perform pilot migration to verify the technical migration process is operating properly and to test end-user communications, help desk, and support processes. Repeat if necessary with a slightly larger group of pilot users.
Migration Validation	Users validate features and functions and report any missing in-scope functionality and/or in-scope data within 48 hours of the cutover migration.

### Migrate Phase

Email migration is the process of moving your existing mailbox content to O365 and Exchange Online. Mailboxes that have migrated to the cloud will not be able to perform sharing or availability functions with mailboxes still on-premises; however, e-mail and calendaring requests will work as they do today between the Customer and other entities running Exchange. To this end, the Customer’s migration will

need to occur as quickly as the organization can accomplish. The goal of the migration process is to have a unified migration experience for end users with minimal impact to their daily routines.

The email migration is driven from a spreadsheet that ISC refers to as the “Migration List.” This document is vital to the development of the migration schedule and scripts used to perform the migrations. The Migration List will need to be locked-down prior to the start of pilot migrations. Once the list is locked-down changes to the Migration List may impact migration deadlines.

Once the project managers and sponsors agree, ISC will move forward with an active mailbox cutover migration. The Migration will be executed at a sustainable velocity consistent with the migration target and the migration schedule. Migration and the post-migration support conclude with the project closeout activities and meeting. Migrate phase activities are shown in TABLE 6.

TABLE 6: MIGRATION ACTIVITIES

<b>Actions/Activities</b>	<b>Owner</b>
<ul style="list-style-type: none"> <li>• Provision users in the O365 tenant based on the Migration List approved by the Customer</li> <li>• Execute shared mailbox migration based on list provided Customer</li> <li>• Execute cutover migration</li> <li>• Provide support during migration</li> <li>• Provide Tier 3 support to help desk via bridge line</li> <li>• Provide post-migration support hours as defined herein</li> <li>• Conduct project closeout meeting, including transition to Microsoft support as appropriate</li> </ul>	ISC
<p><b>Pilot Migration</b></p> <ul style="list-style-type: none"> <li>• Assist with pilot migrations</li> <li>• Test/Validate help desk and support, issues escalation and resolution</li> <li>• Assist users with feature/function validation</li> </ul> <p><b>Cutover Migration</b></p> <ul style="list-style-type: none"> <li>• Execute communication plans to inform end users about the transition to O365, including migration schedule</li> <li>• Update Migration List and schedule and provide to ISC</li> <li>• Perform Tier 1 and Tier 2 support</li> <li>• Schedule staff to assist in managing migration activities (evening/weekend)</li> <li>• Schedule and assist individual users with validation testing for their migrated mailbox</li> </ul>	City of Doral
<p><b>OneDrive for Business</b></p> <p><b>Scope</b></p> <ul style="list-style-type: none"> <li>• Enabling SharePoint/OneDrive user licenses</li> <li>• Basic configuration of OneDrive settings available in the Admin portal or PowerShell such as whitelist domains, conditional access etc.</li> </ul> <p><b>Assumptions</b></p>	ISC

- Users will need to have the OneDrive Sync client to synchronize with their computers, and this is part of the ProPlus 2016 deployment.
- The features used will be:
  - My Site document libraries
  - SharePoint Site document libraries
  - Permissions will be based upon built-in SharePoint Groups.

**Out of Scope**

- Migration of existing files to OneDrive
- Deployment of the OneDrive sync client
- Creating sync requests on user workstations

## Public Folders

### Option 1: Office 365 Public Folder Redirection

Exchange 2010/2013 hybrid services allows for utilization of Public Folder redirection in use with Office 365. This allows for all Public Folder (PF) data to remain in its current on-premise Exchange environment and the Outlook clients only access the data in that location. This provides time for analysis of current PF related business processes and determination of the appropriate solution for each PF use case to migrate to like SharePoint, OneDrive etc.

Exchange 2013 has a technical limitation that requires decommissioning of all Exchange 2003 Servers before Exchange 2013 can be installed. With Exchange 2010 Hybrid servers the public folder cannot reside only on Exchange 2003 servers.

**Pros:**

- This option keeps any sensitive PF data on-premise until a better solution can be provided.
- Microsoft support life cycle has ended for Exchange 2003 this option allows for a supported solution.
- Provides more options for the analysis of appropriate migration paths.

**Cons:**

- Additional time for decommissioning Exchange 2003.
- Does not support OWA clients in Office 365

### Option II: Exchange Public Folder One-way cutover

In this option, for the mail migration, Exchange hybrid server would be utilized to migrate public folder content utilizing the Microsoft PF PowerShell scripts to copy PF data to Office 365. This option is a onetime, one way (on-premise to cloud) copy of all PF data to Office 365. This method impacts end user's ability to access PF data once their mailbox is migrated to Office 365. Once all Mailboxes are migrated to Office 365, PF access would be "cut over" from on-premise to Office 365, at which time all migrated user mailboxes would have access to cloud based PF data including OWA.

**Pros:**

- Ability to move PF data to Office 365 to free up on-premise resource
- Ability to avoid migration of specific folders if needed.
- The PF data can be moved at the same time as the users that utilize it as long as the number of users is limited.

**Cons:**

- Limited to 50GB per folder, 2GB per item.
- Interruption of business work flow that utilize PFs that have inbox rules.
- Some permissions and corrupted content will not be migrated.

Limitations of Office 365 Public Folders

- Only Outlook 2007, Outlook 2010 and Outlook 2013 can access Cloud-based PFs;
- There is no mailbox audit logging against PF mailboxes now;
- If the master hierarchy PF mailbox becomes unavailable, users can view but not write to PFs;
- It is not possible to change which PF mailbox is the master hierarchy mailbox;
- When you migrate PFs, PF rules are migrated along with the data and are kept as PF rules. They are not converted to mailbox rules.
- The icons for public folders that contain contacts or calendars default back to the generic icon.

Limits of Exchange online Public folders

[https://technet.microsoft.com/en-us/library/dn594582\(v=exchg.160\).aspx](https://technet.microsoft.com/en-us/library/dn594582(v=exchg.160).aspx)

Option III: Third-party Software Solution (Additional Cost)

Like option 2, this option utilizes Exchange hybrid servers, which can coexist with legacy Exchange servers. In this option, there is no requirement to upgrade Exchange 2003 servers and the public folder data would stay in its current location. A third-party software solution would be used to bidirectionally replicate PF data between the on-premise Exchange system and Office 365. This would be implemented before any mailbox migrations, providing PF access to users, both on premise and in the cloud, regardless of what Outlook or OWA client they use. These software solutions typically provide the ability to selectively replicate PF data to Office 365. The software synchronizes changes to selected PFs between Office 365 and on-premise and vice versa on a scheduled basis.

Items to consider:

- Additional licensing cost of the 3<sup>rd</sup> party tool.
- Time constraint of procurement of third-party software solution.
- Time constrained PF data analysis and remediation to fit in time frame of project

# Proposed Project Timeline

The services described in this SOW are outlined in the draft Project Plan below. The timeline is subject to change, as final schedules will be adjusted during the Discovery and Plan phase and is relative to the project start date. All dates and durations provided are estimates only. Staff assignment and scheduling, hardware procurement, and other key activities are dependent on the project start date, so it should be as accurate as possible. Additional fees may apply if the project is delayed because of the Customer's action, such as Customer requests a temporary suspension in project activities or chooses to terminate the project early.

Task Name	Start	Finish
<b>City of Doral Draft Project Schedule</b>	<b>Mon 7/3/17</b>	<b>Mon 8/7/17</b>
<b>Scope -Office 365 Velocity Migration and Support</b>	<b>Mon 7/3/17</b>	<b>Wed 7/5/17</b>
<b>Active Email Migration</b>	<b>Mon 7/3/17</b>	<b>Wed 7/5/17</b>
<b>Office 365 Transition project schedule</b>	<b>Mon 7/3/17</b>	<b>Wed 7/5/17</b>
<b>SCOPE</b>	<b>Mon 7/3/17</b>	<b>Tue 7/4/17</b>
Scope Defined	Mon 7/3/17	Mon 7/3/17
SOW Signed and approved	Tue 7/4/17	Tue 7/4/17
<b>Office 365 Pre-Tasks</b>	<b>Wed 7/5/17</b>	<b>Wed 7/5/17</b>
Project Org created	Wed 7/5/17	Wed 7/5/17
Set up Kickoff Meeting/Confirm resource allocations	Wed 7/5/17	Wed 7/5/17
Scope and Preliminary Tasks complete	Wed 7/5/17	Wed 7/5/17
<b>DISCOVERY PHASE</b>	<b>Wed 7/5/17</b>	<b>Mon 7/10/17</b>
<b>Project Kickoff</b>	<b>Wed 7/5/17</b>	<b>Wed 7/5/17</b>
<b>Hold Customer Kickoff Meeting</b>	<b>Wed 7/5/17</b>	<b>Wed 7/5/17</b>
Review Project Scope, Schedule and Expectations	Wed 7/5/17	Wed 7/5/17
Review dedicated deployment project management team	Wed 7/5/17	Wed 7/5/17
Review of work streams, milestone activities, and timelines	Wed 7/5/17	Wed 7/5/17
Commitment from all work stream owners on milestone dates	Wed 7/5/17	Wed 7/5/17
<b>Conduct Detailed Discovery</b>	<b>Wed 7/5/17</b>	<b>Mon 7/10/17</b>
<b>Run Tools and Populate the Questionnaire</b>	<b>Wed 7/5/17</b>	<b>Thu 7/6/17</b>
Identify mailbox size and item counts	Wed 7/5/17	Thu 7/6/17
AD Export for Migration Template	Thu 7/6/17	Thu 7/6/17
<b>Gather Information</b>	<b>Thu 7/6/17</b>	<b>Thu 7/6/17</b>
Project Team Contact List complete and distributed	Thu 7/6/17	Thu 7/6/17
<b>Discovery Workshops</b>	<b>Thu 7/6/17</b>	<b>Thu 7/6/17</b>
Discovery Workshops complete	Thu 7/6/17	Thu 7/6/17
<b>Project Schedule Development</b>	<b>Thu 7/6/17</b>	<b>Fri 7/7/17</b>
Develop Project Schedule based on Discovery Workshop findings	Thu 7/6/17	Fri 7/7/17

	Develop migration strategy	Fri 7/7/17	Fri 7/7/17
	Determine High Level migration schedule approach	Fri 7/7/17	Fri 7/7/17
	<b>Discovery Output Meeting with customer</b>	<b>Fri 7/7/17</b>	<b>Fri 7/7/17</b>
	Finalize Questionnaire with customer	Fri 7/7/17	Fri 7/7/17
Plan	Consolidate Decisions, Design and Remediation and Enablement	Fri 7/7/17	Fri 7/7/17
	Review Project Schedule	Fri 7/7/17	Fri 7/7/17
	Hardware/VM Recommendations presented	Fri 7/7/17	Fri 7/7/17
Sponsor	Discovery Workshop and Project Schedules approved by Project	Fri 7/7/17	Mon 7/10/17
	<b>MILESTONE: Discovery Phase complete</b>	<b>Mon 7/10/17</b>	<b>Mon 7/10/17</b>
	<b>REMEDIATE &amp; ENABLE PHASE</b>	<b>Mon 7/10/17</b>	<b>Thu 7/20/17</b>
	<b>On premises hardware and applications</b>	<b>Mon 7/10/17</b>	<b>Fri 7/14/17</b>
	<b>On Premises Hardware and Infrastructure</b>	<b>Mon 7/10/17</b>	<b>Fri 7/14/17</b>
	<b>Hardware Build out complete</b>	<b>Mon 7/10/17</b>	<b>Fri 7/14/17</b>
	Hardware buildout - OS Installed and configured	Mon 7/10/17	Tue 7/11/17
	Setup and Configure Priasoft Migration Software	Tue 7/11/17	Wed 7/12/17
	WAADS Installed and Configured	Wed 7/12/17	Fri 7/14/17
	<b>Network</b>	<b>Fri 7/14/17</b>	<b>Thu 7/20/17</b>
	Networking and Load Balancing Ready	Fri 7/14/17	Mon 7/17/17
	NAT issues resolved	Mon 7/17/17	Tue 7/18/17
	Proxy/Firewall issues resolved	Tue 7/18/17	Wed 7/19/17
	<b>Client Operating Systems and Client Applications</b>	<b>Wed 7/19/17</b>	<b>Thu 7/20/17</b>
	Operating System and Application Upgrades and deployments	Wed 7/19/17	Wed 7/19/17
	Application Remediation	Wed 7/19/17	Thu 7/20/17
	<b>User Identity and Account Provisioning</b>	<b>Wed 7/19/17</b>	<b>Wed 7/19/17</b>
	Account Provisioning Updates Complete	Wed 7/19/17	Wed 7/19/17
	Customer Ready	Wed 7/19/17	Wed 7/19/17
	<b>MILESTONE: Remediate &amp; Enable Phase complete</b>	<b>Fri 7/14/17</b>	<b>Fri 7/14/17</b>
	<b>PLAN PHASE</b>	<b>Mon 11/14/16</b>	<b>Wed 7/19/17</b>
	<b>Establish Project Governance</b>	<b>Mon 7/10/17</b>	<b>Tue 7/11/17</b>
	<b>Stakeholder Management</b>	<b>Mon 7/10/17</b>	<b>Tue 7/11/17</b>
	Establish relationship with sponsor and key stakeholders	Mon 7/10/17	Tue 7/11/17
	Stakeholder Management Plan Complete	Mon 7/10/17	Tue 7/11/17
	<b>Communication Management</b>	<b>Mon 7/10/17</b>	<b>Tue 7/11/17</b>
	Review Communications Plan with customer	Mon 7/10/17	Tue 7/11/17
	<b>Change Management</b>	<b>Mon 7/10/17</b>	<b>Tue 7/11/17</b>
	Establish customer-facing Change Request list	Mon 7/10/17	Tue 7/11/17
	Review change request process with customer	Mon 7/10/17	Tue 7/11/17
	<b>Issue Management</b>	<b>Mon 7/10/17</b>	<b>Tue 7/11/17</b>
	Establish customer-facing Issue-Action-Decisions Req'd List	Mon 7/10/17	Tue 7/11/17
	Review Issue Management Plan with customer	Mon 7/10/17	Tue 7/11/17
	<b>Risk Management</b>	<b>Mon 7/10/17</b>	<b>Tue 7/11/17</b>
	Initial Risk List (internal view) complete	Mon 7/10/17	Tue 7/11/17
	Risk Management Plan review with customer complete	Tue 7/11/17	Tue 7/11/17
	Conduct Risk Assessment with customer	Tue 7/11/17	Tue 7/11/17



Initial Risk List (internal view and external view) complete	Tue 7/11/17	Tue 7/11/17
<b>Service Desk Planning Workshop</b>	<b>Tue 7/11/17</b>	<b>Tue 7/11/17</b>
Review current structure of help desk(s)	Tue 7/11/17	Tue 7/11/17
Review requirements for help desk training	Tue 7/11/17	Tue 7/11/17
Document decisions, plan of action and TimeLine	Tue 7/11/17	Tue 7/11/17
<b>Communication Strategy Workshop</b>	<b>Tue 7/11/17</b>	<b>Tue 7/11/17</b>
Review service support structure and processes	Tue 7/11/17	Tue 7/11/17
Document decisions, plan of action and TimeLine	Tue 7/11/17	Tue 7/11/17
Draft communications plan, materials and schedule	Tue 7/11/17	Tue 7/11/17
<b>Scheduling</b>	<b>Tue 7/11/17</b>	<b>Tue 7/11/17</b>
Determine High Level Migration Schedule Approach	Tue 7/11/17	Tue 7/11/17
Refine Schedule for Prepare and Migrate Phases	Tue 7/11/17	Tue 7/11/17
Adjust Prepare/Migrate schedule phases using planning documentation	Tue 7/11/17	Tue 7/11/17
Conduct schedule review with team	Tue 7/11/17	Tue 7/11/17
<b>Project Readiness</b>	<b>Mon 7/11/17</b>	<b>Wed 7/19/17</b>
Plan for mail-enabled applications	Tue 7/11/17	Tue 7/11/17
Identify options for user identity and account provisioning	Tue 7/11/17	Wed 7/12/17
Identify email coexistence strategy (if needed)	Wed 7/12/17	Wed 7/12/17
Identify current network links, user concentration, and current utilization	Wed 7/12/17	Wed 7/12/17
Identify on-premises infrastructure server requirements	Mon 7/17/17	Mon 7/17/17
Identify the operating systems and client applications	Mon 7/17/17	Tue 7/18/17
Identify the mobile platform that your organization will use	Tue 7/18/17	Tue 7/18/17
Develop an end user and admin training schedule	Tue 7/18/17	Tue 7/18/17
Develop end-user communications strategy	Tue 7/18/17	Tue 7/18/17
Technical Readiness	Tue 7/18/17	Wed 7/19/17
<b>Customer Environment Discovery</b>	<b>Wed 7/19/17</b>	<b>Wed 7/19/17</b>
Review Office 365 Deployment Readiness	Wed 7/19/17	Wed 7/19/17
<b>On Boarding/Off Boarding Consulting</b>	<b>Tue 7/18/17</b>	<b>Wed 7/19/17</b>
LDAP	Tue 7/18/17	Tue 7/18/17
AD	Tue 7/18/17	Tue 7/18/17
Email	Tue 7/18/17	Wed 7/19/17
<b>Network Readiness Workshop</b>	<b>Wed 7/19/17</b>	<b>Wed 7/19/17</b>
Domain Redlegation	Wed 7/19/17	Wed 7/19/17
External DNS Records	Wed 7/19/17	Wed 7/19/17
Third-Party SSL Certificates	Wed 7/19/17	Wed 7/19/17
Ports and Protocols	Wed 7/19/17	Wed 7/19/17
Firewall Considerations	Wed 7/19/17	Wed 7/19/17
WAN Accelerators	Wed 7/19/17	Wed 7/19/17
Hardware and Software Load Balancing	Wed 7/19/17	Wed 7/19/17
Internet Bandwidth	Wed 7/19/17	Wed 7/19/17
TCP Port Availability	Wed 7/19/17	Wed 7/19/17
Network Configuration and Bandwidth document timelines	Wed 7/19/17	Wed 7/19/17
<b>User Identity and Account Provisioning Workshop</b>	<b>Wed 7/19/17</b>	<b>Wed 7/19/17</b>
Review Options to provision users	Wed 7/19/17	Wed 7/19/17

Review user license activation	Wed 7/19/17	Wed 7/19/17
<b>Develop Customer Migration Plan</b>	<b>Wed 7/19/17</b>	<b>Wed 7/19/17</b>
Create Migration Plan (identify user groups)	Wed 7/19/17	Wed 7/19/17
<b>Develop Migration Schedule</b>	<b>Wed 7/19/17</b>	<b>Wed 7/19/17</b>
Create Draft Customer Migration Schedule	Wed 7/19/17	Wed 7/19/17
Review / Finalize / APPROVE Customer Migration Schedule	Wed 7/19/17	Wed 7/19/17
<b>Planning Output</b>	<b>Wed 7/19/17</b>	<b>Wed 7/19/17</b>
Documentation Review	Wed 7/19/17	Wed 7/19/17
Documentation Complete	Wed 7/19/17	Wed 7/19/17
<b>MILESTONE: Plan Phase Complete</b>	<b>Mon 11/14/16</b>	<b>Mon 11/14/16</b>
<b>PREPARE &amp; TEST Phase</b>	<b>Wed 7/19/17</b>	<b>Tue 8/1/17</b>
<b>Remediation and Enablement Verification</b>	<b>Wed 7/19/17</b>	<b>Tue 8/1/17</b>
<b>Review the Service Desk Plan</b>	<b>Wed 7/19/17</b>	<b>Thu 7/20/17</b>
Review the User and Administrator Training Plan	Wed 7/19/17	Wed 7/19/17
Review the Communications Plan	Wed 7/19/17	Thu 7/20/17
Review the Infrastructure and Hardware	Thu 7/20/17	Thu 7/20/17
Review Messaging Onboarding Plan	Thu 7/20/17	Thu 7/20/17
Review the Network and Bandwidth Onboarding	Thu 7/20/17	Thu 7/20/17
Review the User Experience Plan	Thu 7/20/17	Thu 7/20/17
Review the User Identity and Account Provisioning Plan	Thu 7/20/17	Thu 7/20/17
<b>Admin Training</b>	<b>Thu 7/20/17</b>	<b>Thu 7/20/17</b>
Helpdesk and Desktop Support Overview on Troubleshooting issues (for day after migrations)	Thu 7/20/17	Thu 7/20/17
Admin Training for Office 365 Portal (FOPE, Exchange Admin, User Menus)	Thu 7/20/17	Thu 7/20/17
<b>Tenant Enablement</b>	<b>Thu 7/20/17</b>	<b>Fri 7/21/17</b>
<b>Customer Initiation</b>	<b>Thu 7/20/17</b>	<b>Fri 7/21/17</b>
<b>Customer Tenant and Pilot User Licenses Activation</b>	<b>Thu 7/20/17</b>	<b>Fri 7/21/17</b>
Activate Tenant and create Pilot user licenses	Thu 7/20/17	Fri 7/21/17
Implement Password Policies for non-federated identities	Fri 7/21/17	Fri 7/21/17
<b>Infrastructure Preparation and Service Configurations</b>	<b>Fri 7/21/17</b>	<b>Mon 7/24/17</b>
<b>Network Configuration and Bandwidth Updates Preparation</b>	<b>Fri 7/21/17</b>	<b>Mon 7/24/17</b>
Add domain and verify ownership	Fri 7/21/17	Mon 7/24/17
Change DNS records at domain registrar	Mon 7/24/17	Mon 7/24/17
Create auto discover and sender policy framework records	Mon 7/24/17	Mon 7/24/17
Create external auto discover record	Mon 7/24/17	Mon 7/24/17
Create internal auto discover record	Mon 7/24/17	Mon 7/24/17
DNS Changes Complete	Mon 7/24/17	Mon 7/24/17
<b>Security Planning</b>	<b>Mon 7/24/17</b>	<b>Tue 7/25/17</b>
Discussion on DLP/Encryption	Mon 7/24/17	Tue 7/25/17
Tenant Review of Encryption	Tue 7/25/17	Tue 7/25/17
Document new encryption process	Tue 7/25/17	Tue 7/25/17
<b>Prissoft Dry Run And Testing</b>	<b>Tue 7/25/17</b>	<b>Mon 7/31/17</b>
Email Migration Dry Run	Tue 7/25/17	Mon 7/31/17
<b>Service Ready</b>	<b>Mon 7/31/17</b>	<b>Tue 8/1/17</b>
Migration groups defined; migration schedule developed	Mon 7/31/17	Mon 7/31/17

Service configurations completed	Mon 7/31/17	Mon 7/31/17
Desktop Rollout complete for O365 Clients (including mobile devices) for all users to be migrated comply with Office 365 requirements	Mon 7/31/17	Mon 7/31/17
Base features and functionality of selected Office 365 services are working properly (service validation)	Mon 7/31/17	Tue 8/1/17
Network is prepared to sustain the load of activities including: migration traffic, mail routing in the coexistence period, and client traffic	Tue 8/1/17	Tue 8/1/17
Service Provisioning Sign Off Document	Tue 8/1/17	Tue 8/1/17
Service Validation Test Criteria accepted	Tue 8/1/17	Tue 8/1/17
<b>MILESTONE: Preparation and Testing Complete</b>	<b>Tue 8/1/17</b>	<b>Tue 8/1/17</b>
<b>MIGRATE PHASE</b>	<b>Mon 11/14/16</b>	<b>Mon 8/7/17</b>
<b>Office 365 Email Migrations</b>	<b>Mon 11/14/16</b>	<b>Tue 8/1/17</b>
<b>Pilot Migrations (25)</b>	<b>Mon 11/14/16</b>	<b>Tue 8/1/17</b>
Communication to Pilot Users	Tue 8/1/17	Tue 8/1/17
<u>Migrate Customer Pilot Group - (25 Mailboxes)</u>	<u>Mon 11/14/16</u>	<u>Mon 11/14/16</u>
User Support (Day After)	Tue 8/1/17	Tue 8/1/17
Migrate Customer Pilot Group Acceptance	Tue 8/1/17	Tue 8/1/17
<b>Velocity Migration</b>	<b>Tue 8/1/17</b>	<b>Mon 8/7/17</b>
<b>Cutover Velocity Migration</b>	<b>Tue 8/1/17</b>	<b>Thu 8/3/17</b>
<b>Migration Phase</b>	<b>Tue 8/1/17</b>	<b>Thu 8/3/17</b>
Communication to Users	Tue 8/1/17	Tue 8/1/17
<u>Migrate Velocity Cutover (150 users)</u>	<u>Tue 8/1/17</u>	<u>Wed 8/2/17</u>
End User Support	Wed 8/2/17	Wed 8/2/17
Communication to Users	Wed 8/2/17	Wed 8/2/17
<u>Migrate Velocity Cutover (165 users)</u>	<u>Wed 8/2/17</u>	<u>Thu 8/3/17</u>
End User Support	Thu 8/3/17	Thu 8/3/17
<b>Migration True Up</b>	<b>Wed 8/2/17</b>	<b>Mon 8/7/17</b>
Migration True Up	Wed 8/2/17	Thu 8/3/17
Post Migration Support	Thu 8/3/17	Mon 8/7/17
Velocity Migrations are Complete	Mon 8/7/17	Mon 8/7/17
<b>MILESTONE: Migration Phase is complete</b>	<b>Mon 8/7/17</b>	<b>Mon 8/7/17</b>
<b>Project Closeout and Exit Criteria</b>	<b>Mon 8/7/17</b>	<b>Mon 8/7/17</b>
Project closeout meeting complete (Deliverable)	Mon 8/7/17	Mon 8/7/17

# Project Management

ISC will work with the Customer to develop a project management plan. The Customer is responsible for providing overall direction and control of its O365 project team, its activities, and managing the project schedule and estimates. Project success will be highly dependent on successful collaboration between the Customer and ISC and timely completion of each team's responsibilities.

## Issue and Risk Management

The following general procedure will be used to manage active project issues and risks during the project:

- **Identify:** identify and document project issues (current problems) and risks (potential events that affect the project).
- **Analyze & Prioritize:** assess the impact, and determine the risks and issues of highest priority that will be managed actively.
- **Plan & Schedule:** decide how high-priority risks are to be managed, and assign responsibility for risk management and issue resolution.
- **Track & Report:** monitor and report the status of risks and issues, and communicate issue resolutions.
- **Control:** review the effectiveness of the risk and issue management actions.

Active issues and risks will be monitored and reassessed on a weekly basis. Mutually agreed-upon issue and risk management processes will be defined at the outset of the project.

## Change Management

Either party may request, in writing, changes (additions, deletions, or modifications) to the services described in this SOW (change request). For all change requests, regardless of origin, ISC shall submit to the Customer, ISC's standard Change Request Form, which shall describe the proposed change(s) to the project, including the impact of the change(s) on the project, scope, schedule, fees, and expenses. For all change requests that the Customer originates, ISC shall have a minimum of three business days from receipt of the change request to research and document the proposed change, and prepare the Change Request Form. Customer shall have three business days from your receipt of a completed Change Request Form to accept the proposed change(s) by signing and returning the Change Request Form. If the Customer does not sign and return the Change Request Form within the time period prescribed above, the change request will be deemed rejected and ISC will not perform the proposed change(s).

No change to this project shall be made unless it is requested and accepted in accordance with the process described in this section. ISC shall have no obligation to perform or commence work in connection with any proposed change until a Change Request Form is approved and signed by the designated Project Managers from both parties.

ISC and Customer will mutually agree in advance if the time required to research and document a Customer originated change request will be billed; if billed, it will be at the ISC contract rates.

### Escalation Process

The ISC project manager will work closely with the Customer project manager, sponsor, and other designees to manage project issues, risks, and change requests. The standard escalation process for review and approval or dispute resolution is outlined in the following section.

#### ***Escalation Path***

- Project team member (ISC or customer)
- Project manager (ISC and customer)
- ISC Services Delivery Executive or Engagement Manager and Customer Project Sponsor

#### ***Guiding Principles***

The escalation path and the related process will be discussed and finalized at the project kickoff; however, the following general guiding principles are expected to apply:

- Significant project issues, risks, and material change requests that cannot be resolved by the core project team will be escalated to the project sponsor as the final decision maker. The expectation is that the project sponsor will take positive action to resolve issues in a timely manner, accept or implement recommended mitigations for identified risks, and make final decisions on the disposition of proposed change requests.
- If a major unresolved item requires escalation prior to a scheduled project sponsor meeting, a special meeting will be scheduled, or the item will be escalated to the sponsor in writing.
- It is understood and agreed that if the project sponsor does not act to resolve items that are presented to him or her in a timely fashion, project schedule slippage and increased project cost can result, which could require additional change requests.

### Project Completion

The project will be considered complete when either of the following conditions is met:

- All the service deliverables identified within this SOW and any change requests accepted pursuant to the change management process defined in this document have been delivered and accepted or deemed to have been accepted.
- This SOW is terminated pursuant to the provisions of the agreement.

### General Assumptions

The services, fees, and delivery schedule for this project are based on the following assumptions.

#### ***Customer will perform or provide:***

- Involvement as required in all aspects of the project, including ability to provide accurate and complete information as needed; timely and effective completion of responsibilities, as identified herein; timely decisions and approvals by Customer's management.
- Assign a qualified project manager to plan and lead the project.
- Conduct a continuous project duration without gaps between phases.
- Provide information, data, systems, networks, decisions, and approvals as planned or within agreed upon timeframes.
- Assign Customer personnel to the project that have the appropriate business and technical knowledge of the current environment and the communication skills necessary to participate, time allocated to participate, and availability to perform their roles on the project team.
- Prepare the organization's desktops and accounts for the migration.
- Provide communications, training, and support to end users.
- Purchase required Office 365 licenses and validate those licenses are available to provision users.
- The Customer or its email service provider has full administration permissions for all identity and messaging environments.

***ISC will perform or provide:***

- Single contiguous project duration unless noted elsewhere. Delays or stoppages in the project at the request of Customer may subject Customer to additional fees.
- Any written materials will be provided in English.
- Work under this proposal will be performed remotely by ISC resources.
- Any deviation of the assumptions in this section or throughout this document will be handled as a change following the change management process.
- The availability of ISC representatives to perform their roles on the project team.
- The availability of the information required for properly envisioning and designing the solution.
- Timely availability of the hardware, software, and physical space for both the solution test and production environments.

## Communication Plan

The following will be used to provide formal communication during the project:

- The ISC project manager, working in conjunction with the Customer project manager, will document a communication plan for this project.
- The ISC project manager will assist the Customer project manager with the completion of weekly status reports for distribution to both the Customer and ISC management.
- Weekly status meetings will be held to review the project's overall status, the acceptance of deliverables, the project schedule, and open issues noted in the status report.

Project communications will adhere to the following. The overarching objective of project communications is consistency and transparency. All communications will be visible to all members of the project team. Email is the preferred method of communication and should include the created Distribution List called [CNMB@goisc.com](mailto:CNMB@goisc.com).

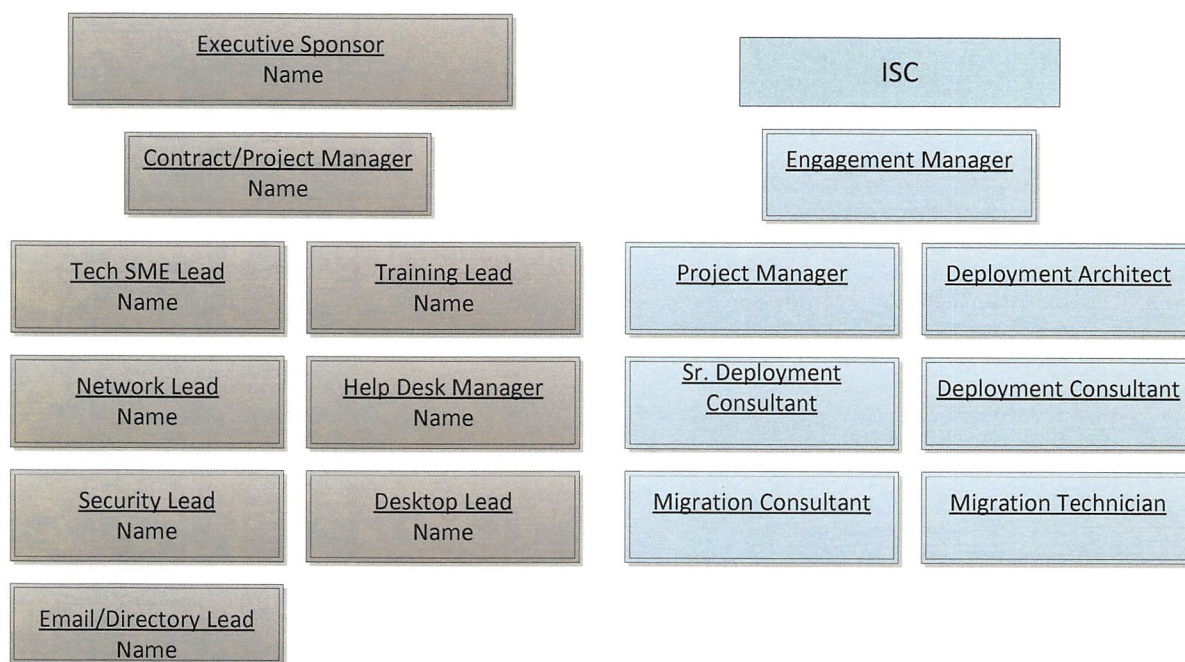
Communication	Description	Audience	Transmission	Interval	Responsible
<b>Project schedule</b>	Current project schedule status	City of Doral PM, ISC PM, Entire team, stakeholders.	Posted to SharePoint with email notification of posting to entire team stating What, Why and Effective date	Reviewed weekly during status meeting.	ISC PM
<b>Sync meetings – When needed</b>	Touchpoint review of status, risks and issues	Entire team	In person or via phone call	Weekly, Day to be determined	ISC PM
<b>Project documentation, including status reporting</b>	Any written deliverable or interim draft deliverable	Entire team	Posted to SharePoint with email notification of posting to entire team stating What, Why, and Effective date	As needed.	ISC PM & City of Doral PM
<b>Risk Identified</b>	Any risk identified by any team member	Executive Steering Committee	Posted to SharePoint. ISC PM emails notification of risk to ESC.	As needed. Reviewed weekly during the ESC Meeting and the Weekly Status Meeting	City of Doral PM
<b>Issue Identified, or Action Item Task</b>	Confirmed issue described that must be resolved	Executive Steering Committee	Posted to Issue Tracking Log posted on SharePoint. ISC PM emails notification of issue to ESC.	As needed. Reviewed weekly during the ESC Meeting and the Weekly Status Meeting	ISC PM and City of Doral PM
<b>All other communications, written</b>	Any communication to or from the project team	Entire team	Email or Discussion with a brief summary of the discussion.	As needed	ISC PM and City of Doral PM

<b>All other communications, oral</b>	Any meeting, call, or discussion to or from the project team	Entire team	Email or Discussion with a summary of the discussion.	As needed	ISC PM and City of Doral PM
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# Project Organization

For each project ISC assigns a dedicated Engagement Manager and Project Manager. These managers are your primary points of contact during the project. The project organization structure, reporting relationships, and key project roles are depicted below.



## Roles and Responsibilities

Both ISC and Customer must commit resources to the project to achieve success. We manage our resources carefully to provide you with the highest service and controlled costs. In keeping with best practices, ISC assigns team members when their specific expertise is needed. In the Remediate & Enable phase, for example, our migration specialist will have no assigned work. In this way, you are not charged for a resource not actively working on the project. Certain staff such as Project Managers and Deployment Consultants are allocated 100% to the project. To successfully complete this project, ISC and Customer must work as a team; the roles and responsibilities for each team member are shown in TABLE 10.

TABLE 10: ROLES AND RESPONSIBILITIES

<b>Customer Role</b>	<b>Customer Role Overview</b>
Customer Executive Sponsor	<ul style="list-style-type: none"> <li>• Makes key project decisions, assists in escalating unresolved issues to the Executive Steering Committee and clears project roadblocks.</li> <li>• Confirms that proper funding and support are provided for the success of the project.</li> <li>• Overall escalation points for change and issue management.</li> </ul>

<b>Customer Role</b>	<b>Customer Role Overview</b>
	<ul style="list-style-type: none"> <li>• End user and internal communications advocate.</li> </ul>
Customer Project Manager	<ul style="list-style-type: none"> <li>• Primary point of contact for the ISC Team, per assigned work stream.</li> <li>• Responsible for managing and coordinating the Customer activities within the plan.</li> <li>• Responsible for Customer's resource allocation, risk management, project priorities, and communication to executive management.</li> <li>• Manages day-to-day activities of the project.</li> <li>• Coordinates the deliverables activities of the Customer team according to the project schedule.</li> </ul>
Service Desk Lead	<ul style="list-style-type: none"> <li>• Responsible for problem resolution and first level incident management when the system is in production.</li> </ul>
Communications and Training Lead	<ul style="list-style-type: none"> <li>• Responsible for all communications within the Customer organization related to the move to O365.</li> <li>• Responsible for identifying and planning training within the Customer organization related to the move to O365.</li> </ul>
Technical Lead - Active Directory	<ul style="list-style-type: none"> <li>• Responsible for Active Directory implementation.</li> <li>• Participates in workshop discussions and facilitate and drive workshop tasks.</li> </ul>
Technical Lead - Network	<ul style="list-style-type: none"> <li>• Provides information on current network structures and plans.</li> <li>• Assists in network performance testing.</li> <li>• Will implement required Firewall, proxy, DNS and IP changes.</li> </ul>
Technical Lead - Security	<ul style="list-style-type: none"> <li>• Responsible for security policies, providing requirements, and establishing new policies based on the new environment.</li> </ul>
Technical Lead – Email	<ul style="list-style-type: none"> <li>• Responsible for current messaging infrastructure and integrates the O365 messaging environment on behalf of the Customer.</li> </ul>
Technical Lead - Desktop	<ul style="list-style-type: none"> <li>• Coordinates any required desktop software and patch management processes.</li> </ul>
Operations	<ul style="list-style-type: none"> <li>• Provides the daily support staff responsible for ongoing system management and recovery.</li> <li>• Responsible for creating policies and new operational models for the new architecture.</li> <li>• Creates operational guides for the new environment.</li> </ul>
<b>ISC Role</b>	<b>ISC Role Overview</b>
ISC Engagement Manager	<ul style="list-style-type: none"> <li>• Responsible for deliverable quality and overall satisfaction with our services.</li> <li>• Single point of contact for billing issues, personnel matters, contract extensions, and ISC project status.</li> <li>• Facilitates project reviews.</li> <li>• Facilitates project governance activities and leads the Project Steering Committee, providing advice and guidance on: <ul style="list-style-type: none"> <li>– Project direction and scope</li> <li>– Stakeholder communication issue resolution and escalation</li> </ul> </li> <li>• Demonstrated IT executive-level experience.</li> </ul>

<b>Customer Role</b>	<b>Customer Role Overview</b>
	<ul style="list-style-type: none"> <li>• Demonstrated O365 engagement experience with state and local government clients.</li> </ul>
ISC Project Manager	<ul style="list-style-type: none"> <li>• Responsible for managing and coordinating ISC activities within the plan.</li> <li>• Responsible for ISC resource allocation, risk management, project priorities, and communication to executive management.</li> <li>• Coordinates the deliverables activities of the team according to the project schedule.</li> <li>• Gathers and assembles all project deliverables.</li> <li>• Gather and assembles all project management plans, project status reports, and project performance reports.</li> <li>• Demonstrated O365 project management experience with state and local government clients.</li> </ul>
Deployment Architect	<ul style="list-style-type: none"> <li>• Provides technical oversight of implementation approach.</li> <li>• Single escalation contacts for technical issues.</li> <li>• Demonstrated experience in IT infrastructure/systems architecture planning and design, engineering, configuration, and optimization</li> <li>• Demonstrated O365 migration project experience with state and local government clients.</li> </ul>
Deployment Consultant	<ul style="list-style-type: none"> <li>• Implements Windows Azure Active Directory Service</li> <li>• Confirms readiness of any required migration hardware.</li> <li>• Performs build out of environments as described in the SOW.</li> <li>• Demonstrated experience implementing enterprise email migrations to O365 from multiple environments.</li> <li>• Demonstrated experience with and technical knowledge of virtual servers, web, client/server, and network.</li> </ul>
Migration Analyst/Specialist	<ul style="list-style-type: none"> <li>• Performs pilot and velocity migrations.</li> <li>• Provides migration status reports</li> <li>• Demonstrated experience with O365 migrations from multiple environments.</li> </ul>

# Cost Schedule

ISC is pleased to provide a Total Fixed Price for the services and deliverables outlined in this proposal/statement of work and will be invoiced by each project phase. The Total Fixed Price shall include all labor and materials. ISC will provide guidance to the Customer’s project team. The Customer is responsible for providing overall direction and control of its O365 project team, its activities, and managing the project schedule and estimates. Project success will be highly dependent on successful collaboration between the Customer and ISC and timely completion of each activity. TABLE 11 shows the ISC Cost Schedule. This price is inclusive of any third-party licenses used by ISC to perform mailbox migrations.

TABLE 11: ISC COST SCHEDULE

City of Doral - Office 365 Transition Services Fixed Price Costs		
Project Phase		Cost
Detail Discovery		\$3,644.96
Remediate and Enable		\$5,011.82
Planning		\$4,556.20
Prepare and Test		\$5,011.82
Email Migration		\$4,556.20
<b>Total Migration Services</b>		<b>\$22,781.00</b>
Post-Migration Support *		\$2,000.00
<b>Total Email Migration Costs</b>		<b>\$24,781.00</b>
Brainstorm QuickHelp Training for End-Users		
Brainstorm free QuickHelp Subscription (90 days) - retail value \$1,752		No Charge
<b>Total Email Migration and Tools Cost</b>		<b>\$24,781.00</b>
<b>Total Fixed Price</b>		<b>\$24,781.00</b>

(\*) MUST BE USED WITHIN 5 CONTIGUOUS BUSINESS DAYS

**Note(s):** Post-Migration Support hours must be used on contiguous business days immediately following Office 365 migration. Additional support hours required and approved by the Customer will be billed at an hourly rate of \$150 in one hour increments.

## ISC Consulting Services Agreement

This ISC Consulting Services Agreement is entered into between Customer and ISC. This agreement is effective on the date accepted and signed by Customer and ends on the services completion date set forth in the above Statement of Work.

### Terms and Conditions

**Agreement.** These Terms of Agreement represent the agreement (“Agreement”) between Customer and Imager Software, Inc. (“ISC”) and govern the products and services in the (“Services”) provided by ISC to Customer pursuant to the above Quote (the “Statement of Work”) submitted electronically to Customer by ISC.

**Term and Termination.** The term (“Term”) of this Agreement will begin on the date Customer accepts the Service Quote (the “Effective Date”), and will end upon the services completion date set forth in the Service Quote, (the “End Date”). Either party may immediately terminate this Agreement if the other party materially breaches this Agreement which breach is not cured within ten (10) days after receipt of written notice thereof.

**Payment.** All amounts payable by Customer for the Services (“Fees”) are due within thirty (30) days after delivery of the ISC invoice.

**Confidentiality.** Each party will keep the specific terms of this Agreement confidential and not disclose them to any third party without the other party’s prior written consent, except as required by law.

**Limited Warranty.** ISC warrants that ISC will perform Services in a professional manner in accordance with prevailing industry standards. EXCEPT FOR THE FOREGOING, ISC MAKES NO WARRANTIES, EXPRESS OR IMPLIED, INCLUDING THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT WITH RESPECT TO ITS SERVICES, OR THE FUNCTIONALITY, PERFORMANCE OR RESULTS OF USE OF ITS SERVICES.

**Limitation of Liability.** NOTWITHSTANDING ANYTHING TO THE CONTRARY CONTAINED IN THIS AGREEMENT, BUT WITHOUT IN ANY WAY LIMITING CUSTOMER’S PAYMENT OBLIGATIONS UNDER THIS AGREEMENT, (A) NO PARTY WILL BE LIABLE TO ANY OTHER PARTY (NOR TO ANY PERSON CLAIMING RIGHTS DERIVED FROM THE OTHER PARTY’S RIGHTS) FOR INCIDENTAL, INDIRECT, CONSEQUENTIAL, SPECIAL, PUNITIVE OR EXEMPLARY DAMAGES OF ANY KIND - INCLUDING LOST REVENUES OR PROFITS, LOSS OF BUSINESS OR LOSS OF DATA - ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT OR THE SERVICES PROVIDED HEREUNDER (INCLUDING WITHOUT LIMITATION AS A RESULT OF ANY BREACH OF ANY WARRANTY OR OTHER TERM OF THIS AGREEMENT), REGARDLESS OF WHETHER THE PARTY LIABLE OR ALLEGEDLY LIABLE WAS ADVISED, HAD OTHER REASON TO KNOW, OR IN FACT KNEW OF THE POSSIBILITY THEREOF, AND (B) ISC’S MAXIMUM LIABILITY ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT, ANY PRODUCT OR THE SERVICES PROVIDED HEREUNDER, REGARDLESS OF THE CAUSE OF ACTION (WHETHER IN CONTRACT, TORT, BREACH OF WARRANTY TORT, STRICT LIABILITY, NEGLIGENCE, MALPRACTICE, FRAUD OR ANY OTHER LEGAL THEORY), WILL NOT EXCEED THE AMOUNT PAID OR PAYABLE BY CUSTOMER TO ISC DURING THE TERM HEREOF.

**Miscellaneous.** Each party to this Agreement shall be acting as an independent contractor, and nothing herein shall be construed to create a partnership, joint venture or any type of agency relationship between ISC and Customer or any of Customer’s employees or agents. This Agreement contains the entire understanding of the parties. In the event that any of the provisions of these conditions shall be determined by a competent

authority to be invalid, unlawful or unenforceable to any extent, such provision shall to that extent be severed from the remaining provisions which shall continue to be valid to the fullest extent permitted by law. This Agreement and any disputes between Customer and ISC relating to this Agreement, shall be governed by and construed in accordance with the laws of the State of Florida. Each party's performance under this Agreement is subject to force majeure. All notices given hereunder shall be given by first class mail, return receipt requested or overnight courier, to the respective addresses set forth herein, and shall be deemed given upon actual delivery thereof. No terms of this Agreement are enforceable by any person who is not a party to it.

ISC

City of Doral



BY: \_\_\_\_\_  
(AUTHORIZED SIGNATURE)

BY: \_\_\_\_\_

NAME: Edwin Lott  
(PRINT NAME)

NAME \_\_\_\_\_  
: (PRINT NAME)

TITLE: Managing Partner, Consulting Services

TITLE: \_\_\_\_\_

DATE: April 21, 2017

DATE: April 21, 2017

## ISC Purchase Information

Prepared by: **Edwin Lott**  
Direct: (850) 893-6741 x1022  
Fax: (850) 893-1270

To efficiently process your order, please follow the guidelines below. Your organization's purchase orders cannot be processed without this information. We can accept a fax of your purchase order as an original.

OFFICE 365 Purchasers: Note: Microsoft Hosted Services, (OFFICE 365) is purchased directly from Microsoft.

Please complete the checklist below and return it with your purchase order:

- Make payable to "ISC"
- Billing address clearly marked
- PO Number marked clearly on purchase order
- Please make sure your PO is marked taxable if applicable or if you are tax exempt, please remit a copy of your tax exemption certificate along with your PO.
- Authorized Signature of Approval
  - Accounts Payable Contact \_\_\_\_\_
  - Accounts Payable Phone Number \_\_\_\_\_
  - Accounts Payable Email Address \_\_\_\_\_

Non-Government Entities who have NOT purchased from ISC via PO as of Jan 1, 2006, are required to include bank and credit references. A credit application may also be required.

If you are paying with a credit card, please follow the checklist below:

- Credit card type (Amex, Visa, MasterCard, Discover, P-Card)
- Card holder's name and email address (for e-receipt)
- Card number & Expiration date
- Card security code (CSC) from the back of credit card to be used
- Credit card billing address
- The user's name and email address

If you are paying via Wire Transfer, please follow the checklist below:

- Please Call the Accounts Receivable:
  - **Accounts Receivable Contact:**  
Bonnie Kistler  
(850) 893-6741 ext. 1029  
[bonnie.kistler@goisc.com](mailto:bonnie.kistler@goisc.com)



# CERTIFICATE OF LIABILITY INSURANCE

OP ID: LJ

DATE (MM/DD/YYYY)

05/16/17

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Franklin Insurance Agency, Inc. P. O. Box 3145 Tallahassee, FL 32315 Carlton W. Franklin, CPCU	850-681-0433	CONTACT NAME:
	850-222-8075	PHONE (A/C, No, Ext):
		FAX (A/C, No):
		E-MAIL ADDRESS:
		PRODUCER CUSTOMER ID #: <b>IMAGE-2</b>
INSURED <b>Imager Software, Inc., DBA I. S. Consulting STP, Inc Easy Territory, Inc 2932 Wellington Circle Tallahassee, FL 32308</b>		INSURER(S) AFFORDING COVERAGE
		INSURER A : <b>American Cas Co of Reading, PA</b>
		INSURER B : <b>Continental Casualty Company</b>
		INSURER C : <b>Southern Owners Insurance Co</b>
		INSURER D :
		INSURER E :
		INSURER F :

**COVERAGES**                      **CERTIFICATE NUMBER:**                      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<b>GENERAL LIABILITY</b>			1077103715	09/02/16	09/02/17	EACH OCCURRENCE \$ <b>1,000,000</b>
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>300,000</b>
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						MED EXP (Any one person) \$ <b>10,000</b>
							PERSONAL & ADV INJURY \$ <b>100,000</b>
							GENERAL AGGREGATE \$ <b>2,000,000</b>
							PRODUCTS - COM/OP AGG \$ <b>2,000,000</b>
							\$
A	<b>AUTOMOBILE LIABILITY</b>			1077103715	09/02/16	09/02/17	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b>
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS						PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> HIRED AUTOS			1077103715	09/02/16	09/02/17	\$
A	<input checked="" type="checkbox"/> NON-OWNED AUTOS			1077103715	09/02/16	09/02/17	\$
							\$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB			4515253501	09/02/16	09/02/17	EACH OCCURRENCE \$ <b>1,000,000</b>
	<input type="checkbox"/> EXCESS LIAB						AGGREGATE \$
	<input type="checkbox"/> OCCUR						\$
	<input type="checkbox"/> CLAIMS-MADE						\$
	<input type="checkbox"/> DEDUCTIBLE						\$
	<input checked="" type="checkbox"/> RETENTION \$ <b>5000</b>						\$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>			WC249045723	03/04/17	03/04/18	<input checked="" type="checkbox"/> WC STATUTORY LIMITS
	<input type="checkbox"/> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)						E.L. EACH ACCIDENT \$ <b>1,000,000</b>
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b>
							E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>
A	<b>Errors and Omissions</b>			1077103715	09/02/16	09/02/17	wrongful 2,000,000 ded 10,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)  
certificate holder is additional insured with regards to General Liability when required by written contract

<b>CERTIFICATE HOLDER</b>	<b>CANCELLATION</b>
CITYDOR	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
City of Doral 8401 NW 53rd Terrace Doral, FL 33166	AUTHORIZED REPRESENTATIVE 

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**RESOLUTION No.17-78**

**A RESOLUTION OF THE MAYOR AND THE CITY COUNCIL OF THE CITY OF DORAL, FLORIDA, PURSUANT TO SECTION 2-322 OF THE CODE OF ORDINANCES, APPROVING THE PURCHASE OF THE ISC MICROSOFT OFFICE 365 TRANSITION SUPPORT SERVICE, VIA STATE OF FLORIDA CONTRACT STC 80101507-SA-15-1A, IN AN AMOUNT NOT TO EXCEED \$24,741.00; AUTHORIZING THE CITY MANAGER TO ENTER INTO AN AGREEMENT, SUBJECT TO APPROVAL AS TO FORM AND LEGAL SUFFICIENCY BY THE CITY ATTORNEY, AND TO EXPEND FUNDS ON BEHALF OF THE CITY WITH RESPECT TO THE PURCHASE; PROVIDING FOR IMPLEMENTATION; AND PROVIDING FOR AN EFFECTIVE DATE**

**WHEREAS**, the City of Doral's (the "City") Information Technology Department ("IT") planned for the email migration to Microsoft Office 365, which includes planning, provision, deployment, migration, and post migration services; and

**WHEREAS**, the City may enter into bids or contracts entered into by other governmental authorities provided that the governmental authority has followed a competitive bidding procedure leading to the award of the bid or contract in question which is substantially similar to the competitive bidding procedure outlined in the City Code of Ordinances; and

**WHEREAS**, staff has recommended that the City Council approve the purchase of ISC Microsoft Office 365 Transition Support Service, via State of Florida contract STC 80101507-sa-15-1a, in an amount not to exceed \$24,741.00

**NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF DORAL, FLORIDA, AS FOLLOWS:**

**Section 1. Recitals.** The above recitals are confirmed, adopted, and incorporated herein and made a part hereof by this reference.

**Section 2. Approval.** Pursuant to section 2-322 of the City Code of Ordinances, the purchase of ISC Microsoft Office 365 Transition Support Service, via State of Florida contract STC 80101507-sa-15-1a, in an amount not to exceed \$24,741.00 is hereby approved.

**Section 3. Authorization.** The City Manager is hereby authorized to enter into an agreement and other contractual documents, subject to approval as to form and legal sufficiency by the City Attorney, as may be necessary to procure the Services under the GSA Agreement, and to expend funds in furtherance thereof in amounts not to exceed \$59,500.00 a year for a period of three (3) years.

**Section 4. Implementation.** The City Manager and City Attorney are hereby authorized to take such further action as may be necessary to implement the purpose and provisions of this Resolution.

**Section 5. Effective Date.** This Resolution shall take effect immediately upon adoption.

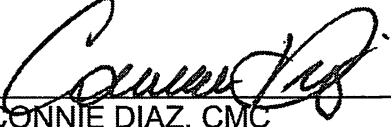
The foregoing Resolution was offered by Councilmember Rodriguez who moved its adoption. The motion was seconded by Councilmember Mariaca and upon being put to a vote, the vote was as follows:

Mayor Juan Carlos Bermudez	Yes
Vice Mayor Pete Cabrera	Absent/Excused
Councilwoman Christi Fraga	Yes
Councilwoman Claudia Mariaca	Yes
Councilwoman Ana Maria Rodriguez	Yes


PASSED AND ADOPTED this 10 day of May, 2017.

  
\_\_\_\_\_  
JUAN CARLOS BERMUDEZ, MAYOR

ATTEST:

  
\_\_\_\_\_  
CONNIE DIAZ, CMC  
CITY CLERK

APPROVED AS TO FORM AND LEGAL SUFFICIENCY  
FOR THE USE AND RELIANCE OF THE CITY OF DORAL ONLY:

  
\_\_\_\_\_  
WEISS, SEROTA, HELFMAN, COLE & BIERMAN, P.L.  
CITY ATTORNEY