



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:** General Services  
**Department No.:** 063  
**For Agenda Of:** June 28, 2022  
**Placement:** Administrative  
**Estimated Time:**  
**Continued Item:** No  
**If Yes, date from:**  
**Vote Required:** Majority

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**TO:** Board of Supervisors  
**FROM:** General Services      Janette D. Pell, Director (805) 560-1011  
Contact Info:                    Andre Monostori, Assistant Director (805) 568-2606

**SUBJECT:**      Agreement with Smartsheet, Inc., for Software Services

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**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 General Services Director or designee to execute an Addendum under the County's Master Subscription Agreement with Smartsheet, Inc originally executed on 8/24/2021 (Board Contract Number BC21126) to provide software services for the fiscal year 2022-2023 in the amount not to exceed \$299,595.00 (Attachment 1); and
- b) Authorize the General Services Director, until otherwise ordered by the Board, to order additional software services and increase the contract amount as needed to an amount not to exceed \$369,595.00; and
- c) Determine that the above actions are not a project under the California Environmental Quality Act (CEQA) pursuant to Section 15378(b)(5) of the CEQA guidelines because they consist of administrative activities of government that will not result in direct or indirect physical changes in the environment.

**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. Two 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.

The General Services, ICT division, in collaboration with the Department of Behavioral Wellness and the Public Health Department, have worked together to create a Project Management solution to support large technology projects. A business case is drafted for the Standards Committee presenting Smartsheet as the standard for Countywide Project Management.

**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:**

<u>Funding Sources</u>	<u>Description</u>	<u>FY 2022-23</u>
Department Users	Smartsheet Contract	\$299,595.00
Department Users	Additional Estimated Services	\$70,000.00
<b>Total</b>		<b>\$369,595.00</b>

Narrative: The contract covers the current, licensed user count and products the County has purchased. Along with the listed founding departments (Public Health, Behavioral Wellness, and General Services), more than ten other departments purchased licenses to build out Smartsheet solutions for their departments and Countywide use. Therefore, forecasting the purchase of additional licensing and training over the next fiscal year is warranted. Currently, the founding departments are working with Human Resources to research use cases and will likely expand Countywide usage over the current fiscal year. The projected costs for these additional services are \$70,000.00.

**Attachments:**

1. Amendment No. 1 to Smartsheet Agreement
2. Smartsheet Order Form
3. Smartsheet Agreement 08.24.2021

**Authored by:**

Mark Garcia, Project Portfolio Manager, General Services, ICT

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