



COUNTY TECH  
XCHANGE

# Chart Your Course: Real Stories of Counties Advancing with AI Online Learning

Thursday, May 29, 2025 | 1:00pm ET

## Zoom Housekeeping



- Be sure to mute yourself
- Be sure to use the chat to ask questions
- If we can call on you to ask your question, please turn on your video
- Once you enter the meeting, click the three dots, and click "Rename" (be sure to add your county / organization)





## **Raymond Burns**

*Senior Manager, Office of Innovation  
Harris County Universal Services, Texas*



# HARRIS COUNTY UNIVERSAL SERVICES

Presented by HCUS Office of Innovation

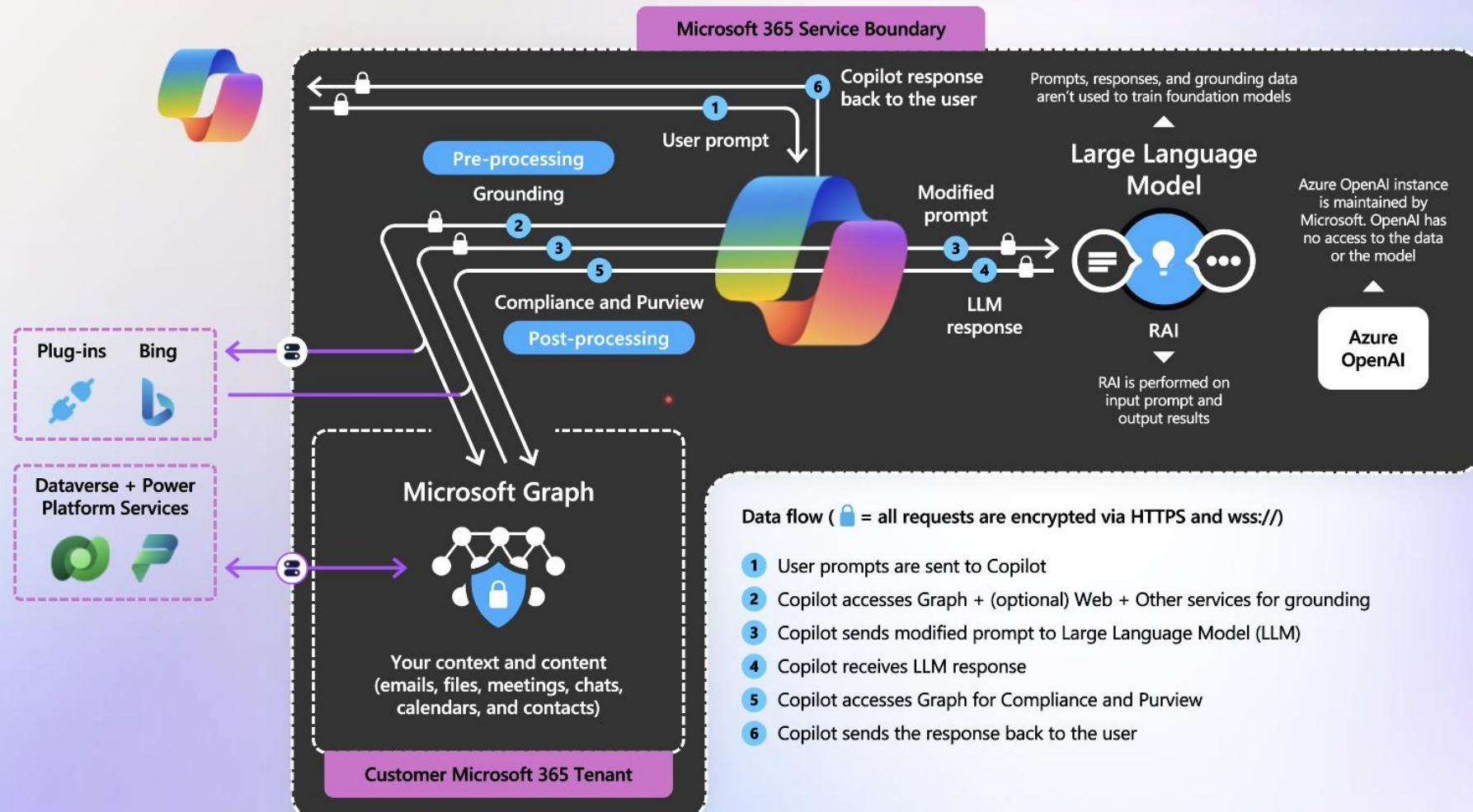
# Overview of Copilot

## Framework for Deployment

- Get Ready
  - Identify success metrics
  - Identify user cohorts
- Prep the Environment
  - Implement Data Governance in parallel
  - Establish a Champion program
  - Build upskill opportunities
- Deliver and Optimize
  - Validate Business Cases
  - Collect feedback
  - Leverage Champion community



# Copilot for Microsoft 365 Architecture



Understanding the Copilot Framework  
Copilot Architecture





# Upskilling Through Learn

## Customizable Learning Paths

- Organizations can tailor Microsoft Learn to align with their specific needs, offering curated training modules that match business goals and employee roles.

The screenshot shows the Microsoft Learn interface. At the top, there's a navigation bar with the Microsoft logo, the word "Learn", and several dropdown menus: "Discover", "Product documentation", "Development languages", and "Topics". Below this, the page title "Essential Training for Microsoft Copilot Licensing" is displayed in large, bold white text on a dark blue background. Under the title, it says "1 milestone". A paragraph of text describes the training program as mandatory for Harris County employees, aimed at developing skills in Microsoft Copilot. At the bottom of the page, there's a footer with the text "Published on 3/17/2025 • Created by BJ Burns Jr., Raymond (US)". Below the footer, there are four icons with labels: "Share", "Copy", "Edit", and "Manage".

Learn Discover Product documentation Development languages Topics

PLAN

## Essential Training for Microsoft Copilot Licensing

1 milestone

This mandatory training program is tailored for Harris County employees to develop key skills and knowledge in Microsoft Copilot. Through interactive modules and practical exercises, participants will learn to maximize Copilot's AI-powered features to boost productivity and streamline workflows. Successful completion of this course is required to obtain the official license, granting employees access to this innovative tool, ensuring seamless integration into their daily roles across Harris County departments.

Published on 3/17/2025 • Created by BJ Burns Jr., Raymond (US)

Share Copy Edit Manage



# Upskilling Through Learn

## Certificate Tracking for Compliance

- Harris County utilizes Learn to monitor completed training certificates, ensuring employees meet compliance for Copilot AI License assignment.

### Invite learners

#### 👤 Individuals

🔗 Copy invite link    ✉ Email

#### 👥 Groups

A learning group is a name that allows you to identify a group of learners in your progress report; learners will not see this name.

Creating a learning group generates a unique link to your plan for the specific group of learners.





# Upskilling Through Learn

## Extensive Training Library

- Microsoft has a vast collection of interactive lessons beyond Microsoft Copilot.
- Harris County is implementing training compliance for license assignments, developers, and federated software managers.

A screenshot of the Microsoft Learn training library interface. The interface is dark-themed. On the left, there is a "Filter" sidebar with sections for "Products" and "Roles". The "Products" section has a search bar and a list of checkboxes for various technologies like .NET, Azure, and Dynamics 365. The "Roles" section has a search bar and a list of checkboxes for roles like Administrator. At the top right, there is a search bar with the text "Search" and a magnifying glass icon. Below the search bar, the text "4,588 results" is displayed, circled in red with a red arrow pointing to it. To the right of the results count, there is a "Sort by: Popular" dropdown menu. The main area of the interface displays a grid of training modules. Each module card includes a title, a duration (e.g., 12 min, 21 min), a target audience (e.g., Azure Administrator Beginner), and an "Add" button. The modules shown include "Describe cloud service types", "Get started building with Power BI", "Microsoft Azure Fundamentals: Describe cloud concepts", "Describe the benefits of using cloud services", "Introduction to AI concepts", "Introduction to generative AI concepts", "Get started with Azure AI services", and "Describe cloud computing".

*Questions?*



## **Erica Ally**

*Manager, Organizational Change Management  
Project Management Office, Cook County, Ill.*



**COOK COUNTY**  
**BUREAU OF**  
**TECHNOLOGY**

**NACo**  
**Chart Your Course**

# Cook County's AI Learning Journey

Presented by Erica Ally  
Manager, Organizational Change Management  
Project Management Office





COOK COUNTY  
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# Cook County Government Demographics



**Cook County** is the 2<sup>nd</sup> largest county in the US and the heart of the nation's 3<sup>rd</sup> largest metropolitan area.

Over 5.2 million residents



**Cook County Government** is comprised of 10 separately elected officials and other appointed and independent agencies, all with their own personnel and departments.

Over 22,000 employees



**Offices Under the President** represents 6 bureaus and additional independent offices that report directly to the Cook County Board President.

Over 2,600 employees



**Bureau of Technology** is the central office that handles enterprise technology, all tech needs for OUP and concurrence for all other offices.

Over 175 employees



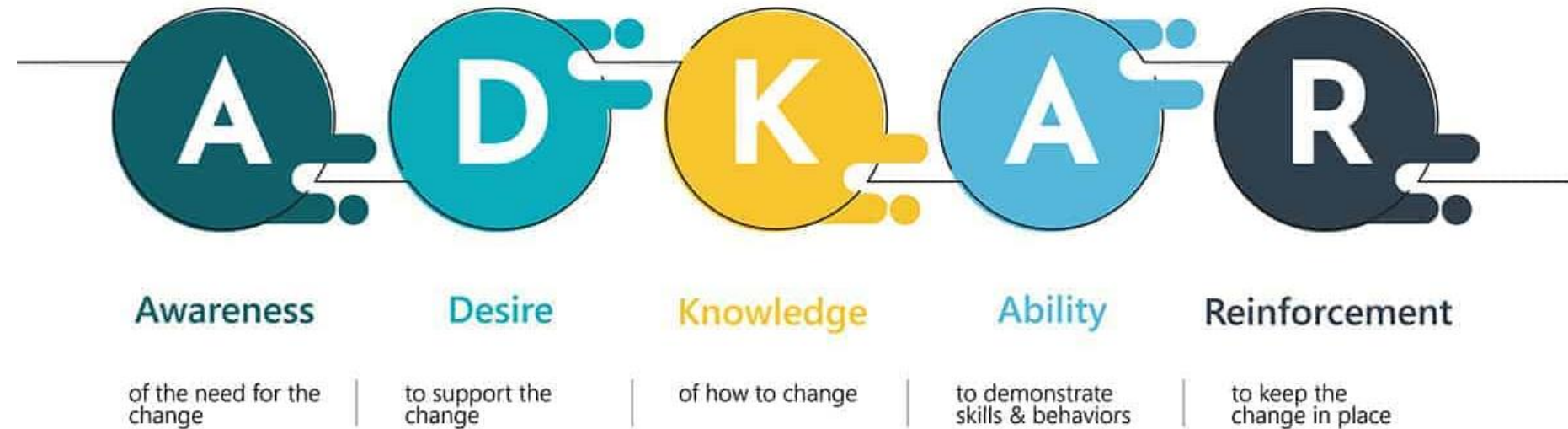
# Bringing AI to Cook County





# Change Management Perspective

## ADKAR model



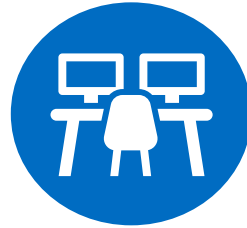


# Goals for AI Skill Development



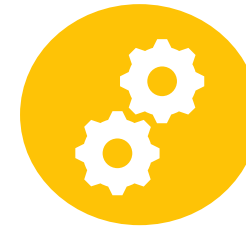
## General Awareness

- Governance
- Ethics
- Defining AI
- Terminology
- Professional vs. personal usage



## Working Knowledge

- Policy
- Best practices
- AI by role
- Prompt engineering



## Expert Tool Support

- Mastery of specific tool
- System Admin functions
- Internal troubleshooting





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# Training Options

## Our Tools



LinkedIn Learning

Manufacturer  
Software  
Training

Customized  
Internal Training

*Questions?*





## **Rita Reynolds**

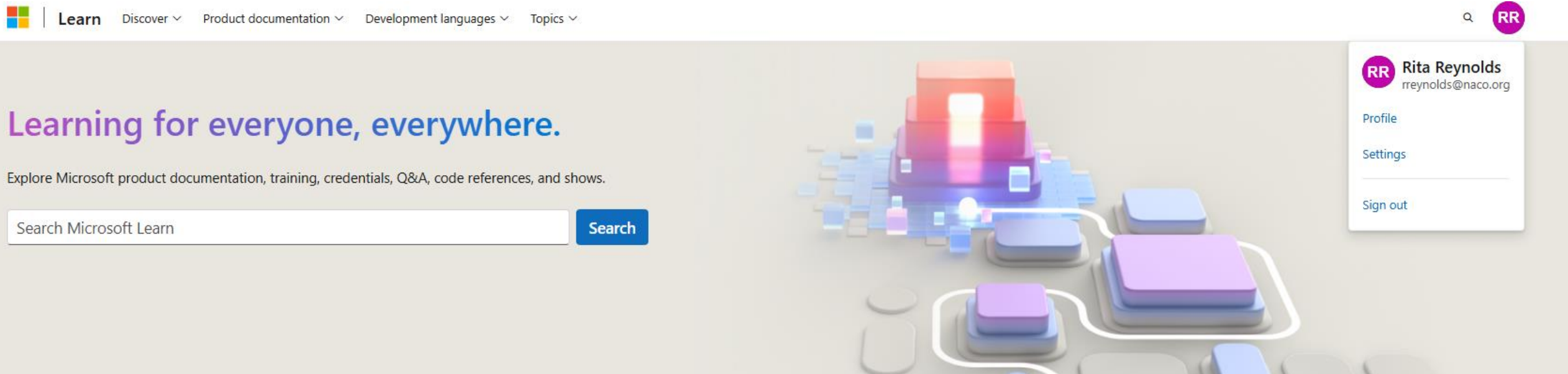
*CIO and Managing Director of Technology Programs  
National Association of Counties (NACo)*

# How to Set Up a Plan and Monitor Progress

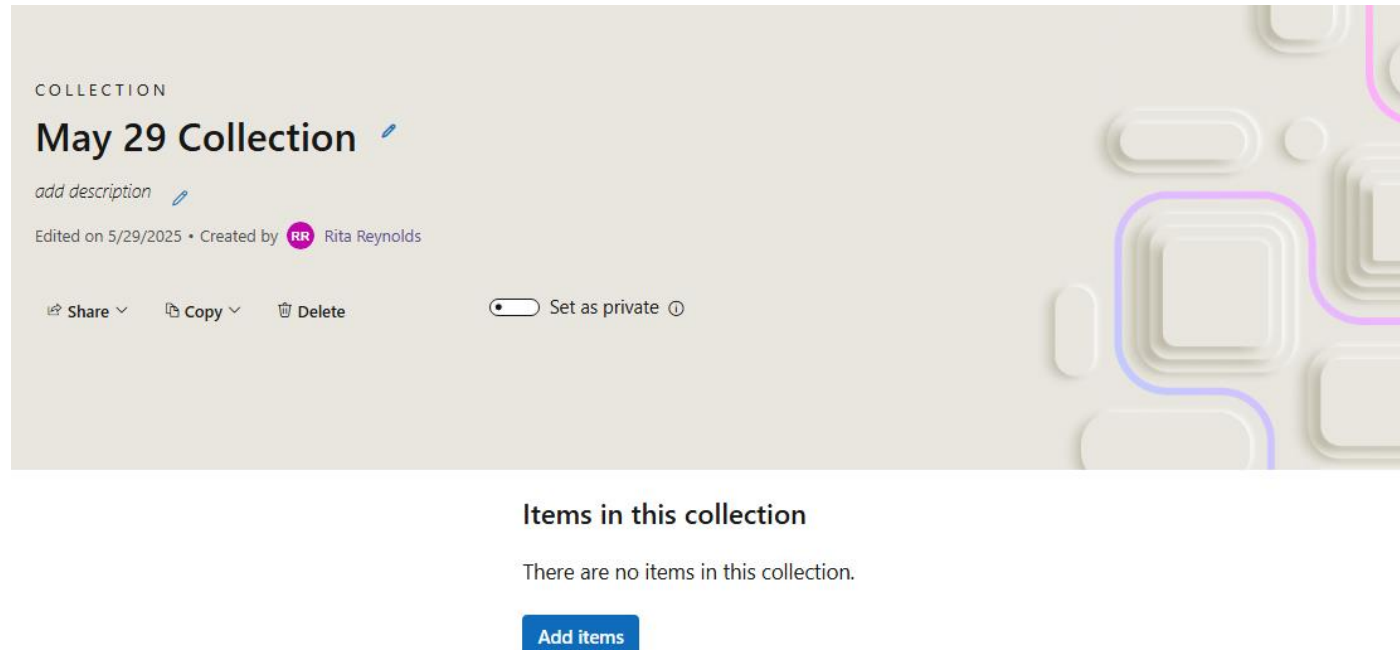


# How to Set Up a Microsoft Plan

1. **Logon to Microsoft Training Portal - <https://learn.microsoft.com/en-us/>**
  - Sign-in. You may need to create a Microsoft account. There is no fee to do this.
2. **Click on your Profile in the right-hand corner**



3. **Select Collections in the left Navigation**
4. **Select “Create New Collection**
5. **Name the collection – Now you are ready to add items to the collection**



6. Select “Add Item”

7. Search for a course. I searched for “Basic AI”

8. Select “Explore AI Basics”

The screenshot displays the Microsoft Learning portal interface. At the top, a banner reads "Browse all training" with a subtext: "Learn new skills and discover the power of Microsoft products with step-by-step guidance. Start your journey today by exploring our learning paths and modules." Below the banner is a search bar containing the text "basic AI" and a "Search" button. To the left of the search bar is a "Filter" section with a "Hide completed" checkbox and a "Products" list including Azure, Dynamics 365, GitHub, Microsoft 365, and Microsoft Copilot. Below the search bar, the results are sorted by "Popular" and show "26 results for 'basic AI'". Four results are visible: "Introduction to AI in Azure" (Course, 1 Day, Azure • AI Engineer • Beginner), "Introduction to prompt engineering with GitHub Copilot" (Module, 30 min, GitHub • Developer • Beginner), "Explore AI basics" (Module, 58 min, Azure • Developer • Beginner, 12% progress), and "Microsoft Azure Data Fundamentals" (Course, 1 Day, Azure • Data Engineer • Beginner). A blue arrow points from the text "Select 'Explore AI Basics'" to the "Explore AI basics" module card.

**Browse all training**

Learn new skills and discover the power of Microsoft products with step-by-step guidance. Start your journey today by exploring our learning paths and modules.

**Filter**

☐ Hide completed

**Products**

Find a product

- ☒ Azure
- ☒ Dynamics 365
- ☐ GitHub
- ☒ Microsoft 365
- ☐ Microsoft Copilot

**basic AI** **Search**

26 results for "basic AI" **Sort by: Popular**

**COURSE**  
**Introduction to AI in Azure**  
1 Day  
Azure • AI Engineer • Beginner **Add**

**MODULE**  
**Introduction to prompt engineering with GitHub Copilot**  
30 min  
GitHub • Developer • Beginner **Add**

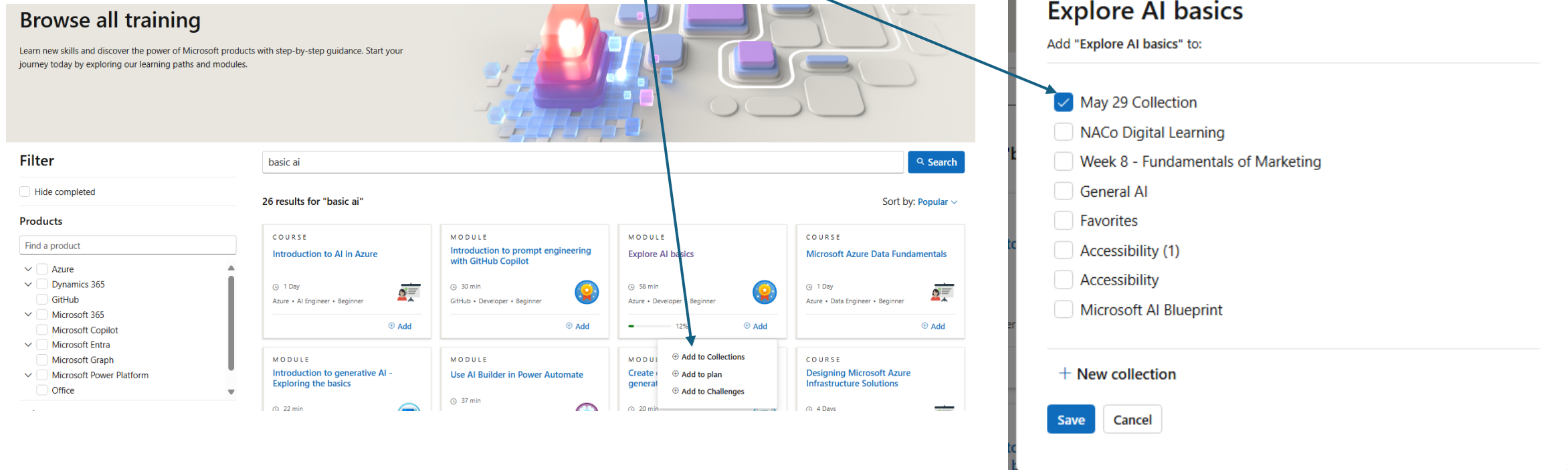
**MODULE**  
**Explore AI basics**  
58 min  
Azure • Developer • Beginner **Add** 12%

**COURSE**  
**Microsoft Azure Data Fundamentals**  
1 Day  
Azure • Data Engineer • Beginner **Add**

## 9. Select “Add Item”

## 10. Click on “Add to Collections” and select your collection (I named mine May 29 Collection)

## 11. Click on Save



The screenshot displays the Microsoft Learning portal interface. At the top, there's a banner for 'Browse all training' with a search bar containing 'basic ai' and a 'Search' button. Below the banner, a filter sidebar on the left shows 'Products' with a list of items including Azure, Dynamics 365, GitHub, Microsoft 365, Microsoft Copilot, Microsoft Entra, Microsoft Graph, Microsoft Power Platform, and Office. The main content area shows '26 results for "basic ai"' with a 'Sort by: Popular' dropdown. A grid of course and module cards is displayed. One card, 'Explore AI basics' (Module), is highlighted with a blue border. A context menu is open over this card, showing options: 'Add to Collections', 'Add to plan', and 'Add to Challenges'. A blue arrow points from the 'Add to Collections' option to a separate dialog box on the right. This dialog box, titled 'Explore AI basics', contains the text 'Add "Explore AI basics" to:' followed by a list of collections with checkboxes. The 'May 29 Collection' is checked. Other collections listed are 'NACo Digital Learning', 'Week 8 - Fundamentals of Marketing', 'General AI', 'Favorites', 'Accessibility (1)', 'Accessibility', and 'Microsoft AI Blueprint'. At the bottom of the dialog are '+ New collection', 'Save', and 'Cancel' buttons.



**12. Return to the navigation and selection Collections and select your new Collection**

**13. Click on Copy and add this to a Plan, and add at least one Outcome, include days to complete and click on Create**

Learn /

COLLECTION

**May 29 Collection**

add description

Edited on 5/29/2025 • Created by Rita Reynolds

Share Copy Delete Set as private

Items in this collection

MODULE

**Explore AI basics**

58 min

12% completed

Section

A plan allows learners to progress through a set of milestones to achieve learning outcomes. You can invite learners to your plan and track their progress.

Title

May 29 Collection

Description (optional)

Learning outcomes

A learning outcome is specific knowledge, skills, or expertise that the learner will get from completing this plan.

Tip: Begin each learning outcome with a verb. Each outcome should finish the sentence "Upon completion of this plan, learners will be able to..."

Outcome 1

To educate staff on AI basics. This is a requirement to receive a Generative Tool license (i.e. Copilot)

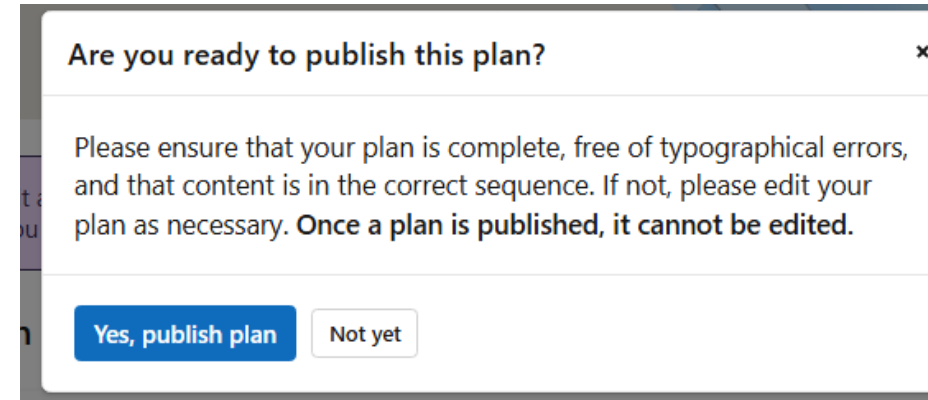
Outcome 2 (optional)

Outcome 3 (optional)

Create Cancel

# How to Set Up a Microsoft Plan

**14. You can now click publish (once you select publish you cannot make any changes)**

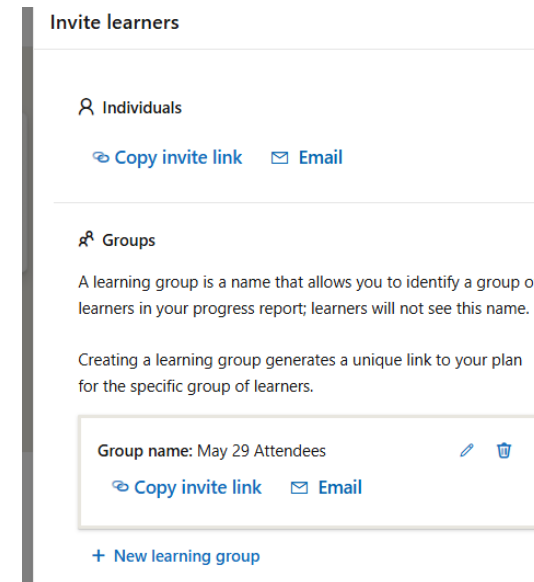


Are you ready to publish this plan? ×

Please ensure that your plan is complete, free of typographical errors, and that content is in the correct sequence. If not, please edit your plan as necessary. Once a plan is published, it cannot be edited.

[Yes, publish plan](#) [Not yet](#)

**15. Now click on Manage and select “Invite Learners”. You can copy the invite link or you can email the invite link to those you want to take the course.**



Invite learners ×

[Individuals](#)

[Copy invite link](#) [Email](#)

[Groups](#)

A learning group is a name that allows you to identify a group of learners in your progress report; learners will not see this name.

Creating a learning group generates a unique link to your plan for the specific group of learners.

Group name: May 29 Attendees [✎](#) [✕](#)

[Copy invite link](#) [Email](#)

[+ New learning group](#)


1. Return to the Plan and click on Manage
2. Click on View Progress – You can now see who has started and complete the plan.

PLAN

## May 29 Collection

1 milestone

[add description](#)


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[Start](#) [Share](#) [Copy](#) [Delete](#) [Manage](#)

1 milestone in this plan

MILESTONE 1

Milestone 1

 Days to milestone: 30

MODULE

[Explore AI basics](#)

58 min

#### Learning outcomes

- To educate staff on AI basics. This is a requirement to receive a Generative Tool license (i.e. Copilot)

0  
Started

0  
In progress

0  
Completed

Download this file to view a list of learners and their progress.

[Download CSV](#)

The file contains the following information:

- Learner group
- Learn username
- Start date
- End date
- Items completed
- Items total

**Thank you for attending!**