APEX DIGITAL SOLUTIONS | Microsoft Solutions Partner

OLHSA
A Community Action Agency

MICROSOFT 365 ASSESSMENT SUCCESS STORY

Oakland Livingston Human Service Agency



ABOUT THE ORGANIZATION

Oakland Livingston Human Service Agency (OLHSA) is a 300+ user Michigan nonprofit human services organization with an annually operating budget of $26M+ serving over 9000 Oakland and Livingston County residents annually.

THE CHALLENGE

Limited budget and bandwidth made it hard for OLHSA to modernize Microsoft 365, even as the need for a dependable, well-managed environment grew more urgent.

OLHSA was awarded an Apex Digital 2025 Technology Empowerment Grant, which included $10,000 of in-kind services for a Microsoft 365 Assessment.

WHAT WE ASSESSED

Apex Digital delivered a Microsoft 365 Assessment focused on clarity, prioritization, and long-term maintainability, including review of:

- Licensing alignment
- Identity and access best practices
- Backup and recovery readiness planning
- Connected apps and integrations
- Data retention and data lifecycle guidance
- High-level future planning topics, including phone modernization (outside formal assessment scope)

"Working with Apex Digital on the Microsoft 365 assessment was extremely useful and educational. The findings were clear and concise, and the way the team laid out priorities made it easy to understand what to focus on and where to allocate resources. In today's world, I think this kind of assessment is critical for nonprofits, because without that clarity and oversight, organizations can get themselves into serious trouble down the road."



Brad Michaud, CFO, OLHSA

TOP FINDINGS

- Opportunities to better align Microsoft 365 licensing and configuration so the environment is easier to manage consistently
- A need for a phased plan to modernize how sign-ins and user accounts connect across on-site and cloud systems
- Readiness planning needed to clarify backup and recovery approach for Microsoft 365 data
- A recommendation to simplify connected apps/integrations to reduce long-term complexity
- A roadmap-level view of future modernization opportunities, including Microsoft-based phone adoption

OLHSA IS NOW BETTER POSITIONED TO PROTECT DATA AND PLAN IMPROVEMENTS.

KEY OUTCOMES

- A clearer set of priorities to guide what to address first, what can wait, and how to sequence improvements over time
- Stronger planning to protect continuity of services by clarifying recovery expectations and backup approach for Microsoft 365 data
- Better positioning to safeguard donor and client information by aligning Microsoft 365 best practices with how the organization operates
- Reduced long-term complexity through a more manageable Microsoft 365 environment and clearer standards for how it is maintained



MICROSOFT 365 TOOLS REVIEWED DURING THE ASSESSMENT

- Microsoft Entra ID (identity and access)
- Microsoft Intune (endpoint and mobile management considerations)
- Microsoft Defender (security best-practice considerations)
- Microsoft 365 Apps and core collaboration workloads (Teams, Exchange, SharePoint)



See what a Microsoft 365 Assessment could look like for you.

Book your free consultation today.

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