

M365 OneDrive Migration

Kentucky Housing Corporation

Management Innovation: Technology

HFA Staff Contact

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Summary

As part of the Corporation's long-term plan to migrate to the Microsoft 365 cloud-powered productivity platform, our staff data and user licensing needed to be migrated from an on-site model to Microsoft's cloud subscription model with the first phase of this process involving a move from on-site Exchange email servers to Exchange Online and the most recent phase to migrate staff non-shared data to OneDrive for Business. Through a comprehensive training and communications plan, coupled with one-on-one "white glove" migrations, we succeeded in migrating to OneDrive over 320 staff members and their non-shared data with a 97.05% staff satisfaction rate.

Problem

Starting in 2018, Kentucky Housing Corporation (KHC) made the strategic decision to begin migration of on-site staff email accounts to Microsoft's Office 365 (now Microsoft 365 or M365). The first attempt at migration was completed with mixed results, but the second part of the migration to M365 over the last year was an overwhelming success. In the near five-year gap between phase one and two of account migrations, KHC learned a lot about change management and crafting a training and communication plan that led to a staff rating of 4.85 out of 5 stars for the "white glove" approach to the migration.

Phase 1 and Lessons Learned

- Staff need repeated announcements in a two-to-four-week period before any largescale change.
Managers need to be informed first and have time to work with IT on any times that will not work if there is potential downtime for staff.
- Stagger departments and staff within departments in case of potential downtime.
- Provide staff training before a change.

Phase 2 Commences

Discovery

The issue going into the migration to OneDrive was the size of many staff home drives on KHC's server. During discovery we found that 28% of staff had files exceeding 1 GB. With nearly all KHC's staff being remote at least part of the time, we knew that internet speed and ability to connect (and stay connected) to KHC's VPN (the secure connection needed to access these staff files) was a limiting factor compounding on limited IT staff available to assist with migrations. During discovery different methods of pushing out policies to covertly copy files failed to work in a way that guaranteed success; additionally, it was discovered that many older user accounts had issues within their group and machine policies that conflicted with automated methods but frankly needed to be addressed on a case-by-case basis prior to migration anyway.

Prosci Change Triangle (PCT) and Risk Assessments were conducted and determined that while this was a complex change for KHC's IT team, the end user would see this as a minor change in the end. Those that didn't use the home drive wouldn't utilize the OneDrive application; no change for them. Those that used the home drive would see extra capabilities they were currently lacking - including multi-user editing, access to files from any KHC or personal device, sharing personal files with other staff, and no need to connect to VPN for use –

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further supporting KHC's future M365 implementation and the decentralized work environment. The biggest task would be to make sure that users were aware of OneDrive's capabilities through trainings and on-boarding while communicating changes well in advance to both teams and individuals.

Communications and Training Plan

It was determined that KHC's IT team would do a rolling department-by-department, and group-by-group within departments, one-on-one migration supported by pre-made communications and trainings. We focused communications on internal staff only, there would be no downtime for external partners or customers during migration, and segmented staff messages into the following channels:

- Leadership Team – KHC's monthly meeting for managing and executive directors.
- Departmental Heads – Emails and one-on-ones with managers for departments preparing to migrate.
- NewsBrief Messages – Articles in KHC's bi-weekly newsletter to all staff.
- One-on-One Migrations – Direct emails and meetings with individual staff migrating from their home drive to OneDrive.

Since we had determined via a pilot program (sampling users across departments and testing migration processes) that a large portion of staff would be using OneDrive in the same way that they currently used the home drive, we created an optional two-part training course explaining the migration process, how to use the "Connect to VPN before Login" feature, and overall features of OneDrive. We didn't want to create a long training that most staff wouldn't remember, so the essential parts took up a combined six minutes. We leveraged KHC's training software Brainstorm to create the custom course.

With limited IT staff, the key for all this was creating a unified campaign with every message looking the same (colors, graphics, calls-to-action) and leveraging pre-made templates and trainings. Taking some of the mental grunt-work out of interactions with staff freed IT to do the migrations. IT would send an email with expectations of staff (even having different templates for staff that would be on-site and eligible for an expedited process) with links to the training and then send meeting requests (also a template) with key points highlighted. Additional email templates for day-before, day-of, and after migration were utilized. All could be prescheduled days or weeks in advance as migration schedules were being set. IT staff could batch schedule these while creating ticket task templates within their ticketing software and begin the backend preparations for migration within Active Directory (AD) user groups, computer groups, and Group Policy Objects (GPOs).

Results

Over the course of the year the six-month migration schedule expanded, and staffing changes and resource re-allocation occurred. It took a year to finish every migration, but 90 percent were completed with nine months. The benefit of relying on templates and having regimented communications was that new IT staff picking up migrations had a pre-existing framework to operate within. They just had a task list for each migration, a large portion of which was automated via their ticketing system.

The process necessitated the one-on-one "white glove" approach, but the slower process was a blessing in the end. It gave IT a chance to clean up old policies and fix user profiles before migration, staff didn't feel rushed into the change, those that utilized the collaborative features of

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OneDrive were given concrete usage cases with training, and any downtime was mitigated by ensuring that teams were consulted throughout the project and migration process.

Through a satisfaction survey sent after each migration completion, KHC's IT team received outstanding marks for staff satisfaction. As mentioned before, staff overall rated the migration with an average of 4.85 out of 5 stars. We split the survey into the pilot and general groups; the general group averaged 4.85 while the pilot was 4.88. Focusing just on the general group, an overwhelming 90% had no issues with the migration process, those that did had to do repeated computer restarts because of policy/profile issues that were corrected in the one-on-one meetings with IT. More than 70% of respondents found both the one-on-one meetings and emails from IT extremely helpful and the more the 25% found the NewsBrief articles and training videos extremely helpful. **More than 70% of staff found all four to be either very or extremely helpful. 100% found the meetings very or extremely helpful and 95% for the emails.**

Replicability

Looking at the survey results and anecdotal comments from staff and management throughout the process, phase 2 of KHC's migration to M365 was huge success! We leveraged existing software and resources as best as possible, while considering lessons from phase 1 to craft a process that staff appreciated.

Nothing that we did couldn't be done elsewhere or faster than we did it. IT's ticketing software automated certain aspects but leveraging templates made for consistent communication. Thinking about end goals and working backward to create a framework for both this project's manager and the staff working on the migration ensured that everyone was informed throughout the process at all levels and issues could be worked out before any miscommunication with line level staff.

Doing a phased program to determine the final process saved a lot of headaches up front and allowed us to A/B test communications. Having the pilot consist of different users at different skill levels and locations (onsite vs remote vs internet speed overall) allowed us to correct large problems beforehand (like we'd seen with mass migration) and even create differing on-site and remote procedures for staff.

The takeaway is look at potential risks (size of change vs need/readiness for change) and the capacity for change. At KHC we use the Prosci "ADKAR" model to assess readiness and plan for change management, but the key is thinking of the awareness/desire to change, the knowledge/ability to change, and the ability to reinforce the change through policy, training, etc.

Looking at your own project timeline and involving your staff across levels and departments to craft plans for organization-wide changes is a recipe for success. You can pinpoint potential pain points and craft processes that meet the needs of those working on and affected by the project. Communicating the needs and outcomes beforehand and during the project are key; if possible, brand your project so that immediately, staff know what pieces correlate with what. Communicate early and communicate often; it's said that a person needs to read something five to seven times before remembering it, each time you can provide important details is an opportunity for that information to stick.

Leveraging the tools we had, automating process where we could, and getting buy-in throughout the project led to success.

References

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- Communications Plan - <https://kyhousinggov.sharepoint.com/:x/t/Team-M365CollaborationServicesProject/EToE7IbVWRBLsq4NutvJFjkBt7fOuHkwV9DSAQtB MI805Q?e=iqdiEN>
- Abbreviated Training Playlist - <https://www.youtube.com/watch?v=2GbRLThd8Ac&list=PLe9LTtgvpB4EoPySCSHx-h86GQi51YWAc&pp=gAQBiAQB>
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 - General Staff - https://www.surveymonkey.com/stories/SM-a1GfXOFg_2BvQmaNg1mM6Leg_3D_3D/
 - Project Close Out Meeting PowerPoint Slide Deck
 - PDF Version: https://kyhousinggov.sharepoint.com/:b/r/teams/Team-M365CollaborationServicesProject/Shared%20Documents/General/2024_0423-M365CollaborationServicesPhase1ProjectCloseOutMeetingSlides.pdf?csf=1&web=1&e=L4CLvR
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 -
 - Project Close Out Document
 - PDF Version: <https://kyhousinggov.sharepoint.com/:b/r/teams/Team-M365CollaborationServicesProject/Shared%20Documents/General/M365CollaborationServicesPhase1-ProjectCloseOut%20-%20signed.pdf?csf=1&web=1&e=0FQMz6>
 - Word Version: <https://kyhousinggov.sharepoint.com/:w/r/teams/Team-M365CollaborationServicesProject/Shared%20Documents/General/Archived/M365CollaborationServicesPhase1-ProjectCloseOut.docx?d=wbbb065f2a3cf4ba1a7f810f96319e4a5&csf=1&web=1&e=bSoG0I>
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- NewsBrief Articles

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- Project Announcement – March 30, 2023 -
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- Features Promo – April 20, 2023 -
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- Migration Update – June 1, 2023 -
http://iwebapps.kyhousing.org/apps/KHC_Newsbrief/public/Default.aspx?iid=5307
- What is Brainstorm? - <https://www.brainstorminc.com/>
- 5-to-7 Content Rule - <https://www.thinklikeapublisher.com/master-the-rule-of-5-7-make-your-content-stick/#:~:text=Understanding%20the%20magic%20of%20the,term%20to%20long%2Dterm%20memory>
- [What is Prosci/ADKAR?](#)

Corporate Project Close Out



Project: M365 Collaboration Services Phase I
Date: 4/23/2024
Prepared
By: Keith Lilly

| Project Info | |
|---------------------|--|
| Business Objective: | To provide Microsoft 365 (M365) collaboration services for KHC business unit programs, KHC needs to configure their existing M365 collaboration services OneDrive for Business, Microsoft Teams, and SharePoint Online as well as migrate KHC staff members' existing Documents folder to M365 OneDrive. |
| | |

| Project Team | | | | |
|--------------|--|--|--|--|
|--------------|--|--|--|--|

| Role | Name | Title | Email | Department |
|---|--------------------------------------|---|--|----------------------------|
| Business Executive Sponsor/Procurement Officer | Jon Davidson | Deputy Executive Director Business Services | jdavidson@kyhousing.org | Executive Directors Office |
| IT Executive Sponsor/Signature Authority/Procurement | David Carroll (Replaced Joe Sanders) | Managing Director Information Technology | dcarroll@kyhousing.org | Technology Services |
| Project Manager | Keith Lilly | IT Infrastructure Project Manager | klilly@kyhousing.org | Technology Services |
| Operations Manager | Bryan Williams | Technology Services Operations Manager | bwilliams@kyhousing.org | Technology Services |
| Primary M365 Administrator and Technical Lead (Replaced Terry Anderson) | Charles "Scott" Sullivan | Network Engineer | csullivan@kyhousing.org | Technology Services |
| Secondary M365 Administrator and Technical Lead (Sandy Brown) | Terry Anderson | Network Engineer II | tanderson@kyhousing.org | Technology Services |
| Primary Service Desk Technical Lead (Replaced Steven Reynolds) | Doug VanWinkle | Network Analyst II | dvanwinkle@kyhousing.org | Technology Services |
| Secondary Service Desk Technical Lead | Lydia Jefferson | Network Analyst III | ljefferson@kyhousing.org | Technology Services |

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| | | | | |
|--|--------------------------------------|-------------------------------------|--|--------------------------------------|
| Change Manager | Nathan Hall | Senior Account Administrator | nhall@kyhousing.org | Communication and Marketing Services |
| Primary Security Technical Lead | Charlie Colley | Cyber Security Analyst | ccolley@kyhousing.org | Cyber Security |
| OTHERS | | | | |
| Primary Application Services Technical Lead/Database Administrator | Rachel Reid | Database Administrator | rreid@kyhousing.org | Technology Services |
| Secondary Application Services Technical Lead/Database Administrator | Matthew Manche | Senior Software Engineer | mmanche@kyhousing.org | Technology Services |
| Cyber Security Manager | Nolyn Johnson | Cyber Security Manager | njohnson@kyhousing.org | Cyber Security |
| SharePoint Primary Administration and Technical Lead | David Johnson (No longer with KHC) | SharePoint Administrator | djohnson@kyhousing.org | N/A |
| Secondary Security Technical Lead | Amanda Urbansky (No longer with KHC) | Cyber Security Analyst | aurbansky@kyhousing.org | Cyber Security |
| KHC's V-Soft Account Manager | Annita Rucker | Senior Business Development Manager | ARucker@vsoftconsulting.com | V-Soft |
| V-Soft Director of Infrastructure | Jack Olcott | Director of Infrastructure | jolcott@vsoftconsulting.com | V-Soft |
| V-Soft Technical Project Manager | Malcom Dia | Technical Project Manager | c-mdia@vsoftconsulting.com | V-Soft |
| V-Soft M365 Technical Lead | Jonathan Greenwell | Lead Technical Resource | jonathan.greenwell@protonmail.com | V-Soft |
| | | | | |

Project Deliverables

| Deliverable | Deliverable Fulfilled? (Y/N) |
|---|------------------------------|
| Approved KHC Internal Statement of Work (SOW) | Yes |
| Procurement (Professional Services RFP Process, Vendor Management, and Payment) | Yes |
| M365 OneDrive Implementation | Yes |
| M365 Online Application Implementation | Yes |
| Review MS Teams and SharePoint Online Configuration | Yes |
| Staff Adoption Strategy and Documentation | Yes |
| Project Close Out Document | N (In Progress) |

Corporate Project Close Out

Project Close-Out Overview

PREVIOUS ENVIRONMENT

File storage and Microsoft M365 collaboration services strategies were incomplete, undefined, unstructured, and/or structured in an inefficient manner. Data structure architecture and accessibility had not been modernized to meet the current needs of a remote workforce.

Each staff member was provided a local Documents folder on their client device (e.g., laptop, desktop) which was synchronized with a “Homeshares” folder stored on an on-premises file server and accessed via a mapped H: network drive. Each on-premises “Homeshares” staff folder was permissioned for access only for the respective staff member modify rights and for required Technology Services administration.

Staff member was required to connect to the KHC network to access their H: drive “Homeshare” folder (e.g., onsite at main office, VPN connection).

Existing file type restrictions were in place by file extension and exceptions related to current staff Homeshares folders were minimal.

Since OneDrive was not rolled out to all staff, licensing for M365 online applications such as Word, Excel, PowerPoint, and OneNote had been assigned to only a limited number of staff.

KHC had only a minimal number of MS Teams teams and SharePoint Online sites.

No current M365 OneDrive staff adoption strategy.

CURRENT ENVIRONMENT AFTER THIS PROJECT

Each staff member still has a local Documents folder which is synchronized with the staff member’s respective folder(s) on OneDrive, securely permissioned, and a backup solution is in place.

OneDrive Requirements

- User Permissions
 - Individual permissions for staff's own OneDrive folder to be the default
- Sharing Permissions (e.g., Ability to Share, Internal and/or External)
 - Sharing Permissions - Each staff member has been granted access to create files/folder as they desire on their respective OneDrive location and to share out those files/folders as they desire
 - Default sharing permissions will be internal only and external sharing is blocked, but a policy is available to allow an exception for external sharing on a case by case basis and per staff member account
- File Restrictions (e.g., File Types)
 - File restrictions implemented on OneDrive per the existing Data Loss Prevention (DLP) policy
 - File restrictions mimic previous on premises restrictions

Staff member’s KHC OneDrive storage is accessible via any Internet connection through an Internet browser.

Rollout complete for M365 online applications such as Word, Excel, PowerPoint, and OneNote.

Staff members have the ability to collaboratively work on a file simultaneously with other KHC staff.

Corporate Project Close Out

Existing MS Teams teams and SharePoint Online sites reviewed, securely configured, and a backup solution in place.

M365 OneDrive staff adoption strategy implemented, and administrative staff successfully trained.

IN SCOPE

Professional Services Procurement

M365 OneDrive Implementation

- OneDrive Configuration
- OneDrive Data Security
- Staff Adoption Strategy/Change Management, Including Communication and Training
- Migration of Staff Documents (includes H: Drive/Homeshares) Folder to OneDrive

M365 Online Application Implementation, Including Work, Excel, PowerPoint, and OneNote

Review MS Teams and SharePoint Online Configuration

- Prepare and Configure M365 Tenant Environment for the Workloads, Scope, and Data (e.g., Azure Active Directory, Define/Create Active Directory Policies)
- MS Teams and SharePoint Online Data Security (e.g., Active Directory Policies)

Knowledge Transfer

OUT OF SCOPE

M365 Backup Solution (Removed From Original Project Scope)

M365 License Procurement (Required Licensing Previously Procured)

Migration of On-Premises Data Outside of Existing Staff File Server Homeshares Folders and Local Documents Folders, Including, But Not Limited To, the Following:

- Shared/Mapped Folders Other Than Staff Homeshares (H: Drive) Folders (e.g., P: Drive, G: Drive)
- KHC Intranet
- SharePoint Sites
- Files Stored in Databases
- Files Stored on Application Servers
- Integrations with Files/Folders Not Being Migrated
- KnowledgeLake Document Management System
- 8x8 Phone System and Contact Center

SCHEDULED MAINTENANCE WINDOWS

- None Required

PROJECT CHANGE REQUESTS

Project Change Request CR35 Approved on 9/20/2023 (Submitted on 9/15/2023)

- Added Jon Davidson as IT Project Sponsor/Signature Authority to replace Joe Sanders, who is no longer with KHC as of 9/1/2023.

Project Change Request CR43 Approved on 4/18/2024 (Submitted on 3/19/2024)

- Due to internal KHC labor resource constraints preventing the Implementation Phase from being completed on schedule, a project change request was submitted to request and extension for the 3/29/2024 project end date to 4/30/2024 based on Implementation Phase being completed by 4/12/2024, then a couple week for Close Out Phase.

Corporate Project Close Out

Project Schedule (Actual Dates)

| | |
|---------------------|-------------------------------------|
| Initiating-Planning | 7/1/2021 - 4/18/2024 |
| Procurement | 7/14/2021 – 5/2/2023 |
| Implementation | 3/1/2022 – 4/23/2024 |
| Close Out | 3/25/2024 – 4/30/2024 (Anticipated) |

What deliverables, if any, were not provided at the time of project close-out? Determine need for additional phase of work.

- None.

What were costs?

\$141,853.80 TOTAL PROJECT PROCUREMENT (\$190,668.80 Budgeted for Project)

- \$ 43,443.80 PO 2908 Professional Services From V-Soft Consulting Group, Inc. via RFP Process
- \$ 98,410.00 Estimated Actual for Internal KHC Labor Cost
 - 2,265 hours were total budgeted project KHC labor hours (\$147,225.00).
 - Based on an estimated average KHC labor cost of \$65.00 per hour and estimated actual 1,514 hours, the total estimated internal labor cost is \$ 98,410.00.

Describe how project deliverables were integrated into the department/corporation processes?

- New in scope physical host servers have been transitioned to operations for ongoing management such as support and security updates.

Describe how any ongoing project costs have been included in the budget to ensure continuity.

- Any recurring cost past the three year prepaid maintenance/subscriptions need to be included in the budget.

What is the Transition to Support?

- New physical host servers implemented have been transitioned to operations for ongoing management such as support and security updates.

Additional items which are part of the project close out process:

- Project Close Out Meeting Held on Tuesday, 4/23/2024
- Project Close Out Document Approval
- Verify All Project Documentation is Archived

Corporate Project Close Out

Lessons Learned

🕒 Project Lessons Learned Dashboard ☆

Project Lessons Learned Summary

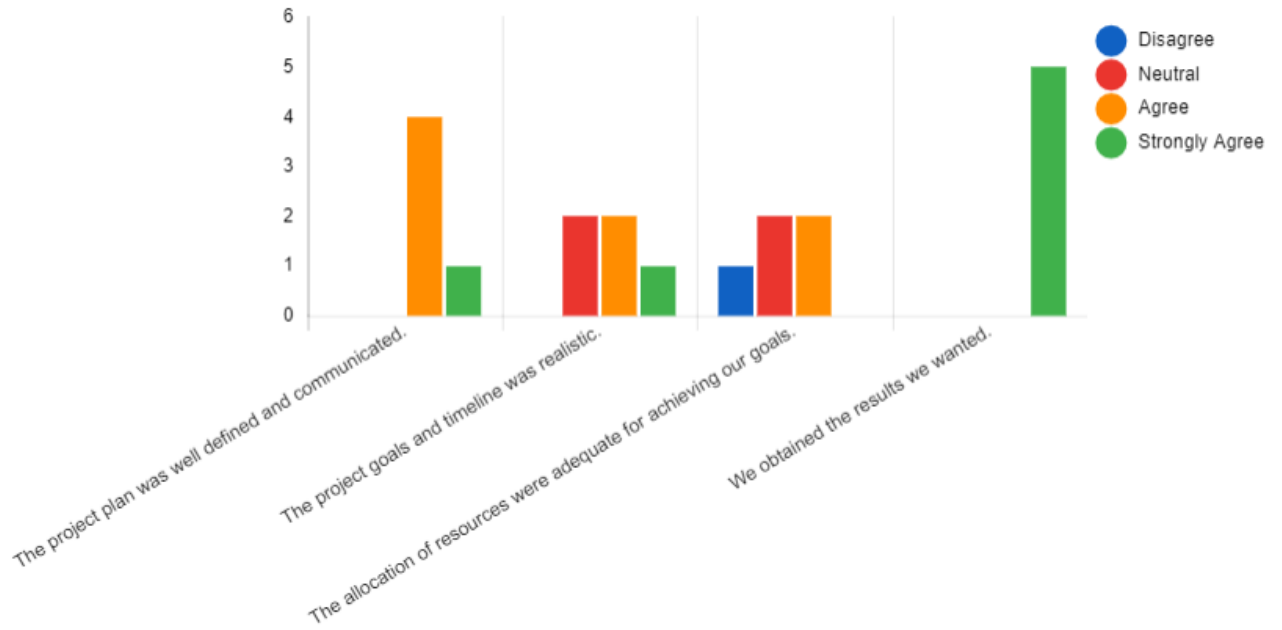
M365 Collaboration Services Phase 1

Surveys

Submitted

4

Ratings



Corporate Project Close Out

What went well on the project?

Love the "white glove" approach! Thanks for utilizing this tool to share and edit files.

I think that while things moved slower than we wanted (mostly because the initial scripting from our vendor was a disaster), the method we had to use worked out in the favor of the users. We had to have a white-glove touch that I think everyone appreciated a lot.

Having to take the time also allowed cleanup on some of the back-end problems that I'll talk about later in this survey. The slowdowns were in some ways a blessing and helped staff acclimate to OneDrive and ensure all their files were migrated.

I think staff satisfaction was great throughout the process. The "white glove" approach coupled with the training and comms helped to automate things a bit but for staff it felt like they were being special treatment.

Keys which ensured a successful corporate wide migration to OneDrive
Testing process prior to corporate OneDrive migration
White glove type migration process
High level corporate wide Communication plan
Individual user migration communication plan, including links to training, scheduling, and migration steps
Having Nathan Hall in the Change Manager role was key to developing informative and professional looking training for staff members

Overall, I felt like my time on the project went extremely well. The team was great to work with and made it much easier for me to operate in my role.

How can the project process be improved?

Potentially postponing transition of key resource until project completion is finished.

I'm not sure. Maybe the scheduling, especially in areas where we knew there would be problems. I think the manager-first approach, coupled with the white-glove, mitigated ruffled feathers but didn't help too much with those that were hard to pin down. There wasn't much backup from Bryan (that I could see) or the area's managers when it came down to it.

Not sure, the issues we had were outside our control. I think we could have moved faster with more IT staff working on the migration. Since not everyone in a department was migrating at once, we could have done some departments concurrently with more resources.

Better scope definition since three months or so (July 2022-October 2022) of project was spent attempting to find and procure an M365 backup solution and the solution was eventually removed from the awarded RFP scope as well as from the scope of this project

Better RFP scope definition and more streamlined procurement process since it took almost one year from the start of the RFP process to enacted contract and PO (July 2021-June 2022)

I think we could have made better uses of resources and applications we currently use such as looking into more integration with TDX and SmartSheets and other project software.

What aspect of the project was most frustrating?

Seemed like there were several instances where resource constraints were identified and the transition of a key team member during the implementation.

For me, the initial formulation. It took forever to get a game plan together. For everyone else, I would say the scheduling. It's extended the timeline significantly and was the limiting factor in the migration as a whole.

Getting started (getting the process down) and finishing. Nailing down the process was a lot in the beginning. Afterwards, just getting through our staff has been a drawn out affair.

Key project team member was moved off of the project near end of project causing delays in project completion

At times it felt like we were extremely understaffed on the deployment and user end. The timing on the project caused for the project to take up most of my time and took me away from day to day for weeks at a time. I felt as though the timing and scheduling was on par, however more resources were needed for the white glove treatment.

Corporate Project Close Out

What were the key problem areas (i.e., budget, schedule, etc.)?

schedule

I think on the backend there has been a lot of things; the initial scripting, issues with groups and legacy setups, getting things archived/cleaned out after migration, etc.

I think process. The process was always involved and the "white glove" approach made staff feel like they were getting special treatment but slowed things down.

Professional Services final invoice was paid by KHC Accounting prior to completion of work and without notifying PM nor TS Managing Director

Three months or so (July 2022-October 2022) of project was spent attempting to find an M365 backup solution and the solution was eventually removed from the scope of the awarded RFP as well as from the scope of this project

It took almost one year from the start of the RFP process to enacted contract and PO (July 2021-June 2022)

Key project team member moved off project near end of project caused delays in project completion

Lack of dedicated/focused internal KHC project resources since team members also were responsible for operations and other task which pulled them from this project multiple times during the project

The key and only problem area I witnessed was resource drain and felt the project was understaffed for the type of rollout that was planned.

Additional Comments:

Overall great work, my comments are only constructive in an attempt to improve the process going forward. Good job to all parties and resources involved - this has helped KHC adapt and work for efficiently and share files - KUDOS!

Just that at the end of the day, the project was a huge success even if it's taken way longer than anticipated. Normally staff are upset/disrupted by a change like this and that wasn't the case here. Most were unaffected by the shift overall but many have found new ways to collaborate with the move to OneDrive.

Additionally, the speed of migration has allowed Tech Services to clean up legacy issues hiding in the GPs and elsewhere, while also getting together a comprehensive backup solution together. One project has in essence done the work of maybe three or more in the longterm M365 plan.

I think we did better than possible with the resources and starting point we were given. While the overall project was slow, this gave staff a feeling that they were being taken care of, and gave IT the chance to clean up legacy/incorrect group configs and nail down a more comprehensive and long-term backup process.

So, silver linings in the slow overall process IMO.

Throughout this multi-year project, despite facing numerous obstacles and personnel changes, team members remained committed to the project plan, ultimately achieving success in completing the project scope. Grateful for the commitment shown by everyone involved.

Staff Survey

OneDrive Migration KHC Staff Survey Responses From KHC Staff Who Completed the M365 Migration Process to OneDrive From the H:Drive (80 Staff Members Submitted a Survey)

4.85★
average rating

How would you rate the migration process overall?

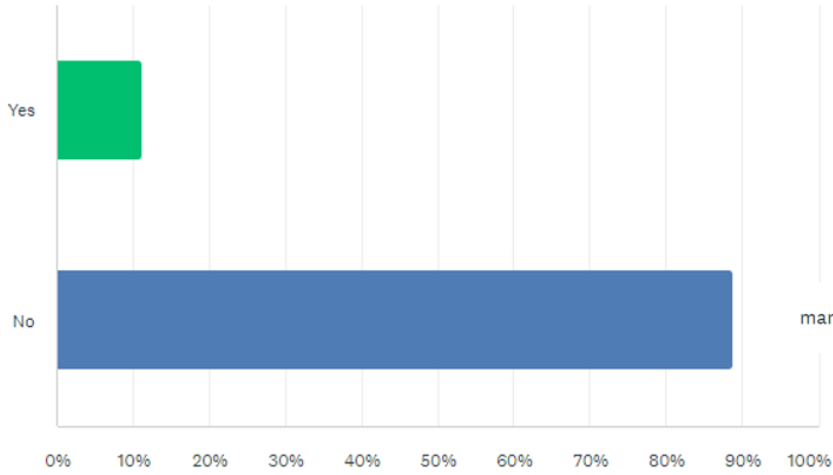
Answered: 80 Skipped: 0



Corporate Project Close Out

Did you run into any issues during the migration?

Answered: 80 Skipped: 0



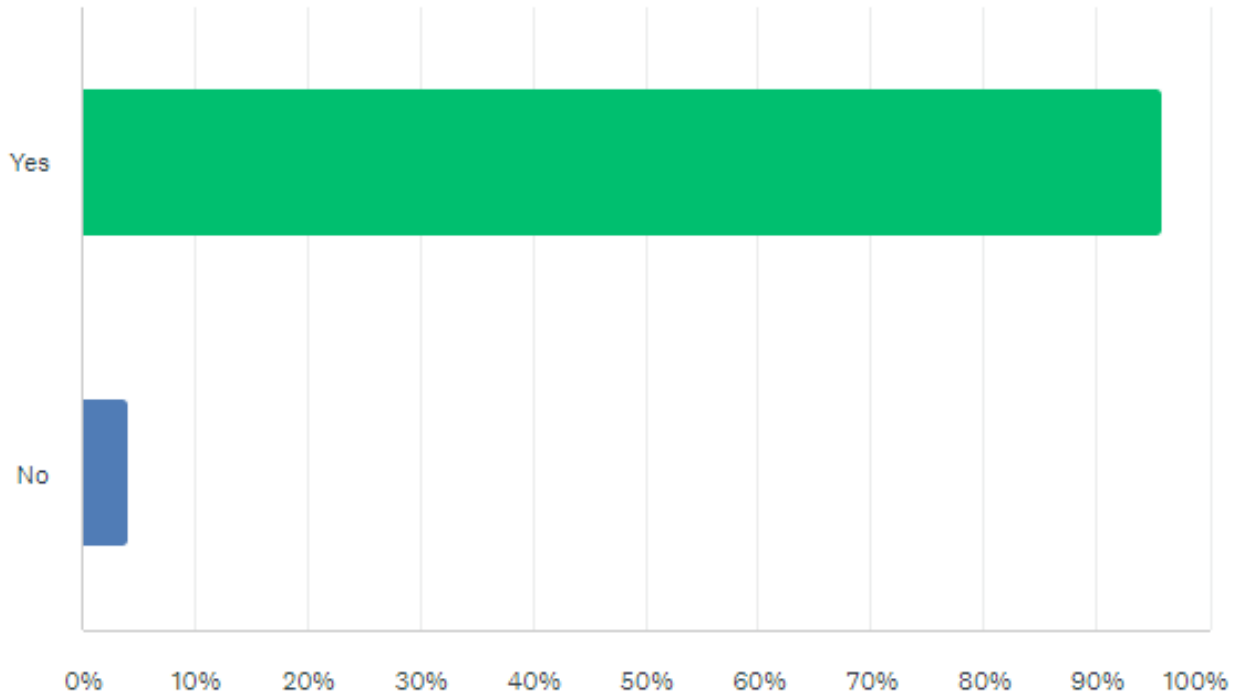
What issues did you have?

Answered: 8 Skipped: 72

- "It took several restarts of my computer for the migration to complete."
- "I had a few files that would not back up, Steven figured out the issue and got it resolved! Yay!!"
- "Files not copied over...had to restart several times."
- "Minor issue - files were not transferring as expected. Really don't know more than that. IT Team members were great!"
- "The updates would not start as they were supposed to and had to be forced to start"
- "Several of the updates had to be "forced" and files manually copied over -- however, Steven handled all of that with ease, quickly and efficiently."
- "COMPUTER NEEDED TO BE UPDATED, IT HADN'T UPDATED SINCE OCTOBER OF 2022 THIS CAUSED SOME DELAYS STEVEN WAS GREAT TAKING CARE OF EVERYTHING"
- "Issues copying files over - however, Lydia handled everything - she did a wonderful job."

Are you enjoying OneDrive so far?

Answered: 74 Skipped: 6



Corporate Project Close Out

What do you not like about OneDrive over the H: Drive?

Answered: 4 Skipped: 76

“The migration just took place yesterday and I have not seen any difference yet. ”

“Have not used it yet so I did not answer question”

“N/A”

“Have been at a conference and have not used yet. ”

Review and Acceptance

The persons named below have reviewed and agree with the content of this Project Close Out document.

Bryan Williams/Technology Services Operations
Manager

Name/Title

Signature/Date

Corporate Project Close Out

Approvals

| Director/Sponsor Approval: | | |
|-----------------------------------|--|--|
| Name: | Role: | Department |
| David Carroll | IT Executive Sponsor/Signature Authority/Procurement | Technology Services |
| Signature/Date: | | |
| Director/Sponsor Approval: | | |
| Name: | Role: | Department |
| Jon Davidson | Business Executive Sponsor/Procurement Officer | Executive Directors Office |
| Signature/Date: | | |
| PMO Approval: | | |
| Name: | Role: | Department |
| Gloria Wright | Corporate Project Manager | Corporate Planning and Accountability |
| Signature/Date: | | |



**M365 COLLABORATION SERVICES
PHASE I CORPORATE PROJECT**

**CLOSE OUT MEETING
TUESDAY, APRIL 23, 2024**

PRIMARY PROJECT TEAM



| Role | Name | Department |
|---|--|----------------------------|
| Business Executive Sponsor/Procurement Officer | Jon Davidson , Deputy Executive Director Business Services | Executive Directors Office |
| IT Executive Sponsor/Signature Authority/Procurement (Replaced Joe Sanders) | David Carroll , Managing Director Information Technology (Replaced Joe Sanders) | Technology Services |
| Project Manager | Keith Lilly , IT Infrastructure Project Manager | Technology Services |
| Operations Manager (Network Services, Service Desk, and Application Services) | Bryan Williams , Technology Services Operations Manager | Technology Services |
| Primary M365 Administrator and Technical Lead (Replaced Terry Anderson) | Charles “Scott” Sullivan , Network Engineer | Technology Services |

PRIMARY PROJECT TEAM (CONT.)



| Role | Name | Department |
|---|---|--------------------------------------|
| Secondary M365 Administrator and Technical Lead (Replaced Charles “Scott” Sullivan) | Terry Anderson , Network Engineer II | Technology Services |
| Primary Service Desk Technical Lead (Replaced Steven Reynolds) | Doug VanWinkle , Network Analyst II | Technology Services |
| Secondary Service Desk Technical Lead | Lydia Jefferson , Team Lead Service Desk/Network Analyst III | Technology Services |
| Change Manager | Nathan Hall , Senior Account Administrator | Communication and Marketing Services |
| Primary Security Technical Lead | Charles Colley , Cyber Security Analyst | Cyber Security |

PROJECT TEAM (OTHERS)



| Role | Name | Department |
|---|--|--------------------------------------|
| Primary Application Services Technical Lead/Database Administrator | Rachel Reid , Database Administrator | Technology Services |
| Secondary Application Services Technical Lead/Secondary Database Administrator/Secondary SharePoint Administrator | Matthew Manche , Senior Software Engineer | Technology Services |
| Cyber Security Manager | Nolyn Johnson , Cyber Security Manager | Communication and Marketing Services |
| Primary SharePoint Technical Lead | David Johnson , SharePoint Administrator (No longer with KHC) | Technology Services |
| Secondary Security Technical Lead | Amanda Urbansky , Cyber Security Analyst (No longer with KHC) | Cyber Security |

PROJECT OVERVIEW



- Business Need and Objectives: To provide Microsoft 365 (M365) collaboration services for KHC business unit programs, KHC needed to review and configure their existing M365 collaboration services OneDrive for Business, Microsoft Teams, and SharePoint Online as well as migrate KHC staff members' existing Documents folder to M365 OneDrive.
- With only exception being Project Close Out Document, all Project Deliverables completed, including:
 - Procurement (Professional Services RFP Process, Vendor Management, and Payment)
 - M365 OneDrive and Online Application (e.g., Word, Excel) Implementation
 - Review MS Teams and SharePoint Online Configuration
 - Staff Adoption Strategy

PROJECT SCOPE



- IN SCOPE
 - Professional Services Procurement
 - M365 OneDrive Implementation
 - OneDrive Configuration
 - OneDrive Data Security
 - Staff Adoption Strategy/Change Management, Including Communication and Training
 - Migration of Staff Documents (includes H: Drive/Homeshares) Folder to OneDrive
 - M365 Online Application Implementation, Including Work, Excel, PowerPoint, and OneNote
 - Review MS Teams and SharePoint Online Configuration
 - Prepare and Configure M365 Tenant Environment for the Workloads, Scope, and Data (e.g., Azure Active Directory, Define/Create Active Directory Policies)
 - MS Teams and SharePoint Online Data Security (e.g., Active Directory Policies)
 - Knowledge Transfer

PROJECT SCOPE (CONT.)



- OUT OF SCOPE
 - M365 Backup Solution (Removed From Original Project Scope)
 - M365 License Procurement (Required Licensing Previously Procured)
 - Migration of On-Premises Data Outside of Existing Staff File Server Homeshares Folders and Local Documents Folders, Including, But Not Limited To, the Following:
 - Shared/Mapped Folders Other Than Staff Homeshares (H: Drive) Folders (e.g., P: Drive, G: Drive)
 - KHC Intranet
 - SharePoint Sites
 - Files Stored in Databases
 - Files Stored on Application Servers
 - Integrations with Files/Folders Not Being Migrated
 - KnowledgeLake Document Management System
 - 8x8 Phone System and Contact Center

PROJECT CHANGE REQUESTS



- PROJECT CHANGE REQUESTS


- Project Change Request CR35 Approved on 9/20/2023 (Submitted on 9/15/2023)
 - Added Jon Davidson as IT Project Sponsor/Signature Authority to replace Joe Sanders, who is no longer with KHC as of 9/1/2023.
- Project Change Request CR43 Approved on 4/18/2024 (Submitted on 3/19/2024)
 - Due to internal KHC labor resource constraints preventing the Implementation Phase from being completed on schedule, a project change request was submitted to request an extension for the 3/29/2024 project end date to 4/30/2024 based on Implementation Phase being completed by 4/12/2024, then a couple weeks for Close Out Phase.

PROCUREMENT OVERVIEW



- \$141,853.80 (\$190,668.80 Budgeted for Project)
 - \$ 43,443.80 PO 2908 Professional Services From V-Soft Consulting Group, Inc. via RFP Process
 - \$ 98,410.00 Estimated Actual for Internal KHC Labor Cost
 - 2,265 Hours Estimated Total Project Budget KHC Labor Hours (\$147,225.00)
 - July 2021 – April 2024: 1,514 Estimated Hours x \$65 per Hour = \$ 98,410.00

PROJECT SCHEDULE (ACTUAL DATES)



| | |
|---------------------|-------------------------------------|
| Initiating-Planning | 07/01/2021-04/18/2024 |
| Procurement | 07/14/2021-05/02/2023 |
| Implementation | 03/01/2022-04/23/2024 |
| Project Close Out | 03/25/2024-04/30/2024 (Anticipated) |

LESSONS LEARNED

🕒 Project Lessons Learned Dashboard ☆

Project Lessons Learned Summary

M365 Collaboration Services Phase 1

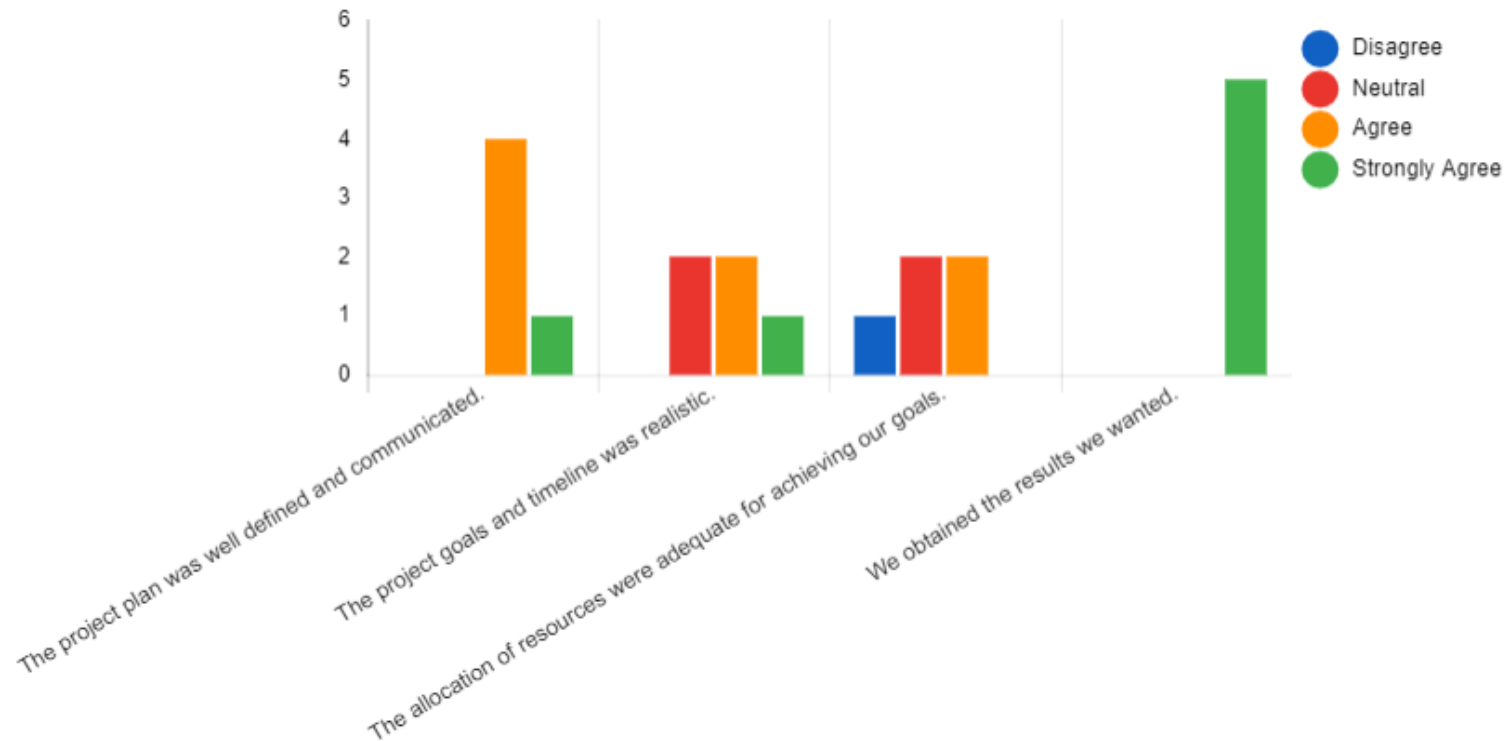


Surveys

Submitted

4

Ratings



LESSONS LEARNED



Feedback

What went well on the project?

Love the "white glove" approach! Thanks for utilizing this tool to share and edit files.

I think that while things moved slower than we wanted (mostly because the initial scripting from our vendor was a disaster), the method we had to use worked out in the favor of the users. We had to have a white-glove touch that I think everyone appreciated a lot.

Having to take the time also allowed cleanup on some of the back-end problems that I'll talk about later in this survey. The slowdowns were in some ways a blessing and helped staff acclimate to OneDrive and ensure all their files were migrated.

I think staff satisfaction was great throughout the process. The "white glove" approach coupled with the training and comms helped to automate things a bit but for staff it felt like they were being special treatment.

Keys which ensured a successful corporate wide migration to OneDrive
Testing process prior to corporate OneDrive migration
White glove type migration process
High level corporate wide Communication plan
Individual user migration communication plan, including links to training, scheduling, and migration steps
Having Nathan Hall in the Change Manager role was key to developing informative and professional looking training for staff members

Overall, I felt like my time on the project went extremely well. The team was great to work with and made it much easier for me to operate in my role.

LESSONS LEARNED



Feedback

What aspect of the project was most frustrating?

Seemed like there were several instances where resource constraints were identified and the transition of a key team member during the implementation.

For me, the initial formulation. It took forever to get a game plan together. For everyone else, I would say the scheduling. It's extended the timeline significantly and was the limiting factor in the migration as a whole.

Getting started (getting the process down) and finishing. Nailing down the process was a lot in the beginning. Afterwards, just getting through our staff has been a drawn out affair.

Key project team member was moved off of the project near end of project causing delays in project completion

At times it felt like we were extremely understaffed on the deployment and user end. The timing on the project caused for the project to take up most of my time and took me away from day to day for weeks at a time. I felt as though the timing and scheduling was on par, however more resources were needed for the white glove treatment.

LESSONS LEARNED



Feedback

How can the project process be improved?

Potentially postponing transition of key resource until project completion is finished.

I'm not sure. Maybe the scheduling, especially in areas where we knew there would be problems. I think the manager-first approach, coupled with the white-glove, mitigated ruffled feathers but didn't help too much with those that were hard to pin down. There wasn't much backup from Bryan (that I could see) or the area's managers when it came down to it.

Not sure, the issues we had were outside our control. I think we could have moved faster with more IT staff working on the migration. Since not everyone in a department was migrating at once, we could have done some departments concurrently with more resources.

Better scope definition since three months or so (July 2022-October 2022) of project was spent attempting to find and procure an M365 backup solution and the solution was eventually removed from the awarded RFP scope as well as from the scope of this project

Better RFP scope definition and more streamlined procurement process since it took almost one year from the start of the RFP process to enacted contract and PO (July 2021-June 2022)

I think we could have made better uses of resources and applications we currently use such as looking into more integration with TDX and SmartSheets and other project software.

LESSONS LEARNED



Feedback

What were the key problem areas (i.e., budget, schedule, etc.)?

schedule

I think on the backend there has been a lot of things; the initial scripting, issues with groups and legacy setups, getting things archived/cleaned out after migration, etc.

I think process. The process was always involved and the "white glove" approach made staff feel like they were getting special treatment but slowed things down.

Professional Services final invoice was paid by KHC Accounting prior to completion of work and without notifying PM nor TS Managing Director

Three months or so (July 2022-October 2022) of project was spent attempting to find an M365 backup solution and the solution was eventually removed from the scope of the awarded RFP as well as from the scope of this project

It took almost one year from the start of the RFP process to enacted contract and PO (July 2021-June 2022)

Key project team member moved off project near end of project caused delays in project completion

Lack of dedicated/focused internal KHC project resources since team members also were responsible for operations and other task which pulled them from this project multiple times during the project

The key and only problem area I witnessed was resource drain and felt the project was understaffed for the type of rollout that was planned.

LESSONS LEARNED



Feedback

Additional Comments:

Overall great work, my comments are only constructive in an attempt to improve the process going forward. Good job to all parties and resources involved - this has helped KHC adapt and work for efficiently and share files - KUDOS!

Just that at the end of the day, the project was a huge success even if it's taken way longer than anticipated. Normally staff are upset/disrupted by a change like this and that wasn't the case here. Most were unaffected by the shift overall but many have found new ways to collaborate with the move to OneDrive.

Additionally, the speed of migration has allowed Tech Services to clean up legacy issues hiding in the GPs and elsewhere, while also getting together a comprehensive backup solution together. One project has in essence done the work of maybe three or more in the longterm M365 plan.

I think we did better than possible with the resources and starting point we were given. While the overall project was slow, this gave staff a feeling that they were being taken care of, and gave IT the chance to clean up legacy/incorrect group configs and nail down a more comprehensive and long-term backup process.

So, silver linings in the slow overall process IMO.

Throughout this multi-year project, despite facing numerous obstacles and personnel changes, team members remained committed to the project plan, ultimately achieving success in completing the project scope. Grateful for the commitment shown by everyone involved.

ONEDRIVE MIGRATION KHC STAFF SURVEY



Responses From KHC Staff Who Completed the M365
Migration Process to OneDrive From the H: Drive

80 Staff Members Submitted a Survey

How would you rate the migration process overall?

Answered: 80 Skipped: 0

4.85★

average rating

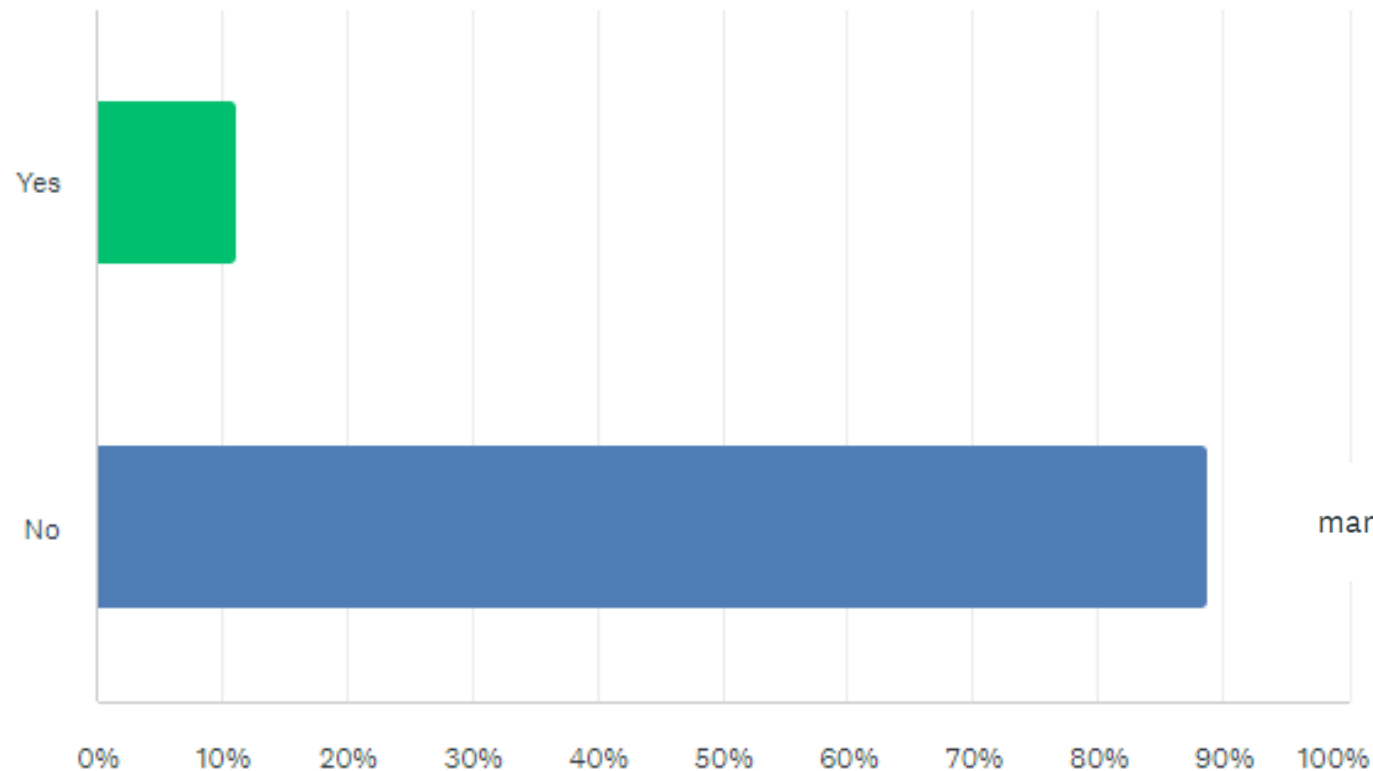


ONEDRIVE MIGRATION KHC STAFF SURVEY



Did you run into any issues during the migration?

Answered: 80 Skipped: 0



What issues did you have?

Answered: 8 Skipped: 72

“It took several restarts of my computer for the migration to complete.”

“I had a few files that would not back up, Steven figured out the issue and got it resolved! Yay!!”

“Files not copied over...had to restart several times.”

“Minor issue - files were not transferring as expected. Really don't know more than that. IT Team members were great!”

“The updates would not start as they were supposed to and had to be forced to start”

“Several of the updates had to be "forced" and files manually copied over -- however, Steven handled all of that with ease, quickly and efficiently.”

“COMPUTER NEEDED TO BE UPDATED, IT HADN'T UPDATED SINCE OCTOBER OF 2022 THIS CAUSED SOME DELAYS STEVEN WAS GREAT TAKING CARE OF EVERYTHING”

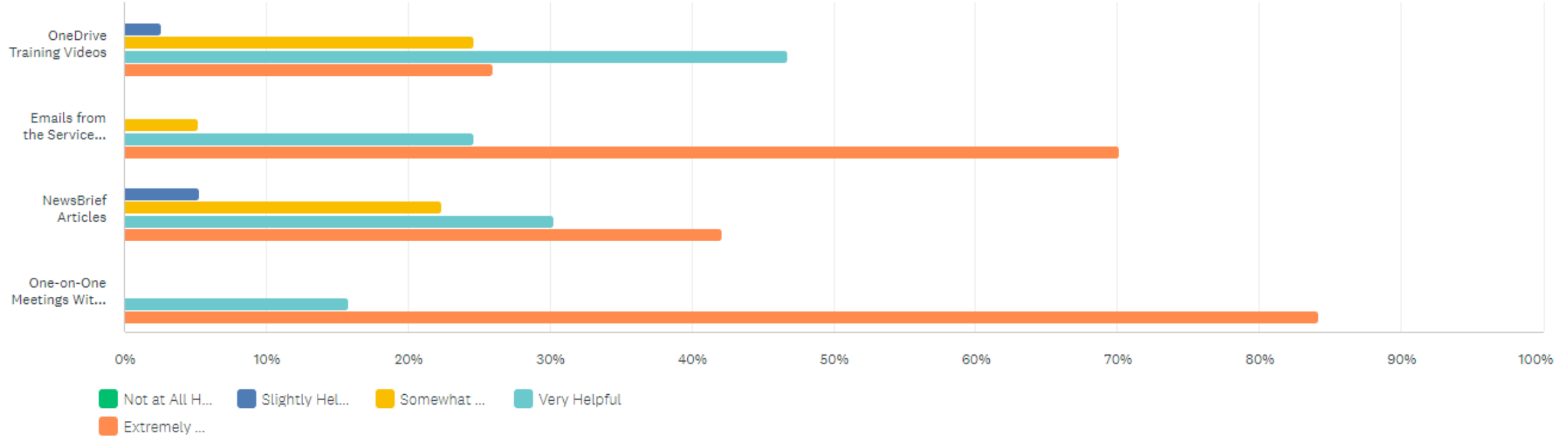
“Issues copying files over - however, Lydia handled everything - she did a wonderful job.”

ONEDRIVE MIGRATION KHC STAFF SURVEY



How helpful were the following?

Answered: 77 Skipped: 3

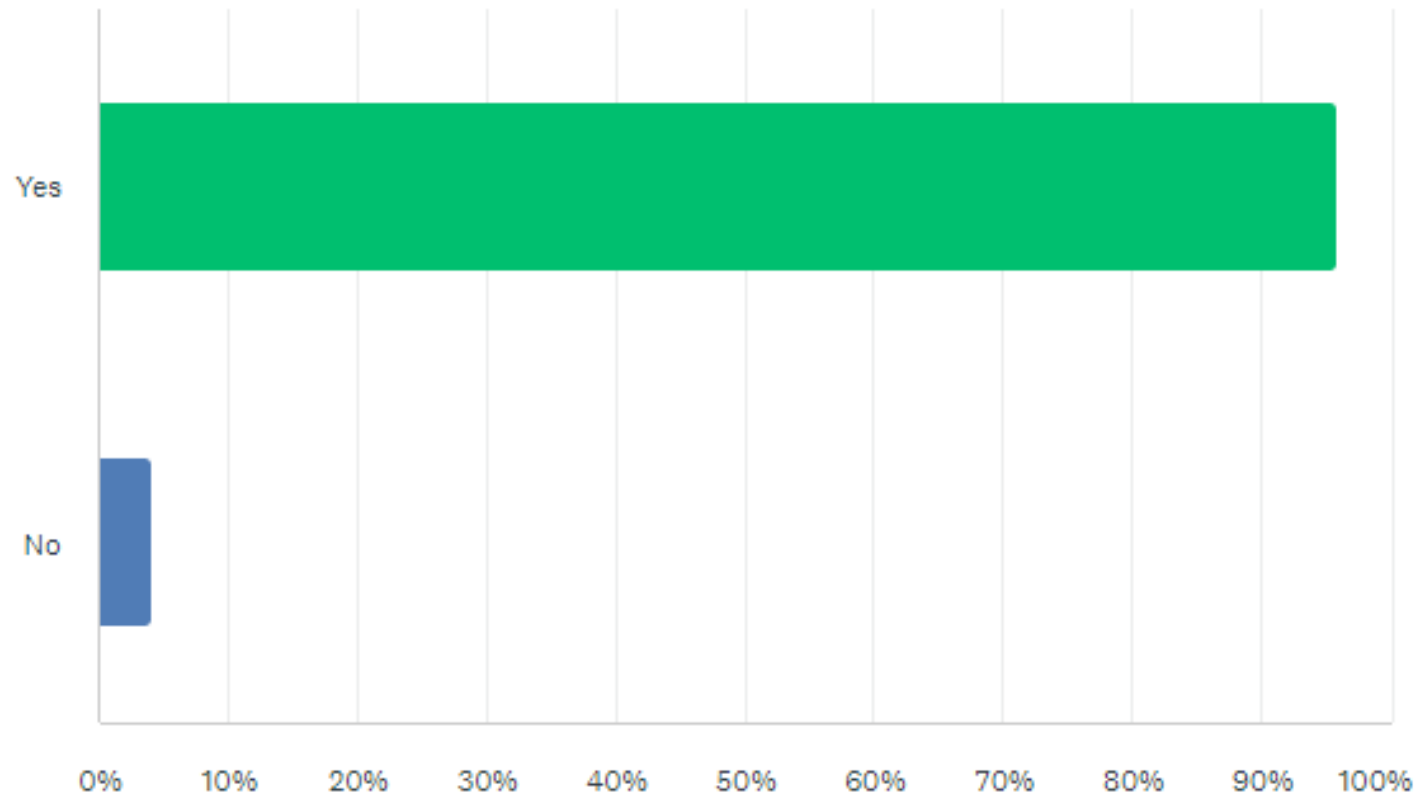


ONEDRIVE MIGRATION KHC STAFF SURVEY



Are you enjoying OneDrive so far?

Answered: 74 Skipped: 6



ONEDRIVE MIGRATION KHC STAFF SURVEY



What do you not like about OneDrive over the H: Drive?

Answered: 4 Skipped: 76

“The migration just took place yesterday and I have not seen any difference yet. ”

“Have not used it yet so I did not answer question”

“N/A”

“Have been at a conference and have not used yet. ”

NEXT STEPS



- Complete Project Close Out
 - Project Close Out Meeting
 - Document Final Lessons Learned
 - Project Close Out Document Approval
 - Archive Project Documentation

OneDrive

at **KHC** Kentucky Housing Corporation
investing in quality housing solutions.



CELEBRATE
Success!

THANK YOU

QUESTIONS/COMMENTS/CONCERNS

4.85 ★
average rating



The News Brief

KHC's Official Information Source

VOL : 18.135

TUESDAY, MAY 15, 2018

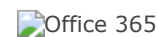
DAILY EDITION

"The world as we have created it is a process of our thinking. It cannot be changed without changing our thinking." ~Albert Einstein

Corporate News

Email Migration to Microsoft Office 365

Technology Services is preparing to implement the next feature of Microsoft Office 365. The first steps included the update to Microsoft Outlook 2016 and addition of Skype for Business. These tools were just the beginning to providing flexibility and effective collaboration within and across departments.



During the week of May 21, 2018, Technology Services will be migrating KHC's corporate email to Microsoft Office 365 cloud-based service. Some benefits of this change will include an increase in individual mailbox size and the ability to further enhance security.

Staff will receive an email notification prior to their mailbox being migrated with more details. Access to email the night of the migration will be unavailable starting at 8 p.m. that evening until 7 a.m. the next morning.

During the migration of users, staff may experience the following pop up advising them that the administrator has made changes requiring a restart of Outlook. When this message is received, click *OK* and restart the application.



All KHC mailbox migrations are scheduled to be completed by Friday, May 25, 2018.

After your migration, if you run into any issues with Outlook on your computer, the first step is to restart the Outlook application on that computer or restart the email application on your mobile phone. If that fails to resolve the issue, please contact the email the [Help Desk](#) or call at extension 275.

Creative Housing Strategies Bring Community to Neighborhoods in the Louisville Region



Andrew Hawes, guest blogger, serves as the President of The Housing Partnership, Inc., a non-profit real estate development organization that creates affordable housing opportunities to encourage family stability and support and empower communities. This week, he talks about how the work that Housing Partnership in Louisville, Kentucky is making impact. To read this [post](#), visit the [Strategic Housing blog](#).

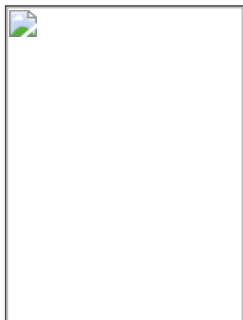
April 2018 Accounts Payable Cut-Off: Today

Please submit all invoices and Accounts Payable Vouchers for goods/services incurred through April 2018, to Accounting by the close of business on **today, Tuesday, May 15, 2018**. Please contact your Accounting representative with questions.

Employee News

Welcome New KHC Face

Welcome to Jaseudia Turner, a contract employee working in the Technology Services department.



Go365 Webinars for May

As a benefit for Kentucky Employees' Health Plan (KEHP) members, Go365 is offering free webinars to help members learn more about the mobile app, logging into your account, the Go365 dashboard, challenges, and more.

Register below to participate in one of the free webinars this month!

May 15, 2018

[Sync up with Go365](#)

12:00 p.m. ET

May 16, 2018

[Know & Go: Go365 App](#)

12:00 p.m. ET

[Know & Go: Go365 App](#)

2:00 p.m. ET

May 17, 2018

[Sync up with Go365](#)

12:00 p.m. ET



Open Enrollment is Now

Open Enrollment for Avesis Vision, Delta Dental, Guardian Life Insurance, and AAA will be **May 7, 2018 through May 18, 2018**. This is the time to add or drop coverage; you only need to complete enrollment paperwork for **changes**. If you wish to keep your current coverage, you do not need to complete any paperwork.

Below are the enrollment forms if you wish to make changes to your current elections:

- [Avesis Vision](#)
- [AAA](#)
- [Delta Dental](#)
- [Guardian Life & LTD](#)

Once completed, please return to your form(s) to Employee Services. If you have questions, please contact [Kristen Ledbetter](#) at extension 551.

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The NewsBrief

KHC's Official Information Source

VOL : 23.89

THURSDAY, MARCH 30, 2023

DAILY EDITION

"Love is the power to see similarity in the dissimilar." ~Theodor W. Adorno

Corporate News

West Wing Masonry Project

KHC is having some masonry work done on the West Wing of the main building. The vendor will be using scaffolding and a power lift for the duration of the project.

Some of the KHC main campus parking spaces may need to be blocked off during this project as well. Please use caution around the areas [highlighted in the campus map](#) during this project.

The weather may play a factor in the completion of the project; please watch the *NewsBrief* for updates.

If you have any questions or concerns, please contact [Brandy Lancaster](#) or any member of the Business Logistics team.

Save the Date! KHC All-Staff Meeting May 9



**WE
CAN'T
WAIT TO
SEE YOU.**

ALL STAFF MEETING

**CAPITAL PLAZA HOTEL
FRANKFORT, KY
10 A.M. - 3 P.M. MAY 17**

 **Register today and pick your lunch choice:**
<https://khcallstaffmeeting.flyah.co/>

Details are coming soon!

Accounting Deadlines



To expedite the processing of all expense reports, time sheets and invoices, please ensure that your submissions are through the entire approval process and sent to Accounting by the dates listed below.

Expense Reports

Expense reimbursement requests for March 2023 expenses are due **Monday, April 3, 2023**, to AccExpenseReports@kyhousing.org. Please review the [Expense Report Reminders Memo](#) on KHC Connect to help ensure the accuracy of information submitted.

Federal Time Sheets

March 2023 Federal Time Sheets are due **Wednesday, April 5**, to federaltimesheets@kyhousing.org. **All timesheets must be submitted before that date to meet final administrative billing deadlines.** If you have questions about the process, please contact Accounting. This process must be completed in a timely manner for KHC to receive reimbursements.

Invoices and Accounts Payable

All invoices and accounts payable vouchers for goods/services incurred through February 2023 must be submitted to [Tonya Sleet](#) by the close of business **Monday, April 10, 2023**.

Those working remotely may need to scan their submissions to [Accounting](#).

OneDrive is Coming to KHC

Technology Services is excited to announce that we will be transitioning from the H: Drive to OneDrive for cross-computer file access.

OneDrive is a cloud-based file storage and collaboration tool that's part of Microsoft 365 and will allow us to securely store and access our files from anywhere, at any time, on any device. With OneDrive, we'll also be able to collaborate more efficiently with each other, internally share files more easily, and improve our overall productivity.

To ensure a smooth transition, we'll be offering training for all staff on how to use OneDrive as well as what to expect during the migration. Training will be sent as migrations are scheduled.

In the meantime, the Service Desk will be available to answer any questions you have and provide support throughout the migration process.

Stay tuned for more updates on the migration timeline and how you can prepare for the transition.



Department News

New Managing Director for Business Logistics

Business Services is proud to announce Carrie Williams has been promoted to managing director of Business Logistics.

Carrie has a master's degree in education from Georgetown College and most recently held the position of business logistics administrator. As she said in her Getting to Know You article, she is originally from Henderson, Kentucky; loves to sing, play the piano and play games and trivia; has a photographic memory; and wanted to be a female Indiana Jones when she was little.

Should you need anything from Business Logistics, contact Carrie at cwilliams@kyhousing.org or submit a [Business Logistics Service Request](#).



KHC Secures \$14.3 Million for Homelessness Response

Kentucky Housing Corporation, in collaboration with our homelessness Continuum of Care partners, secured \$14.3 million in the U.S. Department of Housing and Urban Development's regular annual CoC funding round. Of the \$14.3 million, \$7.3 million will be administered directly by KHC.

The Kentucky Balance of State CoC was awarded 100 percent of its requests — 62 projects in all! This has never happened for us before and is pretty rare for all CoC competitions nationwide.

Kudos to Shaye, Kenzie, Curtis and the HCA Homeless Programs Team!

For more information, visit [HUD's site](#).

Employee News

KHC 2023 Bracketology Final Four Update

It's the final countdown!

Here are the standings entering into this weekend's Final Four match-ups. Everyone has reached their max point potential except for **Debbie Williams** and **Lori Davis**. Pending the results of the Final Four contests, we could see one or both of them move to the top of the rankings!

Even though the dance has already ended for most of us, Debbie and Lori are hoping the DJ will play one final song so they can walk away with this year's championship!

As always, you can track your standing on [CBS Sports](#).

| KHC Bracketologist | Current Points | Max Point Potential |
|--------------------------|----------------|---------------------|
| Charles (Scott) Sullivan | 39 | 39 |
| Greg Bodine | 39 | 39 |
| Jasmin Thurman | 38 | 38 |
| Keaton Kozar | 38 | 38 |
| Debbie Williams | 37 | 41 |
| Brandy Lancaster | 37 | 37 |
| Johnny Luckenbill | 37 | 37 |

| | | |
|-------------------|-----------|------------------------------|
| Jordan Vice | 37 | 37 |
| Justin King | 37 | 37 |
| Lori Davis | 33 | 42 - The one to watch |

This Week's Wow Wheel Winners



For this week's [Wow Wheel Wednesday](#), we selected the lowest-scoring March Madness brackets for a second chance at winning a prize. Congratulations to Tom Midkiff, Michele Byer, and Misty Tackett for being selected to spin.

Tom's spin won him a Speedway gift card, Michele's spin won her a Fandango gift card, and Misty's won her a DoorDash gift card!

Thanks to everyone who joined us or who tuned in.

As always, everyone is invited to [watch live](#) or to join the call — you can join by clicking the meeting link <https://8x8.vc/kentuckyh66/nathan.hall.zp5> or dialing +1 209-

844-4600,,95180300#.

The entire Wow Wheel process usually takes less than 10 minutes, and it is a fun break in your day. We hope to see you next time!

New SmartDollar Feature - File Your Taxes for Free!

If you are a participant in the [SmartDollar program](#), you can utilize a new feature and file state and federal tax returns for **free** with Ramsey SmartTax. *(An \$85 value now included with SmartDollar!)*



Ramsey SmartTax can guide you through it and give you what you need to e-file your federal and state tax returns for free. All the major federal forms and deductions are included. Plus, you'll have resources to help you get organized and feel confident about e-filing.

If you'd like to file your taxes with Ramsey SmartTax just find SmartTax under the Money Tools tab in SmartDollar to get started.

If you are not a current participant, you can enroll at anytime. Just email [Charlie Jane Currens](#) in Employee Services to request to join. There is no cost to you to participate, this is a free benefit to KHC employees.

Housing News Fair Housing Training



The **Kentucky Fair Housing Council**, the **Kentucky Commission on Human Rights**, and the **Kentucky Housing Corporation** are offering a free two-hour webinar designed for housing providers and social service providers. We will be

discussing general fair housing laws and answering any questions you might have. The training is designed for landlords, property managers, and service providers, but we welcome anyone who wants to learn about fair housing rights!

Join us from 10 a.m. to noon Wednesday, April 12, 2023. [Register here.](#)

We will be offering certificates for those who attend. Attendees who wish to receive a certificate from this training will be required to complete an online survey after the training.

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The News Brief

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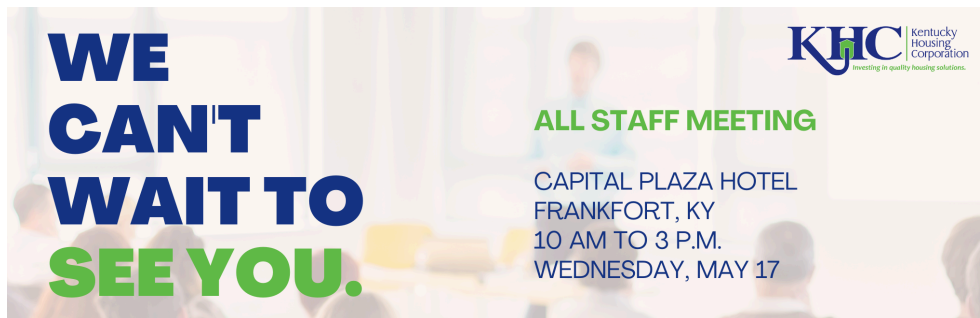
THURSDAY, APRIL 20, 2023

DAILY EDITION

"Find something you're passionate about and keep tremendously interested in it." ~Julia Child

Corporate News

KHC All Staff Meeting May 17 in Frankfort



Details

10 a.m. to 3 p.m.
Wednesday, May 17, 2023
Capital Plaza Hotel
405 Wilkinson Boulevard
Frankfort, KY 40601

Registration

Let us know you are coming! Already, 147 staff members have registered. Thanks!

Make sure you save your spot and select your lunch at <https://khcallstaffmeeting.flyah.co/>. Food will be provided by Fork Knife and Spoon Catering in Frankfort. **Please RSVP by Friday, April 28.**

Day-of registration begins at 9:30 a.m.

Hotel Accommodations

We know many staff are traveling for this event. If you need a hotel room, Capital Plaza will have a block for \$109 per night. Reserve a room by calling (502) 227-5100 or visiting www.capitalplazaky.com and using group code 5444.

Staff must pay for their own rooms and travel to the event or work with their supervisor to charge these costs to the staff member's departmental budget. Communications will not be covering these travel and lodging costs.

Agenda

The agenda is not confirmed yet, but it should be a fun and informative day. We will also have our selfie station there for group photos and a backdrop for official badge pictures.

- Quick introductions
- State of the corporation
 - Financial update
 - Programs update

- Goals for the future
- Networking
- Celebrating work anniversaries
- Departmental meetings
 - We have reserved several parks for group meetings and will have some space at KHC so departments can meet, discuss projects and plan for the future. **Managers and directors should contact [Communications](#) to reserve a spot.**

Top OneDrive Features

Technology Services is in the process of transitioning staff from the H: Drive to OneDrive for cloud-based file access. OneDrive is a cloud-based file storage and collaboration tool that's part of Microsoft 365, offering many features to help the Corporation work more efficiently and effectively.

One of the key features of OneDrive is the ability to easily collaborate with others on files. With OneDrive, you can share files with other KHC staff, set permissions to control who can view or edit the files, and even work on the same file at the same time. This is a game-changer for teams that need to collaborate on projects or documents. No more emailing files back and forth, and no more confusion about which version is the most up-to-date.



In addition to collaboration, OneDrive offers many other features to help us work smarter, not harder. You can access your files from any device, anywhere, at any time, and with automatic syncing to ensure you always have the most up-to-date version of your files. And with OneDrive's robust search functionality, you can easily find the files you need, when you need them.

We are offering training to help you get up to speed on how to use OneDrive and what to expect during the migration process. We encourage all staff to complete the training once your migration is scheduled, to ensure a smooth transition. And as always, the Service Desk will be available to answer any questions you have and provide support throughout the process.

We're excited about the many benefits that OneDrive will bring to KHC and we can't wait to share them with you! Stay tuned for more updates on the migration timeline and how you can prepare for the transition.

Department News

Technology Services Employee of the Month

Technology Services would like to recognize its Employee of the Month winners for Fiscal Year 2023.

We greatly appreciate all the hard work and time they have put in for KHC. Their dedication to their job and the goals and objectives of KHC help to elevate everyone. Thank you for all you do!

July 2022 – **Lisa Foster**

| | |
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August 2022 - **Kim Monroe**



September 2022 - **James Vivio**



October 2022 – **Rachel Reid**



November 2022 – **Arthur Whitehead**



December 2022 – **Justin King**



January 2023 – **David Carroll**



February 2023 – **Melba Darden**



March 2023 – **Scott Smith**



Employee News Getting to Know You



Getting to Know You is a chance to meet new faces and learn more about some of our veteran employees.

It is a fun way to keep us all connected and together though we are physically apart.

Have a burning question? Want to nominate someone to be profiled? Send your suggestions to [Communications](#), and we

will add it to the list.

Today's featured family member is **Sara Gibson** from the **Legal Services** team. Read more below.

- **Name:** Sara Gibson
- **Title:** Paralegal II/Board Liaison
- **Department:** Legal Services and Compliance
- **Birthplace:** Frankfort, Kentucky
- **City and State of Residence:** Frankfort, Kentucky
- **Hobbies:** Traveling, homesteading, reading
- **Favorite Food:** Pizza
- **One word that best describes me:** Passionate
- **Date of Hire:** January 28, 2019
- **Early bird or night owl:** Night owl
- **An interesting fact about me:** I played soccer at the collegiate level.
- **The last great movie or TV show I watched:** *1923*
- **My favorite quote or saying:** "If you don't like something, change it. If you can't change it, change the way you think about it."
- **What I wanted to be when I grew up:** Journalist
- **Someone I admire and why:** My dad. He always does the right thing, even when no one is watching.
- **What I am most proud of:** My children.
- **What brought you to KHC?** I was looking for growth in my career after 12 years with state government, and I had heard good things about the culture at KHC.
- **What I like best about working for KHC:** My co-workers and the work/life balance KHC provides.
- **A professional skill I would like to learn:** More a profession than a skill, but I would love to get my law degree.
- **My favorite piece of advice:** Where there's a will, there's a way.



Submit Your VIPs

Reward your coworkers for improving the corporation and furthering our strategic objectives!

The VIP (Valuing Individuals and Performance) Incentive Pay Program is a peer-to-peer monetary award program designed to recognize outstanding performance. Each KHC employee hired before March 1, 2023, is eligible to give and to receive VIP awards.

Each employee is given three \$75 VIP awards that they can give to another coworker (hired before March 1) for outstanding work related to KHC's corporate business strategies. **All three submissions must be in by May 31, 2023.**

A full description of the program, including criteria for awarding VIPs, is on [KHC's VIP page](#).

[Submit your three VIPs today!](#)

LivingWell: Show Yourself Some Love

April is National Stress Awareness month. When you work with a WebMD Health Coach, you can create a personalized plan to manage the everyday stress in your life. To learn more, check out our [WebMD Health Coach flyer](#).

PREVENTIVE HEALTH



Know Your Numbers

Once you know your numbers, find support through the WebMD portal. Check out the [What's Next flyer](#) with 15 action items you can start today to improve your health.

CALL TO ACTION

LivingWell Promise

Have you fulfilled your LivingWell Promise? Watch this [2-minute video](#) to learn how to earn up to \$480 a year in insurance premium discounts for 2024. As a reminder, the deadline is July 1, 2023.

DID YOU KNOW

Sync Your Steps

Did you know Apple Health and Google Fit can sync to the WebMD portal? If you need additional assistance, check out the [Syncing Android Devices video](#) or [Syncing Apple Device video](#).

Meet Your Goals

Watch this [2-minute video](#) to learn how [WebMD Health Coaching](#) works. As a reminder, you can earn up to \$50.*

WHAT'S IN IT FOR YOU

Invitational Step Challenge: How-To Webinar Series

Registration for the Invitational Steps Challenge ends on April 25. Make sure your fitness device is connected and you are putting together your Invitational Steps Team. [Register](#) for one of two 30-minute webinars to learn how to participate in the Invitational Steps Challenge. In this short webinar, you will learn how to:

- Register on the [WebMD portal](#) or the Wellness At Your Side app
- Create and/or join a team
- Connect a device
- Receive full benefit for participating in the Invitational Steps Challenge. Participants can earn up to \$25* in LivingWell Engagement rewards by participating in the challenge!

*Members and Spouses: As a reminder, you must complete your Health Assessment or biometric screening to begin earning Engagement rewards.

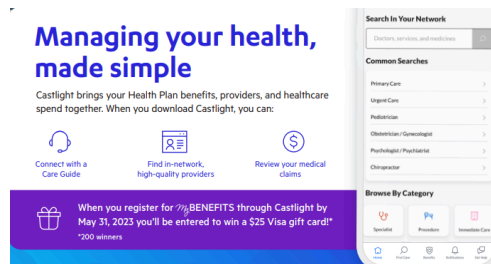
Introducing MyBENEFITS through Castlight

Introducing MyBENEFITS. Easily access your insurance benefits in one location through [Castlight](#).

We are very excited to share Castlight with you – a new resource **available to Kentucky Employees' Health Plan members**.

Castlight puts all your health benefits resources into the palm of your hand so that you can:

- Understand your benefits, see your healthcare spend, and view recent claims.
- Find quality, in-network providers near you.
- Estimate how much care will cost, before you see a doctor.
- Access your insurance card information from anywhere at anytime.
- Get one-on-one support from a Castlight Care Guide.



To get started, log in or register at [mycastlight.com/mybenefits](#) today and download the Castlight app for on-the-go access. Invite your spouse and any dependents age 18 or over to do the same!

You can find the [Castlight flyer](#) on KHC Connect. If you are a KEHP participant, you should have received an email from the Department of Employee Insurance on Monday afternoon relating to this announcement.

All KHC staff are responsible for the information contained in this message. KHC will not be liable for professional or financial losses incurred by employees who do NOT read this information source.

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The News Brief

KHC's Official Information Source

VOL : 23.152

THURSDAY, JUNE 1, 2023

DAILY EDITION

"As we express our gratitude, we must never forget that the highest appreciation is not to utter the words, but to live by them." ~John F. Kennedy

Corporate News

OneDrive Migration Continues



KHC's OneDrive migration is currently in progress for the Finance teams. This process will continue until all KHC staff have transitioned to cloud-storage, team-by-team. The Service Desk is available to assist with any questions or issues, and we appreciate your cooperation as we work to transition your data from the H: drive to OneDrive.

For those who have not yet had their data migrated, we will be reaching out to you when it's your time to begin the training and migration process. Technology Services will continue the migration in stages, with different groups of users being transitioned in waves.

This will be a two-day process that will halt backups until OneDrive is active on your machine. It is imperative to complete the migration as quickly as possible once you begin. The entire process will require less than two hours from staff being migrated.

If you have any questions or concerns, please reach out to the [Service Desk](#) or your manager. We hope to make this transition as seamless as possible for everyone.

Accounting Deadlines



To expedite the processing of all expense reports, time sheets and invoices, please ensure that your submissions are through the entire approval process and sent to Accounting by the dates listed below.

Expense Reports

Expense reimbursement requests for May 2023 expenses are due **Friday, June 2**, to AccExpenseReports@kyhousing.org. Please review the [Expense Report Reminders Memo](#) on KHC Connect to help ensure the accuracy of information submitted.

Federal Time Sheets

May 2023 Federal Time Sheets are due **Friday, June 9**, to federaltimesheets@kyhousing.org. **All timesheets must be submitted before that date to meet final administrative billing deadlines.** If you have questions about the process, please contact Accounting. This process must be completed in a timely manner for KHC to receive reimbursements.

Invoices and Accounts Payable

All invoices and accounts payable vouchers for goods/services incurred through May 2023 must be submitted to [Tonya Sleet](#) by the close of business **Friday, June 9, 2023**.

Those working remotely may need to scan their submissions to [Accounting](#).

Mileage Reimbursement Rate

The reimbursement rate for KHC business use of a personal vehicle is \$0.46 per mile, effective June 1, 2023. Please contact [Michael Bianco](#) with any questions.

Department News

Share Your Photos for National Homeownership Month

National Homeownership Month begins today! Thank you to all of the people throughout the organization who help promote homeownership opportunities!

This month, we are going to post testimonials on social media showing the benefits of homeownership. Help us!

Was it to have a yard for your dog, more room for your family, a place to garden? Did you simply want to paint your walls something other than sterile white?

Submit your reasons for your mortgage through [this form](#).

After years of renting apartments without enough space for a dog, I finally saved enough to mortgage a house with a yard and adopted this sweet girl



14K

517 comments 962 shares

Diversity, Equity, and Inclusion Ways to Engage with the DEI Panel



KHC's Diversity, Equity, and Inclusion Panel wants to ensure all staff know what we are doing and have an opportunity to participate. We know that many of you are invested in this initiative. You want to embrace this change and help the effort succeed.

Moving forward, we will offer staff several ways to engage with the panel.

Meetings

All DEI Panel meeting dates and times will be posted on the [IDEAS page](#). Each meeting will have a 10-minute public comment period, where staff can join the meeting to share their ideas, thoughts, concerns, or questions. **The next meeting is 10:30 a.m. today, Thursday, June 1.**

Staff Submissions

Employees are also invited to engage with the page – submit book and movie suggestions, share your family recipes, and add dates and events to the calendar. Send your submissions to Team-DEIPanel@kyhousing.org.

Free Webinar: An Inclusive Workforce: What It Is and Why It Matters to Kentucky

A blue banner with a circular pattern on the left side. On the right, there are logos for Kentucky Chamber, KYSHRM, SIRM, RETAIN KENTUCKY, and Kentucky Career Center. Below the logos, the text reads: "An Inclusive Workforce", "What It Is and Why It Matters to Kentucky", "FREE WEBINAR", and "June 15, 2023 | 1:00-2:00 p.m. ET".

Kentucky Chamber KYSHRM SIRM presented by RETAIN KENTUCKY Kentucky Career Center Career Training Employer

An Inclusive Workforce

What It Is and Why It Matters to Kentucky

FREE WEBINAR

June 15, 2023 | 1:00-2:00 p.m. ET

Retain Kentucky and Kentucky Career Center will present "An Inclusive Workforce: What it is and why it matters," a free webinar, from 1-2 p.m. ET June 15, 2023. Speakers will include Beth Brinly, deputy secretary of the Kentucky Education and Labor Cabinet, Johnny Collett, deputy director at the University of Kentucky's Human Development Institute (HDI), Amy Luttrell, president and CEO of Goodwill Industries of Kentucky, and others. They will discuss the concept of "inclusion" and why it should matter to every organization.

Register for this free webinar [here](#).

Employee News

Extended for one day! Submit Your VIPs

We extended the deadline!

Reward your coworkers for improving the corporation and furthering our strategic objectives!

The VIP (Valuing Individuals and Performance) Incentive Pay Program is a peer-to-peer monetary award program designed to recognize outstanding performance. Each KHC employee hired before March 1, 2023, is eligible to give and to receive VIP awards.

Each employee is given three \$75 VIP awards that they can give to another coworker (hired before March 1) for outstanding work related to KHC's corporate business strategies. **All three submissions must be in by close of business TODAY, JUNE 1.**

A full description of the program, including criteria for awarding VIPs, is on [KHC's VIP page](#).

[Submit your three VIPs today!](#)



All KHC staff are responsible for the information contained in this message. KHC will not be liable for professional or financial losses incurred by employees who do NOT read this information source.