

Microsoft 365 Release 3 (M365 R3)

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## PROJECT CHARTER



*Washington's Consolidated Technology Services Agency*



VERSION HISTORY		
Date	Modification	Modifier
6/1/20	Initial Draft – v0.1	Carrie Gonzalez, Project Manager
6/5/20	Final Draft – v1.0	Carrie Gonzalez, Project Manager

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PROJECT INFORMATION	
Project Title	<b>MICROSOFT 365 RELEASE 3 (M365 R3)</b>
Request Date	6/1/2020
Executive Sponsor	Mark Quimby, Deputy Director, Technology & Operations
Business Sponsor	Scott Barringer, Assistant Director, Computing Services
Functional Manager	Angie Ragan, Cloud Services Manager, Computing Services
Project Manager	Carrie Gonzalez, Senior Project Manager, Transformation Office

### Project Description

Washington Technology Solutions (WaTech) has created a Microsoft 365 (M365) ecosystem of cloud-based services and features, including an Office 365 (O365) enterprise shared tenant, to meet the state of Washington's changing business needs. The M365 R3 Project would continue to enhance the larger M365 ecosystem, including the O365 shared tenant, to enable secure services and features for state agencies utilizing the environment, and provide customers with documentation regarding the environment as it pertains to the state's unique federation.

### Background and Business Drivers

#### WaTech Vision: Trusted leader and technology partner of choice

#### Guiding Principles

- Customer focused
  - Listen to all feedback and act decisively to make improvements.
  - Communicate consistently with purpose and clarity.
- Lead with integrity
  - Foster trust by demonstrating transparency, accountability and sound financial stewardship.
  - Accept responsibility and ownership for actions and results.
  - Engage stakeholders to pursue key solution trends in technology.
- People First
  - Champion a culture of creativity, innovation and continual learning.

#### WaTech Mission: Advancing Washington's technology strategies and services

#### Guiding Principles

- Deliver quality solutions
  - Provide technology solutions that are secure, resilient and sustainable.
  - Lead statewide strategy, policy and architecture.

- Leverage economies of scale to reduce cost.
- Deliver seamless operations through collaboration and communication.
- Support agency technology project delivery.
  
- Service driven
  - Be reliable, responsible and predictable.
  - Deliver on our commitments to meet our customer's needs.
  - Communicate regularly and clearly about changes, enhancements and options.

In 2016, the Office of the Chief Information Officer (OCIO) published an [Enterprise Business Processes for Internal Identity Management Policy](#) (also referred to as the OCIO EAD & O365 Tenant Policy) establishing specific state Active Directory (AD) and O365 tenancy and enterprise business processes. The policy states that WaTech shall:

- Manage the State's internal identity management solution, the EAD, to accomplish single sign-on.
- Manage the State Forest within the EAD.
- Manage the federation to the EAD.
- Manage the delegations within shared/central services, such as email.
- Maintain security boundaries within agencies.
- Administer the enterprise tenant account within Office O365.

On March 27, 2019, WaTech chartered a project to prepare the state for use of an O365 enterprise shared tenant environment. The O365 Shared Tenant Enterprise Service project's goal was to establish a tenant to which agencies in the state's EAD could migrate users to consume Software-as-a-Service (SaaS) services and features, specifically Exchange Online, Skype for Business Online, One Drive for Business, and SharePoint Online.

On September 30, 2019, WaTech opened its doors for agencies to begin onboarding to the O365 enterprise shared tenant; the environment will need continued enhancements, added functionality, and documentation in the larger M365 ecosystem to support additional services and features.

To continue to add value to the environment, WaTech chartered an M365 Release 2 (M365 R2) project in November 2019, to enhance the shared tenant with Intune and Teams services, and provide additional documentation for available features and services; R2 concluded in May 2020.

## Project Vision and Scope

The M365 R3 Project will provide state agencies in the State EAD forest with clear documentation of O365 and M365 services and features as they pertain to Washington state's federation, and business cases to aid in state strategic planning. The scope of the M365 Project is as follows:

### Included

#### Launch of New Features and Services:

- PBX Summary (including differentiation of PBX vs. Teams and potential costs/benefits).
- Power Platform Admin Guide.

#### Enhancements to Shared Tenant:

- Records Retention Admin Guide.
- Onboarding Guide.
  - Exchange.
  - Vault.
  - IronPort considerations for migration.
  - General onboarding.
- Maintenance & Operations Plan v3.0
  - Admin Guides Updates (identification of frequency and responsible party).
  - Single repository for scripts.

#### Strategy Decisions and Enablement:

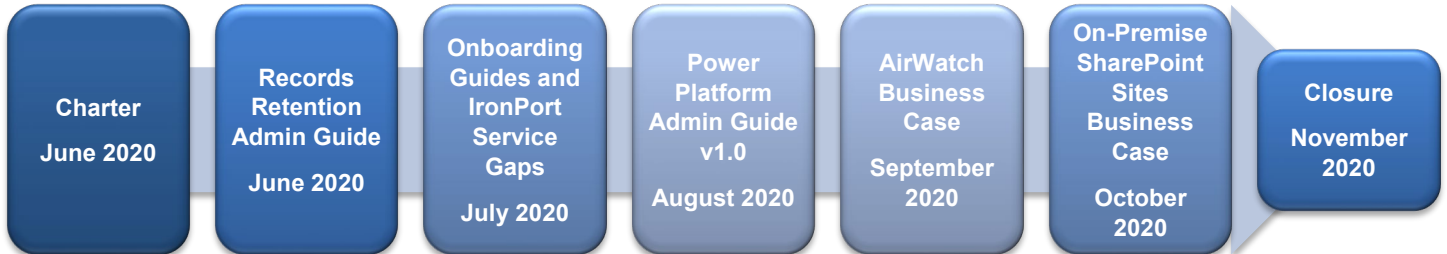
- IronPort Service Gaps.
- Evergreen description of services.
- User Synchronization Status Communication (including current status and reiteration shared tenant "Big Five" prerequisites).
- AirWatch Business Case.
- On-Premise SharePoint Business Case.
- Recommendations for Release 4.

### Excluded

- Agencies' O365 shared tenant and M365 consultations and readiness engagements.
- Agencies' migration to O365 shared tenant and M365 services and features.
- Services Roadmap (scoped to a separate program charter).

## Timeline

The estimated high-level timeline for the M365 R3 Project is anticipated to last through November 2020. Dates illustrated below are targeted milestones for publishing documentation through the Cloud Enablement Advisory Committee (CEAC):



## Budget

The projected costs for the M365 R3 Project are all in-kind for staffing resources and are subject to change through project planning as the baseline is established and approved. Initially, at a high level, the budget is as follows:

PROJECT RESOURCES	COUNT	FY20
SENIOR PROJECT MANAGER	1	\$ 25,157.58
BUSINESS ANALYST	1	\$ 8,656.42
CLOUD SERVICES MANAGER	1	\$ 27,017.76
AD AUTOMATION MIGRATION SME	2	\$ 27,771.12
MESSAGING SYSTEMS ADMINISTRATOR	2	\$ 24,355.20
TECHNICAL ACCOUNT MANAGER	1	\$ 11,314.33
SYSTEMS INTEG ENTERPRISE SME	4	\$ 83,505.31
EXECUTIVE SPONSOR	1	\$ 4,572.28
BUSINESS SPONSOR	1	\$ 3,965.46
TECHNICAL WRITER (CONTRACTOR)	1	\$ 5,168.00 (8.8% tax)
TOTAL IN-KIND COSTS		\$221,483.46
CONTINGENCY (15%)		\$ 33,222.52
<b>PROJECT TOTAL</b>		<b>\$254,705.98</b>

## **Risks, Constraints and Assumptions**

The M365 R3 Project has the following risks, constraints and assumptions:

### **Risks**

- Competing agency and enterprise priorities, timelines and levels of cooperation may impact the project.

### **Constraints**

- Resources needed for the project are also needed on other simultaneous projects, including emergency response for COVID-19.
- EOL timeline for IronPort decommissioning is June 2021, and EOS is November 2021, so early strategy for service gaps for agencies that have not yet migrated to the shared tenant by November 2021 will be a key component of ensuring enterprise business continuity.

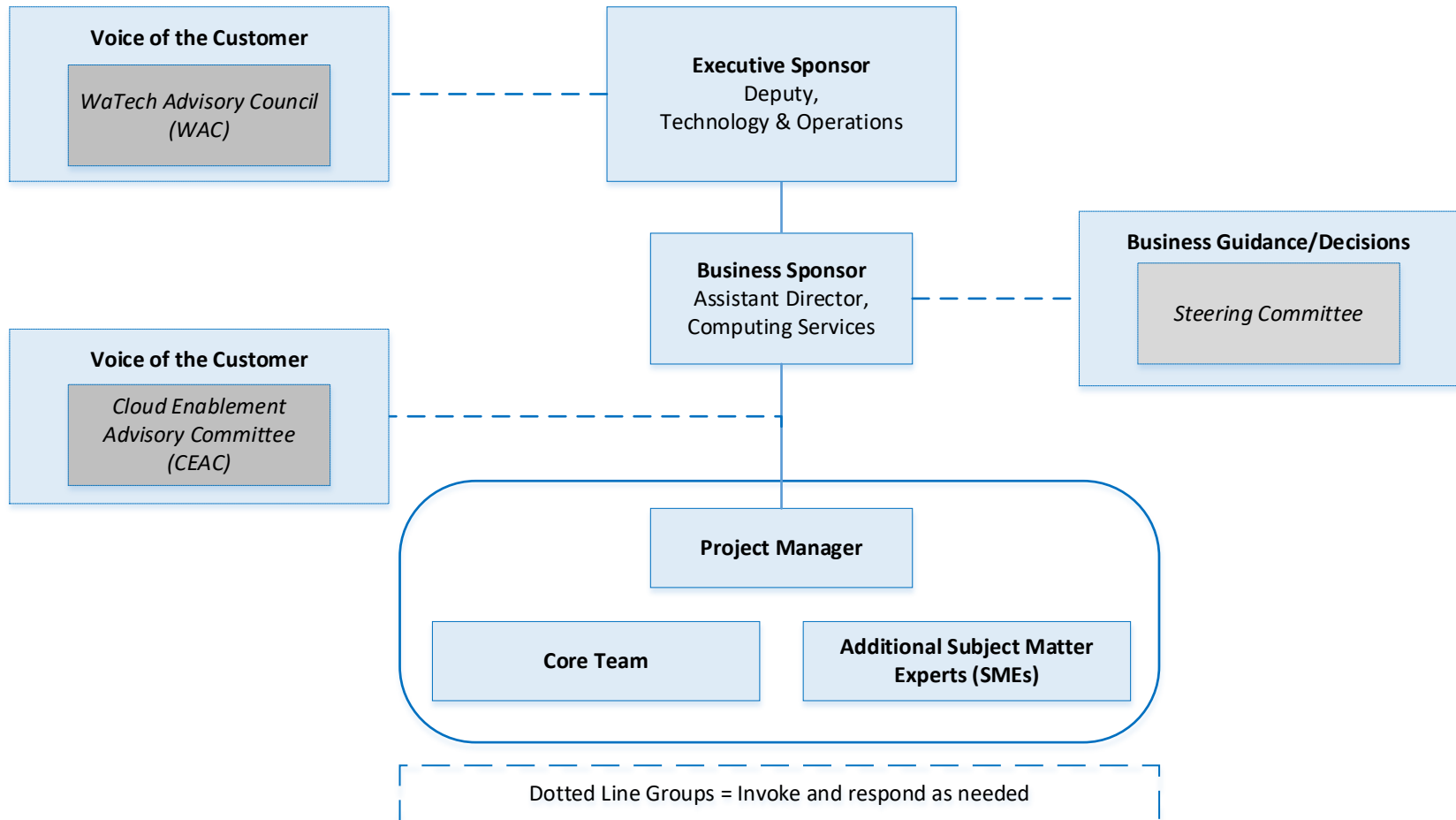
### **Assumptions**

- The M365 R3 Project will not require any new hardware, software or equipment purchases.



Project Governance

### M365 R3 Project Governance



## Project Charter Sign Off

*I am in consensus with this program charter and agree to assist in the implementation of the project plan*

Name	Title/Role	Signature	Date
Mark Quimby	Deputy, Technology & Operations/Executive Sponsor		
Scott Barringer	Assistant Director, Computing Services/Business Sponsor		