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# CITY OF POMONA

## COUNCIL REPORT

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July 1, 2024

To: Honorable Mayor and Members of the City Council

From: Anita D. Gutierrez, City Manager

Submitted By: Sam Wong, Innovation and Technology Director

**SUBJECT: AWARD OF CONTRACT TO AGREEYA SOLUTIONS INC. FOR  
MICROSOFT OFFICE 365 MIGRATION SERVICES**

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### **RECOMMENDATION:**

It is recommended that the City Council take the following actions:

- 1) Approve the award of a Professional Services Agreement (PSA) to AgreeYa Solutions, Inc. ("AgreeYa") in an amount not-to-exceed \$239,300 to migrate and implement Microsoft Office 365, a cloud-based platform for email communication, collaboration tools, and office productivity software; and
- 2) Authorize the City Manager to execute the agreement and any extensions or amendments thereto on behalf of the City, subject to review by the City Attorney.

### **EXECUTIVE SUMMARY:**

Approval of the recommended action will allow the City of Pomona to leverage the expertise demonstrated by AgreeYa Solutions, Inc. ("AgreeYa") to modernize and replace core office technology solutions staff relies on to complete essential job functions.

### **SB1439/GOVERNMENT CODE §84308 APPLICABILITY:**

☐ When this box is checked, it indicates the agenda item is subject to the Levine Act SB1439 requirements. Councilmembers are reminded to check their campaign contributions and determine whether they have received a campaign contribution of \$250 or more that would require disclosure and/or recusal from discussing or acting on this agenda item. Campaign contributions of \$250 or more made 1) by any person or entity who is identified in the agenda report as the applicant or proposer or 2) on behalf of the applicant or participant, including a parent, subsidiary or otherwise related business entity, or 3) by any person who has a financial interest in the agenda item requires a councilmember to comply with SB1439.

## **FISCAL IMPACT:**

The recommended term for the AgreeYa agreement is for FY 2024-25, commencing on July 1, 2024, and continuing until the project's completion. An annual renewal of subscription license costs is anticipated following project completion and the conclusion of the first year. The payment terms of migration services with AgreeYa for FY 2024-25 will be structured around project milestones. The payment milestone table is provided in Table 1:

**Table 1**

<b>Payment Milestone</b>	<b>Amount</b>
<b>Milestone 1</b> – Submission of Project Plan	\$17,325.00
<b>Milestone 2</b> – Submission of Assessment Report	\$17,325.00
<b>Milestone 3</b> – Completion of Pilot Migration	\$24,255.00
<b>Milestone 4</b> – Project Signoff	\$10,395.00
<b>Total Cost of Migration Services</b>	<b>\$69,300.00</b>

The total cost this fiscal year is not-to-exceed \$239,300.00 which includes the fees for Microsoft Office 365 migration services rendered by AgreeYa and one year of software subscription costs associated with the implementation. A breakdown of costs is provided in Table 2:

**Table 2**

<b>Item</b>	<b>Amount</b>
Migration Services Cost	\$69,300.00
Office 365 Subscription Cost (For Year 1) – Billed Annually	\$170,000.00
<b>Total Cost of Services and Subscriptions</b>	<b>\$239,300.00</b>

The funding to facilitate this migration effort is available in the FY 2024-25 Operating Budget for the American Rescue Plan Budget under account 191-1410-52285-10059. Sufficient funding for annual software subscription costs in future fiscal years will be budgeted accordingly from the Information Technology Fund.

## **DISCUSSION:**

The City of Pomona utilizes Microsoft solutions for digital communications and office productivity, such as Microsoft Exchange for e-mails and calendars and Microsoft Office for collaboration. Today, the City operates dated versions of Microsoft Exchange and Microsoft Office that are nearing end-of-life (EOL). Migrating to Microsoft Office 365 offers numerous benefits, including enhancing the City's efficiency and collaboration capabilities, transitioning from an on-premise environment to a cloud-based platform, empowering staff with advanced tools like Teams for messaging and video conferencing, and utilizing SharePoint for document management to facilitate seamless collaboration across departments. Moreover, adopting Office 365 aligns the City with industry best practices including cybersecurity, thus better positioning the City to adapt to future advancements. Completion of this project will lead to improvements in

internal processes, enhance communication, and provide a unified and modernized IT infrastructure.

The City conducted a two-phase bidding process in order to determine the most qualified vendor for this service. The first phase was a Request for Qualifications (RFQ), 2024-09, posted on February 12, 2024 with qualifications due March 11, 2024. This resulted in eight proposals, where five were prequalified and selected to move onto the next phase. On April 4, 2024, the Request for Proposal (RFP), 2024-22, was released to the five prequalified vendors resulting in 3 proposals.

Based on the evaluation criteria specified in the RFP, proposals were scored and ranked by an evaluation committee comprised of IT department staff members. Reference checks were conducted for each of the top three scoring proposers. AgreeYa Solutions, Inc. achieved the highest score based on the evaluation scores submitted by the committee and the projected cost of the proposed services to be rendered. The combined scores for the RFP are detailed as follows:

**Combined Scores**

**Microsoft Office 365 Migration**

**RFP No. 2024-22**

<b>Rank</b>	<b>Firm/Proposer</b>	<b>Score (400 max)</b>
<b>1</b>	AgreeYa Solutions, Inc.	<b>321.38</b>
<b>2</b>	SDI Presence	<b>300.00</b>
<b>3</b>	Communication Square LLC	<b>280.64</b>

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