



COUNTY OF SAN MATEO
Inter-Departmental Correspondence
Information Services



Date: June 11, 2014
Board Meeting Date: July 15, 2014
Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors

From: Jon Walton, CIO/Director Information Services Department

Subject: Agreement with Okta, Inc.

RECOMMENDATION:

Adopt a Resolution authorizing an agreement with Okta, Inc. for identity management and directory consolidation subscription services for the term of July 21, 2014, through July 20, 2017, in an amount not to exceed \$833,300.

BACKGROUND:

Directory services, or databases with County workforce contact and password credentials, have been traditionally locally stored on County servers. Eighty percent of County departments' directory information is housed in the main directory and the remainder of information is stored within several other individualized departmental directories. To date, this system has functioned for the operation of Countywide applications because most of those applications were hosted within the County.

With the implementation of multiple Countywide cloud based software services such as Workday, Office 365, and Yammer there is a greater need for the County to present consistent and accurate information to these applications. This cannot be achieved with multiple and potentially conflicting directories. The County now requires a single directory so that workflows like employee on-board and off-boarding happen at a single uniform organizational level rather than at the departmental level.

DISCUSSION:

Okta, Inc. would act as a cloud-based meta-directory repository or collection of directories for all of the directory services within the County. While consolidating the directory services within the County remains the long term goal, challenges such as legal compliance with Department of Justice (DOJ) rules for the Sheriff still need to be overcome. The Okta solution will allow ISD to present San Mateo County as a unified directory while these internal and external challenges are solved. The solution offered

by Okta, Inc. also allows the directory consolidation project to move forward without delay due to individualized departmental requirements.

New forthcoming services such as the ITSM/Service desk tool will also be able to utilize the Okta solution and it will allow information to flow seamlessly from Workday into the ITSM/service desk and Office 365 thus allowing for more efficient workflow processes. Okta also allows for greater security with cloud-based applications by introducing two-factor authentication. Using this authentication system, critical systems hosted in the cloud can remain secure. Finally, Okta will also allow a rich self-service password reset tool so that users can help themselves rather than have to wait for a service desk technician to be available to assist them.

ISD requests waiving the Request for Proposals (RFP) process because of the unique relationship Okta has formed with Workday, Office 365, and most of the major ITSM vendors. Okta certifies that any upgrades done to those products will also be performed in Okta so that connectivity and functionality between the impacted systems will remain consistent. This represents less risk to the County and ultimately more productivity and lower costs if all systems co-exist and consistently remain available for use.

The Contractors have assured compliance with the County's Contractor Employee Jury Service Ordinance, as well as all other contract provisions that are required by County ordinance and administrative memoranda, including but not limited to insurance, hold harmless, non-discrimination and equal benefits.

County Counsel has reviewed and approved the agreement and Resolution as to form.

ISD requests that your Board authorize the Chief Information Officer or his/her designee to execute subsequent amendments which do not exceed an aggregate of \$25,000.

This agreement supports the Shared Vision 2025 outcomes for a Collaborative Community by consolidating the directories in an expeditious manner that will also help customers meet their goals on time and on budget.

PERFORMANCE MEASURE(S):

Measure	FY 2012-13 Actual	FY 2014-15 Projected
Percent of medium and large projects completed on time and on budget and with a customer satisfaction rating of good or better	81%	75%

FISCAL IMPACT:

The term of the Agreement is from July 21, 2014 through July 20, 2017. The total not to exceed amount of the agreement is \$833,300. The funding for this Agreement is included in ISD's Fiscal Year 2014-15 Recommended Budget and will be included in future year's budgets through inclusion in the core charge to all departments.