AM No. 11-065(C5)

MEMO TO: City Council

FROM: John Marchione, Mayor

DATE: March 15, 2011

SUBJECT: **HIRING A CONSULTANT TO ASSIST WITH THE DEPLOYMENT OF WINDOWS 7 AND OFFICE 2010**

I. RECOMMENDED ACTION

Direct staff to proceed with hiring a consultant to assist Information Services with the deployment of Windows 7 and Office 2010 throughout the City. The selected consultant, Denali Advanced Integration, will assist with the deployment at a cost not to exceed $167,200.00.

II. DEPARTMENT CONTACT PERSONS

Mike Baily, Finance and Information Services Director, 425-556-2160
Linda Hermanson, Information Services Manager, 425-556-2170

III. DESCRIPTION/BACKGROUND

The 2009 IT Strategic Plan identified the goal of "Using information technology to streamline business processes, enhance City operations and support sustainability". One of the projects identified to help achieve that goal was the "Implementation of an improvement program for the City's finance and human resource management system." To further that end, the City partnered with Microsoft and Tyler Technologies to implement a leading edge Financial and HR/Payroll system. To support that effort, it has been necessary to move the underlying technology infrastructure to the most current versions including the desktop operating system and Office Suite.

Over the course of the last several months, Information Services has been preparing the technology environment at the network, desktop, and application levels for the deployment of Windows 7 and Office 2010. This has meant upgrading to the latest server and database versions, implementing Microsoft's virtual server software, Hyper-V, completing the setup of our automated deployment tool, System Center Configuration Manager, and becoming familiar with all this new technology.

On the desktop side, it's been necessary to determine an appropriate configuration for the Windows 7 operating system, the Office 2010 Suite along with the creation of a standard computer image that includes all the software to be loaded on all desktops

and laptops. Several test deployments of the resulting image have been conducted which has identified some issues that need to be addressed.

An inventory of the software loaded on existing desktops and laptops resulted in a list of nearly 2,500 executables that needed review to determine if they were a component of an application or an application itself. Each application has required a review to determine if it will run on the Windows 7 operating system, if an upgrade is required or another alternative is necessary in cases where the applications aren't and won't be ready for Windows 7. Decisions about eliminating, waiting on application replacements (as in the case of the financial, permitting, and Fire records management systems) or implementing other alternatives that will allow the software to exist in this new environment continue to be made.

The decision was made to seek assistance from a consulting firm because they have experience doing these deployments and know the best way to accomplish it, the deployment can be completed in a relatively short period of time and their resources could be fully dedicated to the effort unlike Information Services staff who have been working on this project part time while continuing to ensure the day-to-day activities don't fall behind. Denali Advanced Integration also has expertise in the use of our deployment tools, will ensure there is a transfer of knowledge to I.S. staff, and can conduct training for City staff in the use of the new operating system and Office suite.

IV. IMPACT

A. **Service Delivery**: The entire City will benefit from the use of the latest technology available not only in the operating system and Office suite but the upgrades to the many applications used by City staff that will have a wide variety of improved functionality. Information Services will benefit from gaining a deeper understanding of their deployment toolset which will allow the group to deliver a higher quality and timeliness of service to City staff.

B. **Fiscal**: The proposal is for $167,200.00. Funding to pay for the contract is in the IT Strategic Plan budget.

V. ALTERNATIVES TO STAFF RECOMMENDATION

A. **Do not approve proceeding with consultant assistance**: It is expected that the outcome of using consulting assistance will result in a compressed timeframe for the rollout, it will leverage deployment expertise we currently don't have in-house and will ensure best practices are put into place in the use of our tools so we can take full advantage of our ability to deploy software on an ongoing basis. While Information Services could continue to move this project forward without assistance, the timeline would be extended greatly but more importantly, there would be a missed opportunity to gain a wealth of knowledge that will benefit the group for a long time to come.

VI. TIME CONSTRAINTS

The most pressing time constraint is related to the financial system go-live date of July 5, 2011. The individuals who will be interacting with the new financial system will need to have a Windows 7/Office 2010 machine at the time of go-live. Having a very solid roll out process in place by that time will directly affect the success of both projects.

VII. LIST OF ATTACHMENTS

Attachment A: Denali Advanced Integration Statement of Work

/s/ 03/09/2011
Mike Bailey, Finance and Information Services Director Date

Approved for Council Agenda: /s/ 03/10/2011
John Marchione, Mayor Date

Attachment A

Microsoft System Center Services
Windows 7 Upgrade and Refresh Project

STATEMENT OF WORK

Prepared By

DENALI ADVANCED INTEGRATION

3MD Inc., d/b/a
Denali Advanced Integration
17735 NE 65th St. Suite 130
Redmond, WA 98052
Phone: 425.467.8000
Fax: 425.467.1127

Prepared for

City of Redmond

February 21st , 2011

OBJECTIVES

City of Redmond has identified the need for assistance from a Sr. level Architect / Solutions Engineer for the already implemented System Center Configuration Manager (SCCM). Services will also include the need for a Solutions Engineer in Operating System deployment and Application Packaging. The proposed SOW is based on the City of Redmond's request to have support for End-To-End deployment support.

The key objectives of this project are to:

1. Client Management
2. Application Compatibility Assessment
3. Inventory Management
4. Operating System Deployment (OS Deployment)
5. Application Management
6. Deployment Services (Advanced Operating System & Task Sequencing)
7. Support Services (Pre and Post deployment)
8. Deployment of Enterprise Desktop and Server tools for integration and support of System Center products.
9. Provide Knowledge Transfer on all key components of SCCM Deployment Methods and a basic overview of features to all City of Redmond Technical Staff.
10. Provide clearly documented "Run-Books" upon close of project for continued support and future deployments.

Service Areas within Scope

The Denali System Center solution services will include a series of design, project planning, and implantation steps. To enable a successful implementation the solution project plan should be followed and both parties liable for any scope creep, unavailable resources, and technical problems. The scope will be limited to the following:

System Center Configuration Manager

- Design and Planning Sessions focusing on:
  - Defining City of Redmond requirements
  - Design Deployment Groups and Organization
  - Define any additional infrastructure requirements / recommendations
  - Define expectation around Reporting and Deployment Completion
  - Development of **SCCM Deployment Plan**
- Hardware Inventory and Assessment
  - Creation of Custom Reports
  - Build "Supported" Deployment reports
  - Define Client and Inventory Problem Reports
- Client Management
  - Collection Groups
  - Client Health & Remediation
  - Development of User State Process
  - Folder Redirection Support (Work provided by City of Redmond Staff)
  - Build Client Agent Repair process (Including Patch deployment)
  - Credential and Role Based Security
  - Reporting Services
  - Tasks and Incident Creation
  - Build of Automated Workflows

- Integration with City of Redmond Infrastructure services (Active Directory and other System Center Products)
- OS Deployment
  - Windows 7 Deployment Project Planning & Processes
  - Build Base Image
    - Zero Touch
    - Lite Touch
  - Develop Upgrade Process
  - Create OS Deployment Scripts
  - Build Net-New Device Driver Packages
  - Build User State Migration Scripts
  - Test and Validate Bare-Metal installs (Up to 12 Devices)
  - Develop Client Delivery Kits
  - Modify Client Scripts and Deployment Remediation
- Deployment Services
  - Plan initial Deployment Process
  - Design OU / Group Policy process (Work with City of Redmond staff)
  - Build Task Sequences / Programs / Updates Process
  - Develop Driver Packages / Harvesting
  - Plan Initial Pilot
  - Test Small IT Deployment
  - Validate USMT
  - Validate Folder Redirection
  - Remediate Small IT Deployment
  - Build Small (NON IT) Pilot for Deployment (20 Devices Max)
  - Support & Triage NON IT Pilot Deployment
  - Update Task Sequences / Programs / OS Deployment Process
- Build Desktop and Server Deployment
  - Define Provision / DE-Provisioning Logic
  - System Center Configuration Manager Deployments
- Customer Knowledge Transfer & Training
  - Hands on Training
  - Video Led Training
- Maintenance Configuration
  - Assist in Backup definitions
  - System Disaster Recovery Plan
- Guides
  - Build and Hand off Troubleshooting guides

Application Packaging / Engineer Services

- Application and Software Inventory:
  - Develop Software Meters
  - Collapse Software Versions (into suitable / deployable list)
  - Create Application Tracker
- Application Compatibility Toolkit
  - Build ACT Database
  - Install Agents for Client Validation
  - Verify if SHIM's are available for any supported applications
  - Develop Packages for SHIM / Updates.
- Design and Planning Sessions focusing on:
  - Defining City of Redmond requirements
  - Development of Credentials list
  - Identification of Application Task Owners
  - Build Application Standards
- Application Packaging / Installation
  - Scheduling of Applications list

- Assess of Inventory (supported Windows 7 applications)
- Installation of all Server(s) Prerequisites
- Installation of Core Software Library
- Application Packaging
  - Assess and Test Installation type (Supported by Application)
  - Verify if Custom MSI will provide simpler installation (**Packaging Software Required**!)
  - Test and work through deployment validation for each application in **Application Tracker**
  - Build Task Sequences & Program Groups
  - Pilot Software Deployment to Current Clients
  - Pilot Software Deployment to Net-New devices
- Creation of Software Meters
  - New Software Meters for SCCM Deployed / Windows 7 Software
- Windows 7 Deployment Support
  - Work with Solutions Team and City of Redmond staff on OS Deployments
    - Windows 7 Upgrade support through the end of June is assumed for this project.
    - Further support past July 1st would be handled as Change Request or Services Contract
  - Validate OS / Application Deployment Processes
  - Client Deployment Customer Support
    - Availability after OS Deployments to Customer Group
- System Center Support
  - Provide Basic Support Services in SCCM related to OS Deployment and Application Packaging

Service Areas Out of Scope

Any area that is not explicitly listed in as "within scope" is out of scope for this engagement. The areas that are out of scope for this engagement include, but are not limited to, the following:

- Development of processes surrounding workflow or ticketing procedures.
- Infrastructure remediation (Server & Network Related)
- Modifying and stabilizing the current client environment
- All network-related issues that need troubleshooting
- Installation of physical hardware
- Installation of Windows Server Operating Systems
- Application packaging and sequencing outside of **Application Tracker**
- Industry regulatory compliance requirements
- Virus Protection
- Backups of the work. You will be responsible for making sure the systems are adequately protected and backed up regularly.
- Integration with any custom deployment databases or tools
- Integration of deployed desktop to servers components including SharePoint

APPROACH

Key Customer Activities

Based on customer and engaging consultant availability the "weekly" breakdown is only an estimate. Typically these types of implementations can "take" longer to complete the specified phase 5 day / 40 hour cycle.

In addition to the general customer responsibilities you are responsible for:

Prior to Week 1

- Complete pre-engagement questionnaire
- Preparation of required hardware and software to support the production environment
- Appropriate Access rights for all Denali staff that will be engaged.

Prior to Week 1 through Close

- Participate in Weekly Status / Update Meeting
- Continue to validate and support Denali staff in OS Deployment Project

Week 1 Through 3

- Participation of appropriate personnel in the design process
- Participation in the planning sessions and staffing meeting.
- Completion of any documents or questionnaire provided as output.
- Develop list of required resources associated to the following:
  - Server Team Technical Resource
  - Desktop Team Technical Resource
  - Help Desk Technical Resource
  - Asset Management / Procurement
  - Change Manager
- Executive Sponsor **Sign-Off** on developed plan.

Week 3 through 7

- Build of Physical or Virtual Desktops meeting the requirements specified in the **SCCM Deployment Plan**.
- Access to production machines to perform work
- Participation in configuration and task sequence processes

Week 8 through 17

- Participation in implantation items and all other installation processes
- Assist in all Pilot activities
- Approve / Validate Workflows

Week 17 through Close

- Continued support and availability of implementation team needs
- Development of appropriate schedule for Training sessions
- Complete training forms
- Sign-Off of Training and Knowledge Transfer items.

* Note: During the Development of Project Plan further detail of **Customer Activities** will be listed.

Key Service Deliverables

Following is a list of key project service deliverables that will be delivered within this **Statement of Work:**

Current Estimated Start Date : March 21st 2011

Resource	Category	Task Name	Estimated Completion
Staff Augment	Application Management	Application Packaging	June
Staff Augment	Application Management	Program Groups and testing	May
Staff Augment	OS Deployment	Build Driver Packages	April
Staff Augment	Application Management	Build Application Packages & Task Sequences	May
Staff Augment	OS Deployment	Windows 7 Upgrade Support (Deployment & Remediation)	June
Staff Augment	OS Deployment	Build of Client delivery kits and Guides	May
Staff Augment	Support Services	Build Client Training (Hands on) provided in the City Lab	April
All	Deployment Services	Test Small IT Deployment	End of April
COR IT Staff	Client Management	Folder Redirection/Roaming Office Profiles	Unknown
COR IT Staff	Deployment Services	Test Small Group of Upgrade Devices	Unknown
All	Deployment Services	Develop Task Sequnces / Programs / Update Porcesses	April
All	Deployment Services	Deploy initial pilot users (non IT)	May
Project	Project Coordination	End to End Project Coordination and Management	July
MSIO	Assessment	Full Environmental Assessment	Feb
MSIO	Inventory	Hardware Inventory & Assessment	March
MSIO	Client Management	Client Health Remediation	April
MSIO	Client Management	Remediation & Site Clean up	March
MSIO	Application Management	Application Standardization	April
MSIO	OS Deployment	Windows 7 Deployment Planning & Preparation	May
MSIO	OS Deployment	Design & Implement Deployment OU / Group Policies	April
MSIO	Client Management	Fix City Wide Config Manager Clients	March
MSIO	OS Deployment	Develop Deployment & Upgrade Plan	April
MSIO	Client Management	Develop User State Process	April
MSIO	OS Deployment	Zero Touch	May
MSIO	OS Deployment	Lite Touch	May
MSIO	OS Deployment	User State Migration Process	May
MSIO	Deployment Services	Plan initial Pilot deployment	April
MSIO	Deployment Services	Deployment Remediation	May
MSIO	Application Management	Software Metering	April
MSIO		**Deployment Remediation**	
MSIO	Deployment Services	Issues with Drivers	
MSIO	OS Deployment	Modify Deployment Scripts to remediate any roll out problems	May

PROJECT ROLES AND RESPONSIBILITIES

Role	Responsibility
Project Coordinator	■ Manages the engagement ■ Provides resources as necessary ■ Tracks all deliverables ■ Provides weekly status reporting to Customer team ■ Helps resolving engagement issues ■ Reviews customer satisfaction report with customer
Engineer/Application Packager	■ Provide Application Packaging Services ■ Leads all application discussions and workshops ■ Develop Application assessment ■ Creates Tasks and Programs for Delivery ■ Provides all implementation services and coordinates any additional Sr. Engineering resources from Denali
Sr. Consultant & Sr. Engineer	■ Conducts pre-engagement with customer ■ Conducts the assessment ■ Creates engagement deliverables ■ Provides all implementation services and coordinates any additional Sr Engineering resources from Denali ■ Helps customer to validate the proof of concept ■ Presents the kickoff and final presentations ■ Provides weekly status updates to Project Coordinator
Customer Technical Lead	■ Assists us during discussions and meetings ■ Provides input during discussions and meetings ■ Leads in determining scope of the desktop virtualization effort ■ Assists us during the proof of concept ■ Leads setting up the proof of concept lab ■ Assists us validate the proof of concept ■ Assists with managing scope control of the project with a defined change management process ■ Has the ultimate responsibility for the project.
Customer Project Sponsor	■ Ensures technical resources are available when needed ■ Makes key project decisions ■ Assigns key customer technical lead ■ Reviews deliverables ■ Ensures facilities are available as needed ■ Resolves critical-path issues in a timely manner ■ Attends Closeout meeting Participates in completing engagement evaluation

GENERAL CUSTOMER RESPONSIBILITIES AND PROJECT ASSUMPTIONS

Key Assumptions and Client Responsibilities

The services, fees, and delivery schedule for this project are based upon the following assumptions:

- City of Redmond will assign an individual to be the focal point for the City of Redmond team that will be assigned responsibilities to participate in key project activities and be made available to meet the project schedule.
- Denali consultants will perform project work both on–site and remotely and will require remote access to the City of Redmond system.
- City of Redmond agrees to comply with all reasonable requests by Denali and to provide access to all documents, City of Redmond Subject Matter Experts, training and equipment reasonably necessary for the performance of Denali's duties under this SOW.
- City of Redmond agrees provide Denali with timely access to their environment and use of all information and facilities necessary for Denali to perform Project Work. This includes access to the environment computers over the internet.
- Unless otherwise specified as a Denali service, all associated system hardware and firmware must be maintained by City of Redmond to the latest required version required to support Project Work.
- Denali has made every attempt to accurately estimate time required to successfully complete the project. City of Redmond acknowledges all listed assumptions and responsibilities and agrees that should these be violated, if impediments or complications arise or if changes in scope are requested or required, the length of the project and associated price could be impacted.
- Denali is not responsible for delays caused by failures, including but not limited to, failures caused by systems, personnel or environmental causes or in using incorrect or insufficient data provided by City of Redmond.
- Denali will not be responsible for any necessary OS installations, patching or network configuration changes that might be required in support of this project. City of Redmond organization will respond in a timely manner to support these potential needs.
- City of Redmond maintains appropriate hardware warranties, software licenses, and support agreements with vendors whose products are utilized and/or affected during the execution of this SOW.
- Denali will be granted Administrative Access to all Servers defined in associated Projects.
  - Active Directory
  - System Center Configuration Manager Server(s) – Including Distribution Points.
  - System Center SQL Server
  - Server / Desktop Deployment devices
- Media and license for software and additional components is purchased, onsite and accessible by Denali Solutions Architect at the initiation of the project
- Standard image desktop as part of the testing, configuration, and implementation phase. - The machine will be used to run Agent console, allowing the Denali Solutions Architect to troubleshoot and verify local logs. This will also have planning tools installed for analysis

Project Resourcing

- Provide, as needed, personnel knowledgeable in your current systems, design, and architecture.
- Provide necessary work site access in addition to necessary access to your systems logons and passwords.
- Provide suitable work spaces with desks, chairs, and telephones.
- Provide local area network (LAN) connections that enable access to the Internet and e-mail for the on-site team.

In performing our services under this *Windows 7 Deployment Services* we will rely upon any instructions, authorizations, approvals, or other information provided to us by Denali's Project Manager.

Project Critical Success and Risk Factors

The following items need to be considered by both parties as critical to the success of the project:

Item	Project Implications
Client involvement in all project processes and gain knowledge transfer.	A Client Resource will be integrated into the project schedule to participate in key activities with the Denali consultants.
Access to the appropriate stake holders and key users in the organization when developing the requirements.	City of Redmond will be responsible for identifying the key organizational requirements of the implementation through the assessment process.
Availability of key internal project team members to prioritize their schedules to optimize the time of the consulting team to maintain an aggressive project time line.	City of Redmond agrees to make the people assigned to the project and participating internal subject matter experts available to meet the project schedule and meetings as a priority task.
Quality of the consulting team used to assist the organization.	All Denali resources assigned to the team will have significant experience in the areas they are assigned.
Requirements clarity.	The assessment/planning phase of the project will be reviewed and signed off by both parties before proceeding to implementation of the improvements.
Consistent, proven Project Approach.	Denali will utilize their proven project methodology in executing this project.
Controlling scope.	The scope of the project will be confirmed with this agreement sign-off. If any additional requirements are identified which will push the scope out, it will only be done with a change request.
End User acceptance and adoption is the ultimate measure of success and must be a focus of the project through all phases of implementation and support.	As part of the project approach, the project team (City of Redmond and Denali resources) will continually consider the user frame of reference and requirements. Denali will bring to bear their experience in multiple projects to make recommendations on features that will improve usability.

Fees and Products

The is a breakdown of Fee's and associated Business Units, as provided by City of Redmond:

Resource	Estimated Cost	Estimated Time	Products
Sr. Solutions Architect Sr. Solutions Engineer	$80,200.00	71 to 80 Days	Service Manager Core
Application Packaging Deployment Support	$51,000.00	80 to 100 Days	Service Manager Core
Project Coordination	$36,000.00	60 to 80 Days	

Total Fee

Our fee for System Center Services: Windows 7 OS Deployment, solution is estimated at: **$167,200.00** as an estimated, not to exceed rate of services. All associated resources will be done on a Time and Materials basis. Any additional work that is identified will only be conducted after a change order request is signed off by both parties.

On signing this proposal, Denali will work with City of Redmond to establish a kick-off date and schedule for the work to optimize the involvement of key City of Redmond team members.

Billings

Invoices for this project are due and payable by the City of Redmond (30) days from the day that Denali issues the invoice. Invoices will be processed monthly.

Contacts and Escalation

The following representative from Customer, or their successor or designee, will be considered the point of contact and will have authority to represent Customer with respect to this SA:

Name:	
Title:	
Mailing Address:	
Phone:	
Email:	

The following representatives from Denali, or their successor or designee, will be considered the Denali Account Manager(s) and will have authority to represent Denali with respect to this SA:

Name:	Doug Both
Title:	Account Executive
Mailing Address:	17735 NE 65th St. Redmond, WA 98052
Phone:	(425)943-4248
Email:	Dbooth@Denaliai.com
Name:	Christian Booth
Title:	Director, Microsoft Solutions Core I/O
Mailing Address:	17735 NE 65th St. Redmond, WA 98052
Phone:	(253)330-7187
Email:	CBooth@Denaliai.com

Acceptance and Authorization

IN WITNESS WHEREOF, the parties have executed this SA by their duly authorized representative.

City of Redmond		**Denali Advanced Integration**	
("Customer")		("Denali")	
By (Sign):	_____	By (Sign):	_____
Name (Print):	_____	Name (Print):	**Christian J Booth**
Title:	_____	Title:	**Directory MS Core I/O**
Signature Date:	_____	Signature Date:	_____

Change Control Form

DENALI ADVANCED INTEGRATI FOCUS • COMMIT • DELIVER	Change Request Form		
City of Redmond Name:			
Project Name:			
Denali Project Manager:			
Requestor:		Date of Request:	
Change Request ID:		Priority:	
Current Condition			
Proposed Change			
Reason			
Change Management Information			
Cost Impact:			
Timing Impact:			
Quality Impact:			
Scope Impact:			
People/Role Impact:			
Process Impact:			
Technology/System Impact:			
Name/Signature			
/		/	
/		/	
/		/	
Follow Up			
Approved?			
Documentation Updated:		Date Change Implemented:	