



BOARD OF SUPERVISORS  
AGENDA LETTER

Agenda Number:

Clerk of the Board of Supervisors  
105 E. Anapamu Street, Suite 407  
Santa Barbara, CA 93101  
(805) 568-2240

**Department Name:** Information Technology  
**Department No.:** 067  
**For Agenda Of:** July 11, 2023  
**Placement:** Administrative  
**Estimated Time:**  
**Continued Item:** No  
**If Yes, date from:**  
**Vote Required:** Majority

---

**TO:** Board of Supervisors  
**FROM:** Information Technology  
Contact Info: Chris Chirgwin, CIO (805) 568-2606  
Andre Monostori, Deputy CIO (805) 568-2608

**SUBJECT:** **Second Amendment to the Agreement for Professional Services of Independent Contractor with Smartsheet, Inc., for Software Services; All Districts.**

---

**County Counsel Concurrence**

As to form: Yes

Other Concurrence: Risk Management

As to form: Yes

**Auditor-Controller Concurrence**

As to form: Yes

**Recommended Actions:**

That the Board of Supervisors:

- a) Approve, ratify, and authorize the Chair to execute a Second Amendment to the Agreement for Services of Independent Contract under the County's Master Subscription Agreement (Agreement) with Smartsheet, Inc., originally executed on 8/24/2021 (BC21126), to provide software services for the fiscal year 2023-2024 in the amount not to exceed \$358,650.04; and
- b) Approve and authorize the Chief Information Officer or their designee to order additional software services and licenses in an amount not to exceed 10% of the contract amount, or \$35,865.00; and
- c) Determine that the above recommended action is a government funding mechanism or other government fiscal activity, which does not involve any commitment to any specific project that may result in a potentially significant physical impact on the environment and is therefore not a project under the California Environmental Quality Act (CEQA) pursuant to section 15378(b)(4) of the CEQA Guidelines.

**Summary Text:**

The County of Santa Barbara has worked to improve business productivity through the modernization of office information technology through the implementation of the Smartsheet platform. Smartsheet is a cloud-based platform where anyone can create the solution they need, backed by the control and security IT requires. This solution can scale from a single project to end-to-end work management without code. Three years ago, Smartsheet accounts were purchased by three departments separately and found to be an invaluable tool to improving efficiency and tracking across departments, such as Public Health, Behavioral Wellness, and General Services Administration, Finance, Purchasing, and Information and Communication Technology divisions. An account consolidation to a single, Countywide instance took place to reduce cost and administrative overhead. The combined costs of the Countywide Smartsheet platform necessitated submitting a board contract for continued usage and increased scalability.

**Background:**

The Smartsheet platform is a strategic investment in the County's information technology services. This project directly aligns with the Renew initiative in line with the migration of on-premise services to the cloud while concurrently achieving software standardization. Similarly, the project is also strongly aligned with the Countywide Technology Strategic Plan in that it is an investment in modernizing technology and improving accessibility.

This project will also facilitate the management of County projects through additional governance capabilities that include project management, process tracking, dashboards, and reporting. This platform will reduce risk to the County through increased visibility into large and important projects; and allow for more efficient reporting for high-level executives. An example of Smartsheet's value is the tracking of COVID-19 related efforts including, available beds, cases, and other items through the Public Health Department. This data improved the efficiency of the support teams and allowed for greater visibility to leadership and the public with accurate and timely data. Another example of providing increased visibility using Smartsheets is the addition of the Local Vendor dashboard to the Purchasing website, to track program participation and inform outreach efforts.

In collaboration with the Department of Behavioral Wellness and the Public Health Department, the Information Technology Department (formally a division of the General Services Department) has worked to create a Project Management solution to support large technology projects. This solution along with project tracking has enabled departments to support several simultaneous projects in efforts to advance technology across the county.

**Key Contract Risks**

The contract is negotiated based on continued usage of the current Countywide Smartsheet account, with the possibility of implementing additional product offerings if agreed upon by multiple governing departments. All purchasing oversight of these product offerings is to be governed by the departments to mitigate unnecessary spending.

**Fiscal and Facilities Impacts:**

Budgeted: Yes

**Fiscal Analysis:** ["Double Click to see Funding Source Instructions"](#)

<b>Funding Sources</b>	<b>FY 2023-24</b>	<b>Total Cost</b>
ITD Internal Service Fund 1915	358,650.04	358,650.04
<b>Total</b>	<b>\$358,650.04</b>	<b>\$358,650.04</b>

Narrative: Funding to cover the cost is included in the Internal Service Fund (ISF) rates charged to users in the approved FY 2023-2024 Information Technology Fund 1915 budget based on each department's commitment to the service and the projected cost for additional services and support.

**Attachments:**

1. Amendment No. 2 to Smartsheet Agreement

**Authored by:**

Mark Garcia, Project Portfolio Manager, General Services, ITD

**cc:**