



# **City and County of San Francisco**

Committee on Information Technology

## **Budget and Performance Subcommittee Weekly Meeting February 13, 2026**

# Agenda

1. Call to Order by Chair
2. Roll Call
3. General Public Comment
4. Department Updates and Announcements
5. Approval of the Meeting Minutes from January 30, 2026
6. FY 2026-28 Technology Project Proposals Presentations
7. Adjournment

# Item Number 3

## General Public Comment

Discussion Item

# Item Number 4

## Department Updates and Announcements

Discussion Item

# Item Number 5

Approval of Minutes from January 30, 2026

Action Item

# **Item Number 6**

Fiscal Year 2026-28

Technology Project Proposals Presentations

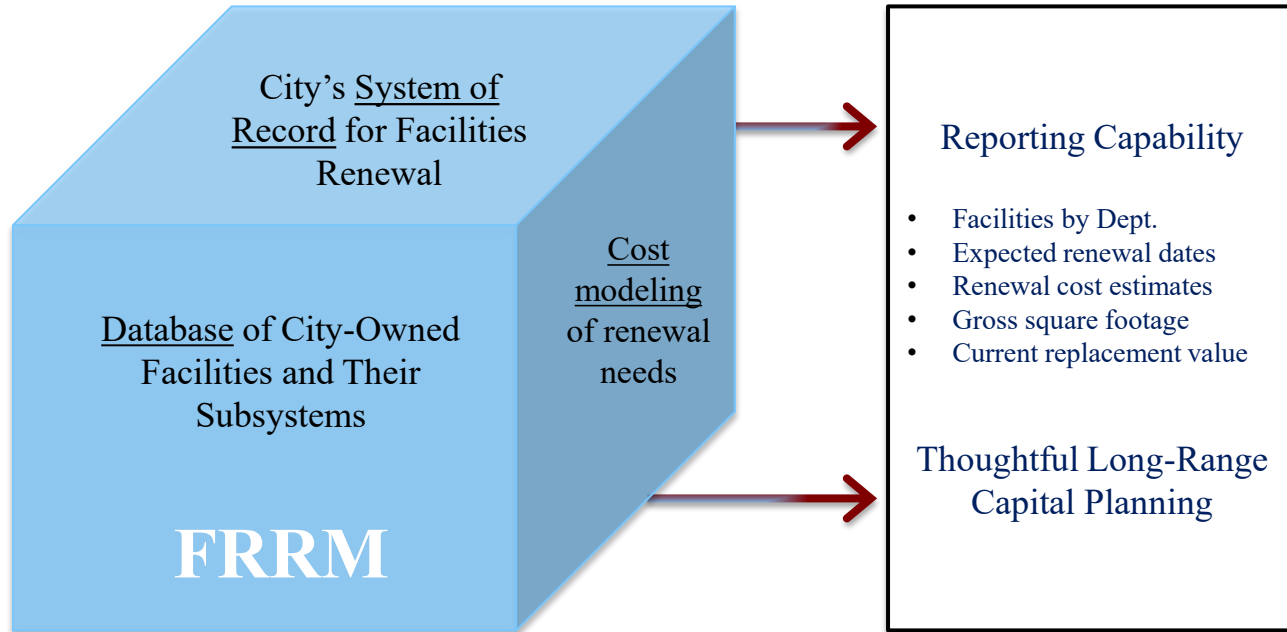
Discussion Item

# Facilities Resource Renewal Model (FRRM) Replacement

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Office of Resilience and Capital Planning | Feb 13, 2026

# What is FRRM?







Dashboards

Benchmarks & Analytics

Campus Story

Campus Profile

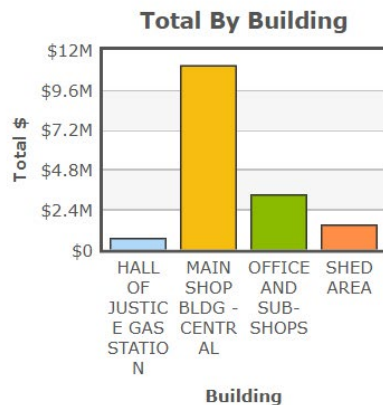
Data



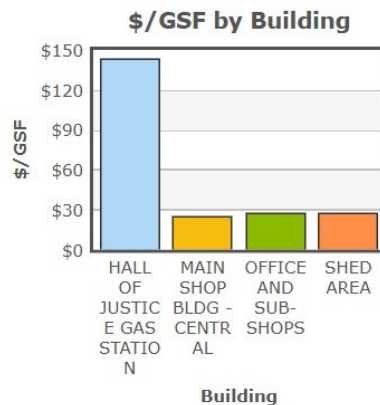
Begin Renewal

## City of San Francisco ► ADM ▼

Backlog Total \$ by building ⓘ



\$/GSF by building ⓘ



Building Name	CRV Cost (in 000's)	Year Built	GSF ▲
Moscone West	\$552,286	2002	775,000
HALL OF JUSTICE	\$548,723	1959	700,000
MOSCONE CENTER (South)	\$463,208	1981	650,000
49 SO. VAN NESS - PERMIT CENTER	\$401,954	2020	564,045
1 SO. VAN NESS OFFICE BLDG	\$399,071	1960	560,000
MOSCONE NORTH	\$370,566	1992	520,000
CITY HALL	\$496,882	1915	516,484
BILL GRAHAM CIVIC AUDITORIUM	\$269,239	1915	302,250

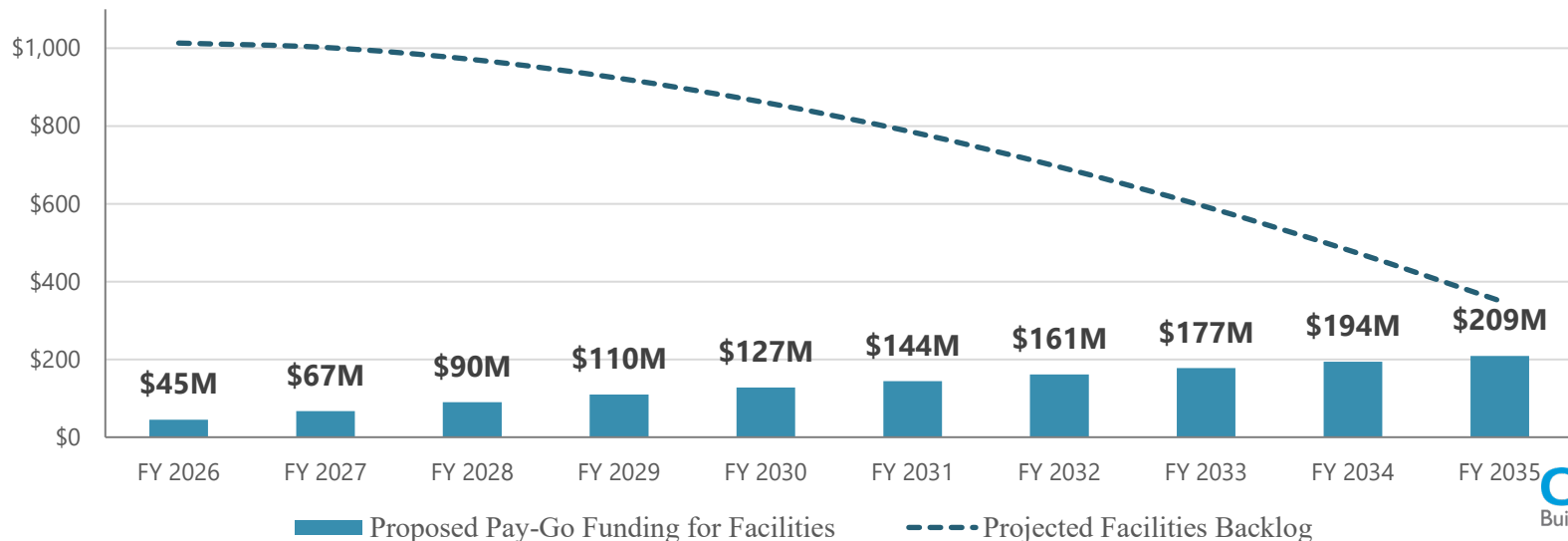
# Why is FRRM important for Capital Planning?

Basis for the **\$52B**  
10-Year Capital Plan

Informs the  
**~\$400M**  
Annual Capital  
Budget

Builds the  
Argument for  
Investment in  
Renewals

## ESTIMATING THE CITY'S DEFERRED MAINTENANCE BACKLOG



# FRRM is outdated and will not be supported by 2027

- The current model is outdated (in use since 2006) and the vendor will not support the system after 2027
- The projections generated are lower than expected because the cost basis has not been updated in several years
  - This could lead to an inaccurate representation of the City's facilities needs – making planning and funding of projects challenging
- The user interface is challenging for new users, and bugs are no longer being addressed by the vendor

# Proposed Solution

## Replace FRRM with a new system

- Initiate an RFP process to explore alternatives and obtain quotes
- Once vendor is selected, work on customization, data transfer, and training
- Have the new system fully functional by summer 2027, in preparation for next 10-year Capital Plan update

**Project Sponsor:** Brian Strong

**Project Manager:** Hemiar Alburati / Nishad Joshi

**Technical Lead:** Hemiar Alburati

**Business Lead:** Nishad Joshi

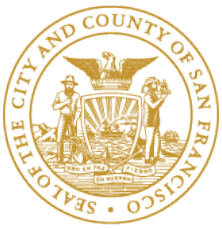
# Budget and Timeline

- Requesting **\$250k** in FY27 and **\$250k** in FY28
  - These are preliminary estimates – the actual cost will be refined through the RFP process
- This budget is expected to cover initial setup costs, as well as 2-3 years of the ongoing annual cost
- RFP process will be initiated in FY26 (current year) or early FY27, with an expected completion in summer 2027

# Questions and Comments

[onesanfrancisco.org](https://onesanfrancisco.org)





# Office of the City Administrator

## Committee on Information Technology (COIT)

### Identity & Access Management Disaster Recovery Integration

Office of the Controller & Department of Technology  
Friday, February 13, 2026

**Project Sponsor:** Jack Wood, Chief Systems Officer, Controller's Office (Accountable for project success and funding)

**Project Manager:** Ashley Neal, Project Manager, Controller's Office (Responsible for day-to-day execution)

**Technical Lead:** Chinna Subramaniam, IAM Director, Department of Technology (Responsible for technical implementation)

**Business Lead:** Ana Contreras, Chief Technical Officer, Controller's Office (Responsible for business requirements and adoption)

# Problem Statement & Solution

## Project Objective

This project aims to implement disaster recovery (DR) integration with Oracle Identity and Access Management (IAM) for PeopleSoft FSCM (SF Financials & SF Procurement) and HCM (SF People & Pay and SF My Hub), ensuring secure, MFA-enabled, and uninterrupted access during failover events. The scope includes configuring IAM for DR environments, validating authentication and single sign-on (SSO), and conducting end-to-end failover testing to guarantee continuity of mission-critical payroll, financial transactions, and HR operations.

## Problem Statement

After migrating from an on-premises infrastructure to Oracle Cloud Infrastructure (OCI), ensuring robust disaster recovery (DR) has become critical. The current DR solution for these mission-critical applications lacks the additional security measures provided by Oracle IAM. Furthermore, the existing DR setup only supports approximately 6,000 department “power users” in finance, procurement, HR, payroll, and benefits; whereas the proposed solution would enable secure, reliable DR access for **all 35,000 employees, nearly 40,000 retirees** who access health benefits, and **over 5,000 suppliers** who do business with the City.

## Proposed Solution

The recommended approach is to implement Oracle IAM disaster recovery integration using OCI-native tools and PeopleSoft-certified configurations, ensuring secure authentication, MFA, and SSO during failover for all stakeholders. This solution leverages OCI’s high-availability architecture and IAM federation to deliver measurable benefits, including **secure DR access for all 80,000 end users noted above**, while enabling a scalable DR framework for **300+ applications currently integrated with IAM**, significantly improving citywide resilience. This integration also protects against three critical scenarios: **(1) IAM failure, (2) PeopleSoft failure; and (3) simultaneous failure of both IAM and PeopleSoft,**



# Project Structure and Complexity

## Project Structure

The Controller’s Office and Department of Technology will provide decision authority, with final approval from the Deputy Controller and Citywide Information Security Officer. Quality assurance will include formal validation checkpoints, security audits, and performance benchmarks. The project will be executed in the following four phases.

Phase 1 -- Planning: The Planning phase will establish requirements, timelines, and stakeholder roles across all scenarios.

Phase 2 – Design: Each Design & Configuration phase will implement Oracle IAM integration for PeopleSoft in both primary and DR environments, incorporating MFA and security controls.

Phase 3 – Testing: The testing phase will include failover drills, authentication validation, and compliance checks to ensure zero authentication failures and full role-based access consistency.

Phase 4 – Deployment: The deployment phase will finalize production readiness for each scenario, with a phase-gate review process applied at every stage, using go/no-go criteria based on deliverable completion, risk assessments, and stakeholder approvals.

## Project Complexity (Level 2 – Moderate)

This project will cost less than \$500k and has an enterprise-wide impact, high technical risk, involves multi-department coordination, and moderate system integration. The scope focuses on configuring Oracle IAM for disaster recovery within OCI and validating authentication processes for PeopleSoft FSCM and HCM, without introducing major architectural changes or complex dependencies. Organizational complexity is limited since existing business processes remain largely unchanged, and training needs are minimal, with only basic DR protocol updates required.

# Project Schedule & Timeline

Est. Completion Date	Deliverable / Milestone	Brief Description
<b>March 2027</b>	Phase 1. IAM Ashburn (DR) <> Psft Phoenix (primary) Deployment	<b>IAM Failure:</b> Integrating IAM DR environment with PeopleSoft Enterprise Systems primary production environment (non DR), ensuring continuity if IAM fails
<b>July 2027</b>	Phase 2. IAM Phoenix (primary) <> Psft Ashburn (DR) Deployment	<b>PeopleSoft Failure:</b> Integrating IAM primary production environment (non-DR) with PeopleSoft Enterprise Systems DR environment, ensuring continuity if PeopleSoft fails
<b>September 2027</b>	Phase 3. IAM Ashburn (DR) <> Psft Ashburn (DR) Deployment	<b>IAM and PeopleSoft Failure:</b> Integrating IAM DR environment with PeopleSoft Enterprise Systems DR environment, ensuring continuity if both IAM and PeopleSoft fail

# High Level Project Spending Plan

Category	Description	FY2026-27	FY2027-28	FY 2028-29	FY 2029-30	FY 2030-31
Personnel	<b>CON:</b> Project Management, PeopleSoft Administration, Functional and End User Acceptance Testing <b>DT:</b> IAM	<b>CON:</b> \$48,611 <b>DT:</b> \$12,740	<b>CON:</b> \$27,778 <b>DT:</b> \$5,460	-	-	-
Non-Personnel Cost	IAM Professional Services	<b>COIT:</b> \$70,000	<b>COIT:</b> \$30,000	-	-	-
Technology Cost	\$0.000	-	-	-	-	-
<b>Total Amount</b>		<b>CON:</b> \$61,351 <b>DT:</b> TBD <b>COIT:</b> \$70,000	<b>CON:</b> \$33,238 <b>DT:</b> TBD <b>COIT:</b> \$30,000	-	-	-

# Operationalization and Resource Management

**Operationalization:** To ensure sustained long-term success, the project will be operationalized through:

- Comprehensive documentation, targeted training sessions for IT and functional teams, and a formal knowledge transfer plan to embed DR procedures into standard operations.
- The project team will coordinate closely with operational support teams during handoff, ensuring IAM configurations and failover protocols are fully understood and incorporated into routine maintenance cycles.
- Ongoing performance monitoring will track success metrics. Regular audits and periodic DR testing will validate readiness and compliance, while governance oversight will maintain alignment with citywide resilience and cybersecurity objectives.

## **Resource Management:**

- Project resources will be managed through a structured allocation plan that ensures sustainability post-implementation.
- A core project team, including DT IAM Team leads and CON Systems PeopleSoft administrators, will be dedicated full-time during execution, supported by extended team members providing part-time subject matter expertise from the Controller's Office.
- Oracle vendor resources will assist with configuration validation and troubleshooting during critical phases.
- After deployment, maintenance will transition to the operational support team, which will monitor IAM and DR performance through scheduled failover tests, security audits, and system health checks.

# Stakeholder Analysis & Engagement

Stakeholders	Milestones	Motivation & Drivers	Anticipated Involvement	Activities
Christine Beetz, Citywide Payroll Director	The Citywide Payroll Director’s involvement is required during the Planning phase to validate payroll continuity requirements and during Testing and Deployment phases to ensure DR failover does not disrupt payroll processing. Their input is critical when defining success criteria for authentication and access during outages.	The stakeholder is invested because payroll is a mission-critical function that impacts 35,000 employees, and any disruption could lead to delayed payments, compliance issues, and loss of trust. Ensuring secure, uninterrupted access during DR scenarios directly supports operational resilience and financial integrity.	The Citywide Payroll Director will have a moderate level of involvement, primarily as a subject matter expert during requirements gathering and validation, and as an approver for DR testing outcomes related to payroll processes.	Key activities include requirements definition for payroll continuity and sign-off on successful DR validation to confirm compliance and readiness.
Jocelyn Quintos, Chief Accounting Officer (CON)	The Chief Accounting Officer’s involvement is required during the Planning phase to confirm financial reporting continuity requirements and during Testing and Deployment phases to validate that DR failover does not disrupt accounting processes or compliance reporting.	The stakeholder is invested because accurate and timely financial reporting is essential for compliance, transparency, and maintaining public trust. Any disruption could lead to audit findings, delayed reporting, and regulatory penalties.	The Chief Accounting Officer will have a moderate level of involvement, primarily as a reviewer and approver for DR testing outcomes related to accounting and reporting functions.	Key activities include requirements definition for financial continuity and sign-off on successful DR validation to confirm compliance readiness.
Nathan Sinclair, Chief Information Security Officer (CISO)	The CISO’s involvement is required during the Planning phase to validate security requirements and during Testing and Deployment phases to ensure IAM DR configurations meet citywide cybersecurity standards and compliance obligations.	The CISO is invested because the project strengthens the City’s security posture by enabling MFA and secure authentication during DR events, reducing risk exposure across PeopleSoft and 300+ IAM-integrated applications.	The CISO will have a high level of involvement in governance, security reviews, and approval of DR readiness, ensuring alignment with cybersecurity policies and risk management frameworks.	Key activities include security requirement validation, review of IAM DR configurations, participation in risk assessments, and final approval of security compliance before deployment.

# Policy and Compliance Framework

Compliance Categories	Description
Accessibility	Not applicable as the impact of this effort will not change end user experience nor accessibility standards already established within IAM and Peoplesoft
Security & Privacy	We conducted a full compliance mapping by aligning the City’s Cybersecurity Policy—based on NIST CSF and enforced by DISOs and the APRB—with Oracle’s shared responsibility security model, applicable OCI certifications (SOC, PCI, GDPR/PIPEDA, etc.), and Oracle Cloud Infrastructure privacy controls to define all relevant technical and policy obligations 123. We then reviewed PeopleSoft’s built-in Data Privacy Framework for PII handling and security configurations, auditing designs against city, state, and federal privacy standards as well as PeopleTools best practices, and incorporated remediation steps and checklist validation to ensure ongoing alignment with all regulatory requirements.
Data Governance	We identified data governance compliance requirements by reviewing the City’s Data Governance Policy, California SIMM standards, and Oracle’s OCI data management and retention guidelines to ensure alignment with regulatory obligations. The project incorporates these requirements through documented data handling procedures, role-based access controls, and audit-ready reporting, ensuring PeopleSoft and IAM configurations maintain integrity, security, and transparency throughout the DR process.
Procurement Regulations	No new technology licenses or products are needed for this project, and if professional services are needed, the Department of Technology has already procured services via the Technology Marketplace 3.0, ensuring compliance with all City Procurement Regulations.

# Assumptions, Constraints, and Risks



## Budget and Performance Support:



## Project Assumptions:

- Sufficient internal resources with PeopleSoft and OCI expertise would be available
- Oracle IAM and OCI services would remain stable and fully supported.
- Regulatory environment for security, privacy, and accessibility would not change significantly during the project, which remains true but continues to be monitored.
- Stakeholder alignment and engagement would be consistent, and while this has largely held, ongoing communication plans are in place to address any gaps.



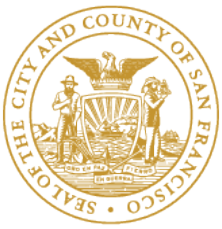
## Constraints & Risks:

As a result of continuously increasing software licensing and support costs and Citywide budget reductions, our main constraints are:

- The Department of Technology does not have sufficient IAM resources in house to support this effort,
- Although the Controller's Office has sufficient staffing to drive the project, we do not have sufficient Non-Personnel Services budget to fund the IAM resources needed by the Department of Technology.

# Questions & Answers





**Office of the City Administrator**  
**Committee on Information Technology (COIT)**

**AI Enabled Customer Service**  
**Office of the Controller**  
**Friday, February 13, 2026**

**Project Sponsor:** ChiaYu Ma, Deputy Controller (Accountable for project success and funding)

**Project Manager:** Ashley Neal, Project Manager (Responsible for day-to-day execution)

**Technical Lead:** Ana Contreras, Chief Technology Officer (Responsible for technical implementation)

**Business Lead:** Jack Wood, Chief Systems Officer (Responsible for business requirements and adoption)

# Problem Statement & Solution

**Project Objective:** This project aims to create a unified, AI-enabled customer service framework that supports nearly 35,000 employees, 40,000 retirees, and over 10,000 City suppliers who rely on the Citywide ERP for critical processes such as budgeting, finance, procurement, HR, benefits, and payroll. By leveraging AI technologies—including chatbots, virtual assistants, and predictive analytics—the initiative will improve service responsiveness, enhance user experience, and enable data-driven decision-making across all ERP-related functions.

**Problem Statement:** Currently, customer service for ERP-related processes—spanning budget, finance, procurement, HR, benefits, and payroll—is decentralized, with over 55 department teams and 10 central agencies operating independently. This **fragmentation results in inconsistent experiences** for employees, retirees, and suppliers, who often face **delays and confusion** when seeking support. Employees and vendors struggle with **redundant processes and lack unified tools**, while the absence of centralized AI analytics limits data sharing and proactive service improvements.

**Proposed Solution:** The recommended approach is to implement a centralized AI-enabled customer service framework that integrates chatbots, virtual assistants, and predictive analytics across all agencies supporting ERP functions. This solution will automate routine tasks, provide 24/7 personalized support for employees, retirees, and suppliers, and enable real-time data insights for proactive decision-making. The technology stack will include SaaS-based digital assistants and adoption platforms, ensuring interoperability and scalability across budget, finance, procurement, HR, benefits, and payroll workflows.

# Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	n/a
Estimated Project End Date (Fiscal Year)	FY 2029-30
Estimated Cost of Project	\$2 million
COIT Allocation Received to Date (Total and Year)	\$0
COIT Allocation Spent to Date (Total and Year)	\$0
Available Project Balance	Available Balance: \$0
Alternative Funding Sources (If any)	N/A
Alternative Funding Sources Received to Date (Total and Year)	\$0
Use of Funds to Date (Include any of the options provided or include others if necessary)	N/A

# High Level Project Spending Plan

Category	Description	Q1 (July – Sept.)	Q2 (Oct. – Dec.)	Q3 (Jan. – Mar.)	Q4 (April. – June.)
Personnel	CON Systems Project Manager, Developers, Functional and User Support Analysts	CON: 20,000	CON: 20,000	CON: 20,000	CON: 20,000
Non-Personnel Cost	Professional Services		COIT: \$40,000	COIT: \$20,000	COIT: \$10,000
Technology Cost	AI Agents	CON: 5,000 COIT: \$0	CON: 5,000 COIT: \$10,000	CON: 5,000 COIT: \$10,000	CON: 5,000 COIT: \$10,000

# Project Schedule & Progress

Completion Date	Name of Milestone Completed	Brief Description
October 2025	Service Delivery Assessment	Data-driven analysis of over 30,000 customer service tickets across over 30 PeopleSoft modules to identify opportunities the best use case for proof of concept
January 2025	GenAI for PeopleSoft Expenses Proof of Concept Kickoff	Proof of Concept Scope, Timeline, Project Team Roles & Responsibilities, Budget, Project Risks, Next Steps

Est. Completion Date	Name of Upcoming Deliverable / Milestone	Brief Description
February 2026	•ODA & GenAI agent deployed and integrated with FSINT	Non-production integration of GenAI agent
March 2026	•Expenses policies, procedures, and systems guidance uploaded	GenAI agent training
March 2026	•Test cycle 1 (CON Systems Only) complete	Test cases documented and thoroughly tested
April 2026	•Proof of Concept Assessment & Recommendations	Analysis of test results and recommendation regarding potential deployment of agent to production environment for targeted end user testing

# Assumptions, Constraints, and Risks



## **Budget and Performance Support:**

The COIT Budget and Performance Subcommittee can support success by promoting interdepartmental collaboration across ERP-related functions. Additionally, the subcommittee can assist with stakeholder engagement to align priorities among agencies and mitigate resistance to change. Regular budget reviews and performance tracking will help maintain financial discipline and ensure alignment with strategic objectives.



## **Project Assumptions:**

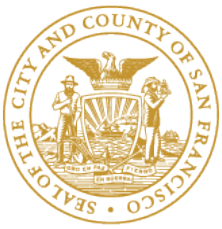
- Availability of skilled resources to manage AI implementation for ERP-related processes, vendor support for technology integration, and stable regulatory requirements for data privacy and cybersecurity.
- Agencies would collaborate and share data to enable centralized workflows across budget, finance, procurement, HR, benefits, and payroll.



## **Constraints & Risks:**

- Compliance with data privacy and cybersecurity regulations adds complexity, requiring close coordination with the City's CISO and CDO.
- Timeline risks include dependency on cross-agency collaboration.
- Unrealistic expectations for immediate results, potential AI bias, and resistance to change among staff supporting ERP processes.
- Mitigation strategies involve phased implementation, robust training, and governance frameworks to ensure fairness, security, and stakeholder buy-in.

# Questions & Answers



# **Office of the City Administrator**

## **Committee on Information Technology (COIT)**

### **PeopleSoft Delivered eBenefits and System Improvements Health Service System Friday, February 13, 2026**

**Project Sponsor:** Rin Coleridge

**Project Manager:** Brian Rodriguez

**Technical Lead:** Vish Shenoi

**Business Lead:** Olga Stavinskya-Velasquez



# **Project Overview**

## **Problem Statement**

- HSS uses city-wide PeopleSoft for benefits administration, based on outdated configurations (about 15 years ago) and customizations that result in significant manual workload.

## **Project Objective**

- Analyze current system configuration and implement system modifications and enhancements to minimize manual processing and leverage delivered automations, reduce data errors and reduce staff time, allowing them to focus on essential processes.

# Proposed Solution

HSS Vendor Elire Inc. has identified four key areas for update an optimization to achieve desired improvements.

- **Benefits Optimization:** Base for all optimization related activities for current-state to prepare for future state automation and modernization.
- **Benefits Automation:** Automation of all benefit administration related activities from job-initiated transactions through payroll processing of benefit deductions.
- **Enrollment Modernization:** Modernization of the online enrollment experience for all events, including automation of approvals, attachments and auditing.
- **Delinquencies Transformation:** Leverage prior phase application configuration to transform the Delinquencies process; minimize system customization and streamline the entire process

# Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	FY 25-26 (FY 26-27 Assumed)
Estimated Project End Date (Fiscal Year)	FY 26-27
Estimated Cost of Project	\$625,000 (inclusive of COIT Funding)
COIT Allocation Received to Date (Total and Year)	\$200,000 (FY 25-26: \$100,000 / FY 26-27: \$100,000 assumed)
COIT Allocation Spent to Date (Total and Year)	\$100,000 (FY 25-26: \$100,000);
Available Project Balance	Available Balance: (\$158,600 FY 25-26; FY 26-27 \$200K Budgeted, \$100K COIT Assumed FY 26-27; Total Assumed \$458,600)
Alternative Funding Sources (If any)	HSS Healthcare Sustainability Fund
Alternative Funding Sources Received to Date (Total and Year)	\$425,000 (FY 25-26: \$225,000 / FY 26-27: \$200,000)
Use of Funds to Date (Include any of the options provided or include others if necessary)	External Vendor Elire has completed Initiation and Functional Assessment

# High Level Project Spending Plan

Category	Description	Q1 (July – Sept.)	Q2 (Oct. – Dec.)	Q3 (Jan. – Mar.)	Q4 (April. – June.)
Personnel					
Non-Personnel Cost	Professional Services Vendor: Elire			COIT/Health Care Sustainability Fund \$166,400	COIT/ Health Care Sustainability Fund \$158,600
Technology Cost					

Under the current professional services contract with Elire we have completed the Initiation and Functional Assessment. As for next steps we expect to start the following by:

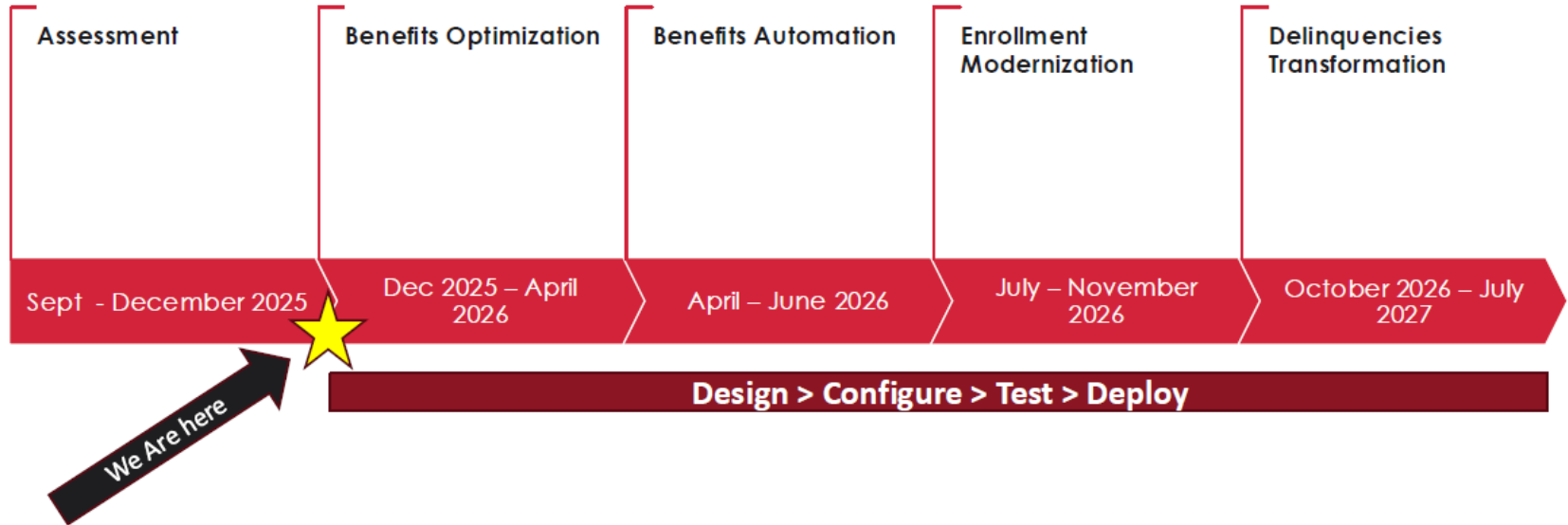
- Q3: Benefits Optimization: Vendor redesign existing configuration of Benefits Administration PeopleSoft Module
- Q4: Benefits Automation: Streamline built in PeopleSoft Automation, building on configuration changes.

# Project Schedule & Progress

Completion Date	Name of Milestone Completed	Brief Description
08/28/2025	Project Kickoff with Elire	Initial meeting and setup of goals, expectations, and outcomes.
01/15/2026	Functional Assessment and Optimization Recommendations Presented	Vendor presentation on functional assessment, pain points, and recommended modernization configuration and programming changes.

Est. Completion Date	Name of Upcoming Deliverable / Milestone	Brief Description
April 2026	Benefits Optimization	Vendor redesign existing configuration of Benefits Administration PeopleSoft Module
June 2026	Benefits Automation	Streamline built in PeopleSoft Automation, building on configuration changes.
November 2026	Enrollment Modernization	Leverage existing PeopleSoft Fluid programming to modernize enrollment processes
July 2027	Delinquencies Transformation	Transform existing processes by enacting built-in PeopleSoft Arrears, Retro-Benefits, and Deduction Billing capabilities.

# Timeline



# Assumptions, Constraints, and Risks



## **Budget and Performance Support:**

Provide any procedural or administrative expediency support to reduce the time for contracting and compliance review, approvals, and implementation.



## **Project Assumptions:**

- Some system enhancements/modifications will be in place before Open Enrollment for Plan Year 2027 (October 2026)
- Appropriate system access for implementing configuration changes in PeopleSoft Production Environment
- HSS business processes will adapt to maximize delivered system functionality.



## **Constraints:**

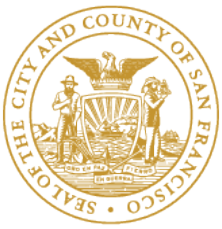
- HSS' Benefits Administration work is limited by resource availability due to ongoing, competing workstreams.
- The Controller's Office, Systems Division has a competing project of a PUM Upgrade and associated Chage/Code Freeze will impact vendor ability to enact desired changes.

## **Risks:**

- Any changes in Funding or Budget based on final review of HSS FY 26-27 budget allocations.

# Questions & Answers





**Office of the City Administrator**  
**Committee on Information Technology (COIT)**

**HSS Efficiency Improvements:**  
**Enhancing Response Systems**  
**Health Service System**  
**Friday, February 13, 2026**

**Project Sponsor:** Rin Coleridge  
**Project Manager:** Brian Rodriguez  
**Technical Lead:** Rin Coleridge  
**Business Lead:** Olga Stavinskya-Velasquez

**Project Objective:**

- Enable external Salesforce workflows, omnichannel communication, and self-service portals
- Improve internal Salesforce automation, configuration, and queue management.
- Expand Salesforce Knowledgebase usage for staff and members.
- With Department of Technology's assistance, explore Salesforce and Cisco WebEx integration for call management and virtual queuing.
- Update Service Cloud configuration to replace legacy features with current capabilities.

**Problem Statement:**

HSS membership increases annually, up 9.8% from 10 years ago to 133,332 members, while HSS staffing levels have reduced 11.5% over that same period to 46 employees. The HSS workforce must navigate the dual challenge of diminishing resources and escalation workloads to fulfill member demand.

**Proposed Solution:**

HSS is engaging expert Salesforce consultants to deliver a comprehensive enhancement of HSS's Salesforce Service Cloud environment and call system integration to improve efficiency, usability, and member experience.

# Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	FY 25-26
Estimated Project End Date (Fiscal Year)	FY 26-27
Estimated Cost of Project	\$275,000 (inclusive of COIT Funding)
COIT Allocation Received to Date (Total and Year)	\$200,000 (FY 25-26: \$100,000 / FY 26-27: \$100,000 assumed)
COIT Allocation Spent to Date (Total and Year)	\$0 (FY 25-26: \$0);
Available Project Balance	Available Balance: (\$100K FY 25-26; FY 26-27 \$75K Budgeted, \$100K COIT Assumed; Total Assumed \$275K)
Alternative Funding Sources (If any)	HSS Healthcare Sustainability Fund
Alternative Funding Sources Received to Date (Total and Year)	\$0 (FY 25-26: \$0 / FY 26-27: \$75,000)
Use of Funds to Date (Include any of the options provided or include others if necessary)	Pending outcome of RFQ to Technology Marketplace

# High Level Project Spending Plan

Category	Description	Q1 (July – Sept.)	Q2 (Oct. – Dec.)	Q3 (Jan. – Mar.)	Q4 (April. – June.)
Personnel					
Non-Personnel Cost	Professional Services  Vendor: Pending RFQ in Tech Marketplace			\$70K	\$30K
Technology Cost					

# Project Schedule & Progress

Completion Date	Name of Milestone Completed	Brief Description
01/23/2026	SOW/RFQ Released	Professional Services RFQ released to Tech Marketplace

Est. Completion Date	Name of Upcoming Deliverable / Milestone	Brief Description
02/18/2026	Release PO to Vendor	Release Purchase Order to Vendor Selected
02/25/2026	Onboarding	Onboard selected vendor to Salesforce

# Assumptions, Constraints, and Risks



## **Budget and Performance Support:**

N/A.



## **Project Assumptions:**

- Business requirements have been documented for desired automated workflows
- DT availability to assist with integration
- Vendor will work in development sandbox and HSS staff would migrate to Salesforce production
- Achieve objectives without incurring additional feature licensing costs



## **Risks:**

- DT/Cisco may not be able to deliver on integration functionality
- Continued Salesforce deprecation of existing features
- HSS resource availability

## **Constraints**

- HSS cannot incur any additional licensing costs.

# Questions & Answers



# Cloud Migration Project

Committee on Information Technology Update

San Francisco Department of Police Accountability

*February 2026*



# Problem Statement & Solution

## Problem Statement

DPA maintains over 4 million pages of physical records (1985–2019), costing approximately \$30,000 annually in off-site storage and transportation. File retrieval takes 2–5 business days, impacting 25+ staff supporting investigations, legal matters, and public records requests. Body-Worn Camera files cannot be archived due to size limits, requiring outdated server infrastructure and consuming limited office space, which hampers efficiency and compliance.

## Proposed Solution

Comprehensive digitization and cloud migration solution providing instant access to all historical records through secure cloud storage. Professional scanning services (GRM) convert all physical documents to a searchable digital format with OCR technology, enabling keyword searches across 34 years of records. High-quality color copies preserve all evidence photos. The solution supports BWC file archiving, allows secure disposal of paper records in accordance with retention schedules, and positions DPA for future digital-first operations.

# Project Status

## Financial Summary

Category	Amount
COIT Allocation FY 25-26	\$550,000
Spent to Date (Feb 2026)	\$278,000
Remaining Budget	\$267,000
Other Funding Sources	None
Total Project Cost	\$550,000

## Project Timeline

**Start Date:** August 2025

**Expected Completion:** June 2026

**Current Status:** On Track - 85% Complete

## Use of Funds

Category	Amount
Vendor Services (GRM)	\$530,000
Cloud Storage Services	\$0*
Project Management	\$0*
Contingency	\$20,000
Total	\$550,000

*\* No direct cost to department*

# High Level Project Spending Plan

## FY 2025-26 Quarterly Spending

Category	Q1 (Jul-Sep)	Q2 (Oct-Dec)	Q3 (Jan-Mar)	Q4 (Apr-Jun)	Total
Vendor Services (GRM)	\$65,000	\$104,000	\$117,000	\$242,000	\$530,000
Cloud Storage*	\$0	\$0	\$0	\$0	\$0
Project Management*	\$0	\$0	\$0	\$0	\$0
Contingency	\$0	\$0	\$0	\$20,000	\$20,000
Quarterly Total	\$65,000	\$104,000	\$117,000	\$262,000	\$550,000

### Notes:

- Q1-Q2 spending focused on project setup and initial scanning services (Nov-Dec)
- Q3 spending includes completion of scanning and metadata tagging
- Q4 spending covers final media digitization, testing, and paper disposal
- \*Cloud storage and project management provided at no cost to department

# Project Schedule and Progress

## Completed Milestones

### August 2025 - Project Kickoff

*Vendor contract executed, project team established*

### November 2025 - Scanning Initiated

*GRM began physical document scanning*

### January 2026 - Scanning Complete

*All 5M+ pages scanned and digitized*

### January 2026 - Cloud Migration Started

*Electronic files transferred from on-premise servers*

### February 2026 - Metadata Tagging

*Final stages of document tagging and indexing*

## Upcoming Milestones

### March 2026 - Cloud Migration Complete

*All files accessible in cloud, testing complete*

### April 2026 - Media Digitization

*CDs, DVDs, and other physical media converted*

### May 2026 - User Training

*Staff training on cloud access and search capabilities*

### June 2026 - Paper Disposal

*Secure destruction of paper records per retention schedule*

### June 2026 - Project Closeout

*Final documentation and project completion*

**Project Status:** On schedule for June 2026 completion. No significant delays or issues. All major technical milestones achieved on time.

# Assumptions, Constraints, and Risks

## Budget and Performance Support Needed

N/A - Project is proceeding on schedule and within budget.

## Project Assumptions

Initial assumptions included: GRM's scanning capacity and timelines, cloud vendor reliability, staff readiness for cloud adoption, and legal approval to destroy paper records post-digitization in accordance with retention schedules. The remaining assumption to monitor is whether final budget allocations will fully cover media digitization and paper disposal costs.

## Constraints and Risks

**Timeline constraint:** Project must be completed by June 2026 fiscal year-end to align with the budget cycle.

**Budget constraint:** Remaining \$267K must cover Q3-Q4 activities, including media digitization and paper disposal

**Technical risk:** Cloud system performance under full production load will be validated during Q3 testing;

**Operational risk:** Staff adoption and change management are being addressed through a training program scheduled for May 2026.

**Compliance risk:** Paper disposal must follow approved retention schedules and secure destruction protocols; mitigation includes legal review and certified disposal vendor.

# Adjournment

Thank you!