



Memorandum

Date: 10/18/2022  
Meeting of: City Council

File No. AM No. 22-151  
Type: Consent Item

TO: Members of the City Council  
FROM: Mayor Angela Birney  
DEPARTMENT DIRECTOR CONTACT(S):

Finance	Chip Corder	425-556-2189
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DEPARTMENT STAFF:

Finance	Kelley Cochran	Deputy Finance Director
Finance	Jay Freeland	Business Systems Analyst Senior
TIS	Dawn Johnson	Project MGMT Office Manager
TIS	Wanda Norman	Technology Project Manager

TITLE:

Approval of a Consultant Agreement with Dynamic Solutions Incorporated in the Amount of \$123,600 to Provide Resource Development and End User Training to Support the Implementation of Dynamics 365 (D365)

OVERVIEW STATEMENT:

The City is implementing a replacement of the current financial system early next year. The contract with Dynamic Solutions Incorporated will provide City staff with the resources and training necessary to ensure the implementation is successful. Microsoft launched the Dynamics 365 (D365) suite of business systems in 2016. D365 for Finance and Operations replaces the City’s current Dynamics AX finance solution. The upgrade moves the City’s finance solution to the cloud and provides increased opportunities for modernization and streamlining of a broadened scope of finance-related business processes, systems integration and data analytics.

Deana Davis of Dynamic Solutions is uniquely qualified to address the training needs of the City’s for the implementation. She has trained specifically for Microsoft Dynamics from version 1 to present and has worked directly with the City’s support partners in previous engagements. The training materials that are developed as a part of this contract will be utilized going forward to train new and existing staff and to continue good stewardship of the City’s financial data.

Additional Background Information/Description of Proposal Attached

REQUESTED ACTION:

- Receive Information
- Provide Direction
- Approve

REQUEST RATIONALE:

- **Relevant Plans/Policies:**  
Business Technology Investment Program (BTIP)
- **Required:**  
Council approval is required for contracts over \$50,000.
- **Council Request:**  
N/A
- **Other Key Facts:**  
N/A

**OUTCOMES:**

The primary objective is train City staff on the new D365 system. The training will:

- Provide relevant information and explanations of how to navigate through the D365 system.
- Develop ownership and buy-in from employees and stakeholders.
- Increase the efficiency of work for the end users.

Topics to be covered are as follows:

- D365 Introduction - Intro to Dynamics
- Procure to Pay - Purchasing
- Invoices - Invoice Submission
- ALE's - Posting ALEs
- AR - Invoicing Customers
- AR - Receiving Funds
- CIP/Operational Projects - CIP/Operational Projects in D365

The following training and materials to be provided for each topic (outlined above) as follows:

- Interactive Training Classes
- Recorded Training Class Sessions
- Interactive Training Video's
- Reference Guides
- FAQs

**COMMUNITY/STAKEHOLDER OUTREACH AND INVOLVEMENT:**

- **Timeline (previous or planned):**  
N/A
- **Outreach Methods and Results:**  
N/A
- **Feedback Summary:**  
N/A

**BUDGET IMPACT:**

**Total Cost:**  
\$123,600

**Approved in current biennial budget:**       **Yes**       **No**       **N/A**

**Budget Offer Number:**

Included in the six-year Business Technology Investment Program (BTIP)

**Budget Priority:**

Strategic and Responsive

**Other budget impacts or additional costs:**       Yes               No               N/A

**If yes, explain:**

N/A

**Funding source(s):**

Business Technology Investment Program (BTIP)

**Budget/Funding Constraints:**

N/A

Additional budget details attached

**COUNCIL REVIEW:**

**Previous Contact(s)**

Date	Meeting	Requested Action
10/11/2022	Committee of the Whole - Finance, Administration, and Communications	Provide Direction

**Proposed Upcoming Contact(s)**

Date	Meeting	Requested Action
N/A	None proposed at this time	N/A

**Time Constraints:**

D365 will be implemented early in 2023, the development of training materials must begin soon to ensure the training required for a successful implementation is provided.

**ANTICIPATED RESULT IF NOT APPROVED:**

If the contract is not approved the training would be provided by City staff. This would lead to a delay of the implementation in order to allow time to develop the needed materials and conduct trainings. This approach could also result in less comprehensive training leading to; lack of understanding of new processes affecting productivity levels, increased stress from staff of not knowing how to work in the new system and more time needed to provide follow-up training.

**ATTACHMENTS:**

Attachment A - Statement of Work