

**RESOLUTION NO. 2019-99**

**RESOLUTION AUTHORIZING THE VILLAGE OF CALEDONIA TO PURCHASE MICROSOFT OFFICE365 AND THE RELATED CONVERSION/IMPLEMENTATION COSTS TO BE UTILIZED ON VILLAGE COMPUTERS**

**WHEREAS**, the Village of Caledonia has identified that current infrastructure as relates to e-mail and operating systems is current failing and insufficient for current usage; and

**WHEREAS**, the Village of Caledonia Finance Committee has reviewed information presented by Village staff and have determined that implementation of Microsoft Office 365 is the solution to this issue; and

**WHEREAS**, the Village has identified a vendor who can provide for the Microsoft Office 365 licenses for all applicable outlook accounts for \$12,311.34/year with a government enterprise license in the government cloud for a term of three years. The Village has also identified a vendor that will provide for the implementation and conversion to Microsoft Office365 for \$10,667.00

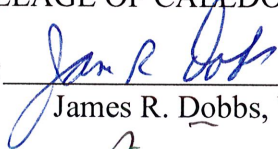
**WHEREAS**, the Finance Department anticipates adequate surplus funds in the Equipment Replacement fund account to cover this purchase. Subsequent years of the licensing agreement will be budgeted for in future years.

**NOW, THEREFORE, BE IT RESOLVED** by the Caledonia Village Board that the Village purchase and install Microsoft Office 365 at a cost not to exceed \$22,978.00, from the Equipment Replacement fund.

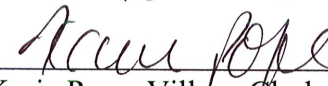
Adopted by the Village Board of the Village of Caledonia, Racine County, Wisconsin, this 21<sup>st</sup> day of October, 2019.

VILLAGE OF CALEDONIA

By: \_\_\_\_\_

  
James R. Dobbs, Village President

Attest: \_\_\_\_\_

  
Karie Pope, Village Clerk

## CCB Technology

2823 Carlisle Avenue  
Racine, WI 53404



### Office 365 Data Only Cutover Migration Proposal for Village of Caledonia

Date	Migration Type	Services Performed By:	Services Performed For:
October 3, 2019	Exchange	(Service provider)	(Client)
Created by		CCB Technology	Village of Caledonia
Nik Lipor		2823 Carlisle Avenue Racine, WI 53404	5043 Chester Ln. Racine, WI 53402

### Project Estimate

The following outlines the estimated cost for this Statement of Work, pricing is valid for 60 days.

Description	Qty	Unit Cost	Total Cost
<b>Total number of Mailboxes &amp; Other Items to be migrated</b>			
- Up to 120 Mailboxes, 4 Room Resources, 16 Distribution Groups, 0 Mailbox Forwards, 3 Shared Mailboxes			
Mailbox Forwards, 3 Shared Mailboxes	-	\$ 5,375.00	\$ 5,375.00
SkyKick Full Migration Suite	127	\$ 21.00	\$ 2,667.00
Setup (4) Additional Mail-Enabled Domains	4	\$ 175.00	\$ 700.00
Setup Azure Active Directory Connect	-	\$ 1,050.00	\$ 1,050.00
Setup Encrypted SMTP Relay Server	-	\$ 875.00	\$ 875.00
<b>Total Migration Cost</b>			<b>\$ 10,667.00</b>

\*CCB will invoice Village of Caledonia in a four-week cycle or upon project completion, whichever comes first.

\*\*CCB will invoice Village of Caledonia upon completion of each fixed cost milestone within the project.

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## Summary

CCB Technology is pleased to offer Office 365 Exchange Online implementation services to Village of Caledonia to replace the existing email infrastructure. Office 365 provides the optimal platform for email, collaboration, and intranet services. Exchange Online, a component of Office 365, provides the ability for Village of Caledonia to seamlessly transition existing email services to a cloud hosted solution with full enterprise email capabilities including: email archiving, data loss prevention, mobile device and anytime/anywhere access.

## Scope of Work

CCB Technology will utilize industry leading tools recommended by Microsoft to perform your migration.

CCB's cutover migration includes:

- Project Management
- Email Environment Assessment
- Mailbox Discovery
- Optional Firewall configuration (If Village of Caledonia does not wish to provide CCB with credentials, Village of Caledonia will take responsibility for the configuration of the Firewall. CCB Technology can provide information for Village of Caledonia on firewall ports/URLs required)
- Add/register domain name in Office365
- Account & User provisioning
- Setup internal and external auto discover for Office 365 (requires DNS and Exchange Server access)
- Migrate User Accounts – refer to [Data migrated](#) for more info
- Configure External and Internal DNS records
- Unless noted above, services are to be provided within the normal business hours or 8:30 AM – 5:00 PM CST, Monday – Friday. Any services performed after hours will be billed at their corresponding rates below.

### *Optional Items included in the scope of this project*

- 5 Mail-Enabled Domains ([refer to Appendix B](#))
- Setup Azure Active Directory Connect
- Encrypted SMTP relay implementation

### *Deliverable Materials*

- Full Assessment of Exchange infrastructure.

### *Project Management Details*

CCB Technology will provision an account in our project management and ticketing system for each Client point of contact, which they can use to track project progress. In addition, CCB Technology agrees to provide the following project management communications:

- Project task and progress tracking via CCB's project management portal.
- CCB Technology engineers utilize primarily email, but also phone and Skype to communicate with Client project team.
- Project closure meeting to ensure all project objectives are completed, unless either party has terminated this contract for cause. Client acknowledges that they will be billed for any work performed up to time of contract termination.



## Exchange Online Migration

The following outlines the standard project task list for this project. Variations to the project may be required based on Client environment.

### Pre-Migration Date

1. Setup client portal for project tracking and ticketing for Client Project Team.
2. Conduct Active Directory and Exchange Server Assessment and review for project impact.
  - a. Testing will occur as appropriate throughout the project and it is a collaborative process between Client Project Team and CCB.
  - b. Verify Certificates
3. Assign user licenses and provision the Office 365 account and users. Assign CCB Technology as Partner of Record (POR) and delegated admin on your Office 365 subscription.
4. Send Client Project Team email with updates.
5. Analyze network bandwidth to ensure migration can be completed by scheduled migration date.
6. Begin Server Sync.
7. Send nightly status reports to Client Project Team and special updates as needed.
8. Track and manage migration status.
9. Send nightly status reports to Client Project Team and special updates as needed.
10. Provide final pre-migration status update to Client Project Team.
11. Perform ongoing Q&A throughout the process.

### Migration Date

1. 4 - 8 hours prior:
  - a. Reminder communication to Client Project Team and end users of the upcoming switch.
  - b. CCB Technology configures local environment AD/DNS/Exchange
2. At migration time: Switch MX record. Mail now flows to your Office 365 account.
3. Final Sync.
4. Sweep Sync.
5. Perform final post-migration Q&A.
6. Send migration completed email to Client Project Team and end users.

## Data migrated

Data/Settings	POP	IMAP	Google	SBS 2003 – 2011	Exchange 2003 – 2016
Email	✓	✓	✓	✓	✓
Calendar	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓
Tasks	✓	✓	✓	✓	✓
Data Journal	✓	✓	✓	✓	✓
Alias/Distribution Group	✓	✓	✓	✓	✓
Public Folders	—	—	—	✓	✓
Public Folder Permissions	—	—	—	✓	✓
Shared Mailbox	—	—	—	✓	✓
Massive Mailboxes (50GB+)	✓	✓	✓	✓	✓
Email Categories	✓	✓	✓	✓	✓
Folder & Calendar Permissions	—	—	—	✓	✓
Mailbox Full Access Permission	—	—	—	—	✓
Meeting Invite Integrity/Status	✓	✓	✓	✓	✓
Outlook Profile	—	—	—	—	—
Re-Attach Add'l Offline PSTs	—	—	—	—	—
Signature Block, Address Autocomplete, Flags	—	—	—	—	—
Rules (In Beta)	—	—	—	—	—
Archive	—	—	—	—	—
✓ = Server Synchronization      ✓ = SkyKick Outlook Assistant      ✓ = SkyKick Exchange Assistant — = Not Migrated					

## Migration Application FAQ

## Office 365 Training Cancellation/Reschedule Policy

If Training is included in this SOW, Village of Caledonia will be subject to the following cancellation/reschedule provisions:

1. If the purchased training is cancelled/rescheduled within 10 business days of the training start date, Village of Caledonia will be subject to 100% of the total training cost.
2. If the purchased training is cancelled/rescheduled greater than 10 business days, but less than 15 business days before the training date, Village of Caledonia will be subject to 50% of the total training cost.
3. If the purchased training is cancelled/rescheduled greater than 15 business day before the training date, Village of Caledonia will be responsible for all reasonable training related costs incurred by CCB Technology,



including, but not limited to: non-refundable travel costs, courseware customization, courseware ordered, products ordered.

## CCB Technology Responsibilities

The following items are considered CCB Technology responsibilities for the project:

- CCB's implementation scope will be limited to the implementation and migration to the Office 365 Exchange Online solution as defined within the deliverables Scope of Work section of the document with exception of the items outlined within the Client scope and responsibilities.

## Client Responsibilities

The following items are considered Client responsibilities for the project:

- Village of Caledonia will organize a project team for the technical and project plan handoff. The project team will have a primary technical contact that will represent Village of Caledonia in the planning discussions and review. The lead contact will participate in all required planning sessions.
- Village of Caledonia will provide access to systems and network connectivity.
- Village of Caledonia will provide information regarding desired system functionality, outside influences, security requirements, and systems management goals.
- Village of Caledonia will be responsible for purchasing additional hardware and licensing for the project if required.
- Village of Caledonia will be responsible for implementing policies after project is completed.
- Village of Caledonia will be responsible for some end user interaction
- Village of Caledonia will be responsible for third party software and hardware configuration to work with Office 365 and SMTP relay if required.
- Village of Caledonia will be responsible for rebooting of servers and restoring connectivity to current services/servers when required.
- Village of Caledonia will be responsible for the build of the Windows Server 2008 R2 64bit or later operating system for Azure Active Directory Connect and/or Active Directory Federation Services (ADFS/Single Sign On) if required
- Village of Caledonia will be responsible for deploying of Outlook and Lync clients as required
- Village of Caledonia will be responsible for configuring Outlook user profiles on client's workstations.
- Village of Caledonia will provide CCB Technology with credentials and access to configure their Firewall for use with Office 365. If Client does not wish to provide CCB Technology these credentials, they will take responsibility of configuring the Firewall to work with Office 365.
- Village of Caledonia will ensure their Exchange server is 2003 with Service pack 2 or later before the migration begins.
- Village of Caledonia will provide all of the required information in the Migration onboarding document provided by CCB. If Village of Caledonia cannot provide all of the requested information CCB will require at least Domain Controller access and may attempt to gather the remaining information as part of an out of scope project billed at an hourly rate.
- Village of Caledonia must provide a credit card number for CCB to keep on file, upon signing this SoW CCB will invoice Village of Caledonia for the project stated within this SoW using their preferred payment method. If the payment method is a Net 30 account and the invoice has not been paid in full after 30 days, CCB will automatically charge the credit card on file for the total invoiced amount.
- Village of Caledonia understands that any Public Folders (Public Calendars, Public Contact Lists, Folders) may be migrated but will be done based on Time and Materials.

## Exchange Online Migration

- Village of Caledonia will be responsible for decommissioning the Exchange server unless otherwise specified in the SoW.
- Village of Caledonia will be responsible for configuring email profiles on clients using a non-Windows computer. (I.e. Apple, Android, Linux, etc.).
- Village of Caledonia will be responsible for configuring Outlook user profiles on clients that do not have Outlook installed directly on their workstation.
- Village of Caledonia understands that to migrate .pst's the .pst's must be on the end user's workstation and Outlook must be connected to the Outlook profile.
- If Village of Caledonia requires an encrypted SMTP relay, Village of Caledonia will be responsible for obtaining and installing a SSL certificate on the SMTP relay server if the SMTP relay server is required to encapsulate all outbound emails in a SSL tunnel to the client's Office 365 tenant. Guidance for certificate requirements is provided by CCB as part of the migration prerequisites informational document. Obtaining and installing a SSL certificate can be a complex process. Support is usually offered by the certificate provider. If client desires support from CCB to obtain and install a correctly formatted SSL certificate, CCB may provide this service at an additional cost to Village of Caledonia that will be based on Time and Materials.
- If Village of Caledonia does not want or cannot allow CCB Technology to complete the DNS changes required for this project, Village of Caledonia understands and agrees that CCB technology will not be responsible for any delays or lost email due to DNS changes.

## Estimated Project Completion Timeframes

- These are the estimated times to complete a migration from the kickoff meeting to the completion of the migration. These are not the timeframes for when CCB Technology can begin a project that timeframe changes based on the quantity of requests that CCB Technology receives.
- These timeframes are estimates and may change based on quantity of users, bandwidth available, unforeseen issues in client's environment.
  - o Cutover Migration (Exchange, Gmail): 2-4 weeks

## Engagement Resources

The following are contacts at Village of Caledonia that will work with the CCB Technology team on your project:

Name	Phone	Email
Raquel Villarreal	262-636-3976	<a href="mailto:raquel.villarreal@racinecounty.com">raquel.villarreal@racinecounty.com</a>

## Fee Schedule

This engagement will be conducted on a time & materials & fixed cost basis. The total value for the Services pursuant to this SOW shall not exceed the amount outline in the [Project Estimate](#) unless otherwise agreed to by both parties via the [project change control procedure](#), as outlined within. A Project Change Request (PCR) will be issued specifying the amended value.

Village of Caledonia agrees that any additional work outside the scope of work or additional work required due to meet minimum requirements to begin and/or complete work will be billed out based on the fee schedule below.



Role/Function	Engagement	Fee Type	Hourly Rate
CCB Technology Remote Engineer	Normal Hours	Hourly	\$175
CCB Technology Remote Engineer	After Hours	Hourly	\$175
CCB Technology Remote Engineer	Weekend/Holiday	Hourly	\$250
CCB Technology On-Site Engineer	After Hours	Hourly	\$250
CCB Technology On-Site Engineer	Weekend/Holiday	Hourly	\$300

CCB Technology's normal business hours are 8:30am-5:00pm CST M-F, excluding company holidays  
PLEASE NOTE: This pricing can change based on a variety of factors at the time of the request

### Additional Fees

- Village of Caledonia agrees to pay any travel expenses for onsite work required to complete this project.
  - o CCB Technology will notify Village of Caledonia prior to deploying an engineer onsite.
  - o Fees may include but are not limited to mileage (rates are specified by the IRS Standard Mileage Rate for the time-period that the work was performed), hotels, meals, and parking.

### Completion Criteria

CCB Technology shall have fulfilled its obligations when any one of the following first occurs:

- CCB Technology accomplishes the activities described within this SOW, including delivery to Client of the materials listed in the Section entitled "Scope of Work," and Client accepts such activities and materials without unreasonable objections. No response from Client within two-business days of items included in scope of work section being delivered is deemed acceptance.
- CCB Technology and/or Client has the right to cancel services or items included in scope of work section, not yet provided within 15 calendar days, with written notice to the other party. Client acknowledges that they will be billed for any work performed up to time of contract termination.
- CCB reserves the right to terminate the project if the client is non-responsive for a period of 15 calendar days or greater. Client acknowledges that they will be required to pay for the project work completed up to that point.

The project is complete when the following takes place.

- Discovered mailboxes are migrated to Exchange Online
- Incoming email is being received in Exchange Online accounts
- Exchange Online email accounts are able to send email
- There are no undesirable email rejections occurring.

### Assumptions

This Statement of Work is based upon the following assumptions and client responsibilities:

- Village of Caledonia will identify one person with overall responsibility for the project. This person will act as the primary contact for CCB Technology and will have decision making authority regarding management of the project. Village of Caledonia will promptly notify CCB Technology of any change in the person Village of Caledonia has designated to serve as the Project Manager.

## Exchange Online Migration

- Appropriate management, technical staff, and other internal resources as necessary and/or required to assist in completing the Scope of Work described. This assumes that a reasonable effort will be made to provide the necessary introductions and ensure the proper cooperation from within Village of Caledonia.
- Village of Caledonia will make all necessary facilities, hardware, and software available to CCB Technology at the commencement of the project.
- All “out of scope” requests will follow the documented change control process.
- Information provided by Village of Caledonia is correct and complete.
- Village of Caledonia will provide reasonable responses to questions and responses to requests for approval within 24 hours.

## Out of Scope

- The remediation of network devices (routes and switches)
- The remediation of current mail & Active Directory infrastructure
- Configuration of 3<sup>rd</sup> party applications and devices connecting to Exchange Online
- Deploying of Teams and Outlook clients
- Design and deployment of SharePoint and OneDrive services
- Decommission Exchange Server after Migration
- Remediation or migration of Domain/DNS
- Any area that is not explicitly listed in the [Scope of Work](#) is out of scope for this engagement
- Setup Default DLP Template (HIPAA, PCI)
- Onsite Engineer for Outlook Profile or Mobile device email configuration
- Setup Active Directory Federation
- Full Day Office 365 End user Training for 16 Students\*
  - o *Training will be setup as a separate project within CCB Technology's internal tools. Completion of the migration portion of the project, including billing, is not contingent upon the training being conducted.*
- Full Day Office 365 Admin Training for 16 Students\*
  - o *Training will be setup as a separate project within CCB Technology's internal tools. Completion of the migration portion of the project, including billing, is not contingent upon the training being conducted.*

## Risks

The following are the known risks for the engagement:

- Insufficient existing documentation or information
- Insufficient bandwidth to support Office 365 services (refer to [Office 365 Bandwidth Guidelines](#) for more info)
- Insufficient communication and commitment by project team
- Use of Clients and Applications not supported by Office 365 (refer to [Office 365 Software Requirements](#) for more info)
- Any changes to existing environment while migration is in process will negatively impact the project. Please make certain to inform CCB Technology regarding any changes so that we may adjust the project plan accordingly
- On-premises mailbox permissions such as Send As, Receive As, and Full Access that are explicitly applied on the mailbox are migrated to Exchange Online. Inherited (non explicit) mailbox permissions and any permissions on non-mailbox objects—such as distribution lists or a mail-enabled user—are not migrated. Therefore, you have to plan for configuring these permissions in Exchange Online if applicable for your organization. For example, you can use the Add-RecipientPermission and Add-MailboxPermission Windows PowerShell cmdlets to set the permissions in Office 365.



## Exchange Online Migration

- We do not support cross-premises permission scenarios. Permissions are only migrated and functional when implementing an Exchange hybrid deployment if there are corresponding directory objects in Exchange Online. Additionally, all objects with special permissions such as Send As, Receive As and Full Access must be migrated at the same time. This also means that to migrate these permissions, you must make sure Azure Active Directory Connect has completed before you start moving mailboxes.
- If your organization implements multiple on-premises Exchange organizations, Exchange hybrid deployments aren't currently supported.

## Migration Tool

Client understands that CCB Technology will be using a 3<sup>rd</sup> party migration tool to complete this migration. This SOW was constructed to include the cost of the best migration tool chosen for this project. If the migration tool experiences unforeseen technical difficulties, CCB Technology cannot be responsible for delays to this project while the migration tool is remediated by the software manufacturer. CCB Technology will inform client of any delays resulting from the migration tool, and will provide an alternative tool option for the client to consider. If Client approves the use of an alternative migration tool, the Client will be responsible for any additional costs associated with the alternative migration tool.

## Project Change Control Procedure

The following process will be followed if a change to this SOW is required:

- A PCR will be the vehicle for communicating change. The PCR must describe the change, the rationale for the change, and the effect the change will have on the project.
- The designated Project Manager of the requesting party (CCB Technology or Client) will review the proposed change and determine whether to submit the request to the other party.
- Both Project Managers will review the proposed change and approve it for further investigation or reject it. CCB Technology and Village of Caledonia will mutually agree upon any charges for such investigation, if any. If the investigation is authorized, the Client Project Managers will sign the PCR, which will constitute approval for the investigation charges. CCB Technology will invoice Village of Caledonia for any such charges. The investigation will determine the effect that the implementation of the PCR will have on SOW price, schedule and other terms and conditions of the Agreement.
- Upon completion of the investigation, both parties will review the impact of the proposed change and, if mutually agreed, a Change Authorization will be executed.
- A written Change Authorization and/or PCR must be signed by both parties to authorize implementation of the investigated changes.
- The Project Management system will be updated by CCB Technology to reflect changes to the project plan.

## Accepted and Agreed to:

This statement of work, including attachments, schedules, addenda, and supplemental documents has been submitted by CCB Technology, a Wisconsin corporation (CCB) to Village of Caledonia and shall be a binding agreement between CCB Technology and Village of Caledonia at such time as it has been signed on behalf of both CCB Technology and Village of Caledonia. As of the effective date the parties agree as follows:

1. **Services.** CCB Technology agrees to perform services and provide documentation described in this statement of work, and Village of Caledonia agrees to the provisions of this statement of work.

2. **Adoption of Professional Service Agreement.** The professional services agreement between CCB Technology and Village of Caledonia is incorporated by reference, provided that (a) the provisions of this statement of work shall control if the provisions of the agreement conflict with the provisions of this statement of work and (b) hourly rates set forth in this statement of work apply to the services described in this statement of work, and CCB Technology's current hourly rates apply to other services provided by CCB Technology. This agreement constitutes the entire agreement of the parties, supersedes any prior understandings relating to the subject matter hereof, and may be amended or supplemented only in a written agreement signed by CCB Technology and Village of Caledonia. All printed clauses on any order form submitted by Village of Caledonia are deemed deleted.

**IN WITNESS WHEREOF**, the parties hereto have caused this SOW to be effective as of the day, month and year first written above.

Village of Caledonia

CCB Technology

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_



## Exchange Online Migration

### Appendix B: Domain names to be migrated

- caledonia-wi.gov (Wants to make this the primary mail-enabled domain)
- caledoniawi.com
- caledoniawifd.com
- caledoniawipd.com
- calmpjhealth.com



CDW Government, LLC  
Microsoft Enterprise 6.6 Agreement Pricing

Date: 10/3/19  
Account Manager: Amanda Fischer

**Enterprise Quote  
for**

VLS Specialist: Pat McCormack  
Channel Price Sheet Month: Oct-19

**Village of Caledonia**

Unless otherwise noted, All Quotes expire upon current month's end

**Annual Payment**  
Customer to make three annual payments to CDW-G

Microsoft Part #	Description	Level	Quantity	Year 1		Year 2		Year 3		
				Price	Extended	Price	Extended	Price	Extended	
AAA-11894	O365GCCCE3 ShrdSvr ALING SubsVL MVL PerUsr	D	24	\$ 229.15	\$ 5,499.60	\$ 229.15	\$ 5,499.60	\$ 229.15	\$ 5,499.60	
U4S-00002	O365GCCCE1 ShrdSvr ALING SubsVL MVL PerUsr	D	82	\$ 83.07	\$ 6,811.74	\$ 83.07	\$ 6,811.74	\$ 83.07	\$ 6,811.74	
<b>Year 1 Total</b>				<b>\$ 12,311.34</b>	<b>Year 2 Total</b>				<b>\$ 12,311.34</b>	
<b>Three Year Total</b>				<b>\$ 36,934.02</b>		<b>Year 3 Total</b>				<b>\$ 12,311.34</b>

**Notes**

**Terms & Conditions**

Terms and Conditions of sales and services projects are governed by the terms at:  
<http://www.cdw.com/content/terms-conditions/product-sales.aspx>