Budget and Performance Subcommittee Weekly Meeting
February 27, 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 February 20, 2026
6. FY2026-28 Technology Project Proposals Presentations
7. Adjournment

Item Number 3

General Public Comment

Discussion Item

Item Number 4

Department Updates and Announcements
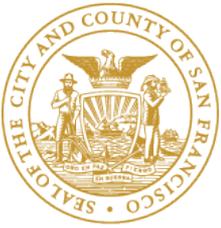
Discussion Item

Item Number 5

Approval of Minutes from February 20, 2026

Action Item

Item Number 6

FY2026-28 Technology Project Proposals Presentations

Discussion Item

eCMS
Department of Public Health (DPH)
February 27, 2026

Project Sponsor: Jenny Louie (Accountable for project success and funding)
Project Manager: Elizabeth Krueger (Responsible for day-to-day execution)
Technical Lead: Jim O'Hare, Koho Consulting (Agiloft implementation partner) (Responsible for technical implementation)
Business Lead: Michelle Ruggels (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective:

Improve contract operational efficiencies and lead times, provide comprehensive management oversight tools, provide departmental access to contracts documents and status/workflow information, and provide the ability to report on key data attributes related to contracts.

- Current state solutions (primarily SharePoint/network folders) lack transparency, management tools, meta-data capture and reporting capabilities.
- Limited data collection indicates that contracts take several months to complete, with an overall average minimum of 6 month and maximum of 21 months. Contracting delays cause both internal and supplier business impacts.
- Process improvement activities began in 2025 and are ongoing.
- The eCMS solution will provide management with insight into bottlenecks and where processes can be further improved.

Problem Statement:

The current lack of workflow transparency and reporting capabilities leaves the estimated 800-1000 department contract requestors and Business Office management without the ability to predict completion or understand and resolve bottlenecks. The DPH Business Office of approx. 80 people manages the contract lifecycle for over 830 contracts annually.

- Approximately 480 contracts are for solutions and services needed for DPH internal operations, including leases, purchases of equipment, software, registry services and hospital maintenance.
- Approximately 350 contracts are with Community-Based Organizations (CBOs) representing more than 550 programs, and many of these require annual updates either through RPBs or formal amendments.
- The team also manages dozens of Requests for Proposals/Qualifications/Information annually, as well as memoranda of understanding and Civil Service Commission approvals.

Problem Statement & Solution

- eCMS/Agiloft will support the contract lifecycle from initial request through certification of the contract, provide a centralized document repository for contracts and legal agreements, and provide workflow tools to manage the processes.

- DPH completed a solicitation and contract for a contract lifecycle management (CLM) solution in 2025. Partners from CON Systems and DT were engaged to ensure RFP requirements met integration standards for City platforms including PeopleSoft, DT ServiceNow, active directory and Microsoft tools.

- Agiloft is AWS hosted, with DPH in its own partition. Once live, we will have both a Production and a Pre-Production instance. Product licensing includes Workato for integration. Agiloft (via Workato) will integrate with PeopleSoft for Supplier, Contract and Sourcing Event data, and with DT ServiceNow for relevant approval workflows. Integration will start with triggers from PeopleSoft/SNOW and be one-way only, for now. (Integration with LogicGate was removed from contract scope based on DT feedback.)

- In addition to workflow management capabilities, Agiloft includes contract automation tools such as generation of contract documents based on defined data, including/reserving clauses, and redlining and AI-assisted version comparison tools.

Project Structure and Complexity

The eCMS project has a governance structure with daily management provided by both DPH and Agiloft technical project leadership. We are in the requirements-gathering phase, requiring regular review and updates of workflows and contract templates.

Key Activities/Milestones:

- January 2026: Agiloft Testing of AI data extraction/legacy contract document conversion began in January and continues with testing of increasing volumes and human validation of accuracy until DPH review & signoff in July. Tests of data loading/conversion will be staged with a "catch-up" conversion shortly before go-live.

- January 2026: Agiloft/CON Systems/DT PeopleSoft and ServiceNow integration planning started in January. Integration sprints with CON Systems are slated for mid-April through mid-June. Integration sprints with DT ServiceNow are slated for mid-June through late July, with Agiloft system testing to follow through August. Agiloft "Connectors" to email, Docusign, Active Directory and MS Word will be built and tested starting late March and running through August.

- January 2026: Agiloft/DPH Readiness/Requirements Gathering started & will wrap up with a signed off Business Requirements Document (BRD) in March 2026.

- March 2026: Agiloft Build Preparation/Buildout begins after signoff of the BRD with multiple iterations running through May

- August 2026: DPH will review and sign off on readiness to move forward into the final technical QA cycle in late August, with DPH-executed UAT running for the 2nd half of September. Change freeze and pre-go-live activities run through most of October, with go/no-go and go-live slated for late October/early November. This will be followed by a 2-week post-go-live "hyper care" period of support.
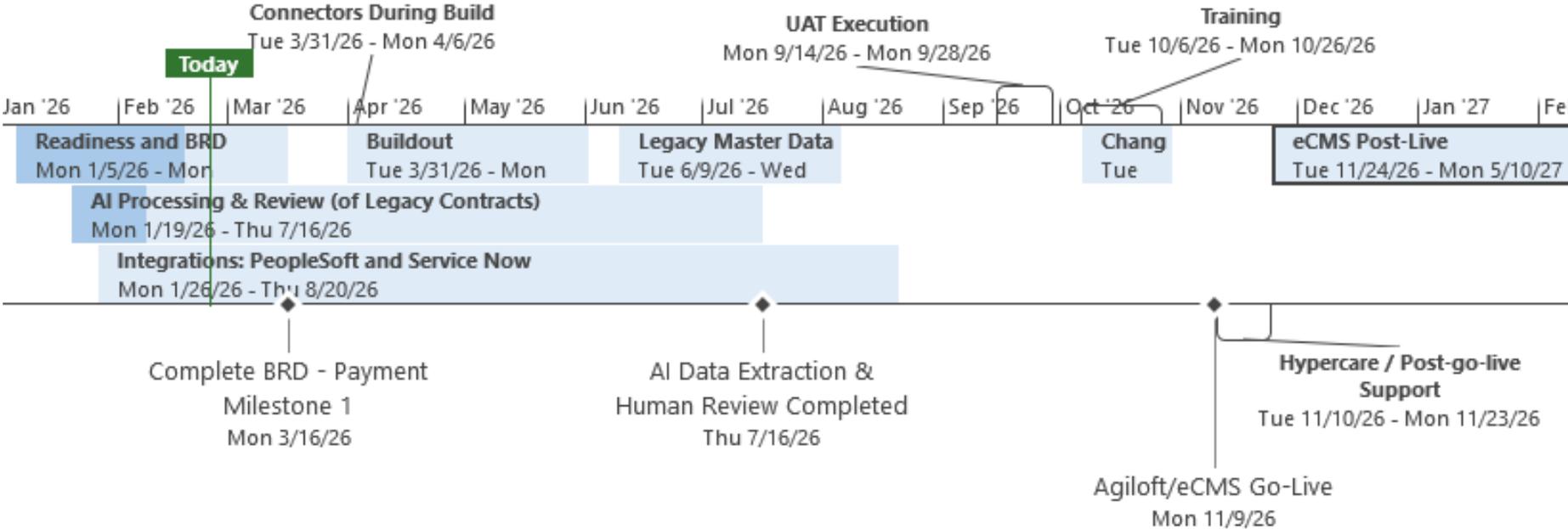
Project Structure and Complexity

Project Complexity:

eCMS falls between Level 1 on the COIT scale. Process improvement activities have identified the need for development of standard work in addition to more standardized workflows. The change from essentially no systems where process variation is the rule to a workflow-based, shared platform and a focus on improved timeliness is significant.

In addition to the Agiloft "core" users, staff across DPH who request or manage contracts will need to be made aware of the changes and will require training to gain a better understanding of contract.

- The implementation project will run for 10-11 months but be less than $500k in project spending.

- Technical risk is low overall.

- Agiloft/Workato has many successful bi-directional API integrations with PeopleSoft, but the integration will be new for CON Systems, and we're late getting started on it.

- Integration planning calls regarding email, Active Directory and Service Now have gone very smoothly, with all documentation requested by DT or Agiloft readily available.

Project Schedule & Timeline

Connectors During Build
Tue 3/31/26 - Mon 4/6/26

UAT Execution
Mon 9/14/26 - Mon 9/28/26

Training
Tue 10/6/26 - Mon 10/26/26

Today

| Jan '26 | Feb '26 | Mar '26 | Apr '26 | May '26 | Jun '26 | Jul '26 | Aug '26 | Sep '26 | Oct '26 | Nov '26 | Dec '26 | Jan '27 | Feb |

Readiness and BRD
Mon 1/5/26 - Mon

Buildout
Tue 3/31/26 - Mon

Legacy Master Data
Tue 6/9/26 - Wed

Chang
Tue

eCMS Post-Live
Tue 11/24/26 - Mon 5/10/27

AI Processing & Review (of Legacy Contracts)
Mon 1/19/26 - Thu 7/16/26

Integrations: PeopleSoft and Service Now
Mon 1/26/26 - Thu 8/20/26

Complete BRD - Payment
Milestone 1
Mon 3/16/26

AI Data Extraction &
Human Review Completed
Thu 7/16/26

**Hypercare / Post-go-live
Support**
Tue 11/10/26 - Mon 11/23/26

Agiloft/eCMS Go-Live
Mon 11/9/26

High Level Project Spending Plan

Category	Description	FY2026-27	FY2027-28	FY2028-29	FY2029-30	FY2030-31
Personnel	Implementation and Training Services from Agiloft/Koho	DPH - $327,000				
Non-Personnel Cost						
Technology Cost	Agiloft Hosting, Maintenance and Software Licensing	DPH - $784,558	DPH - $784,558	DPH - $784,558	DPH - $784,558	DPH - $784,558
Total Amount		DPH - $1,111,558	DPH - $784,558	DPH - $784,558	DPH - $784,558	DPH - $784,558

5-year total $4,249,788. It is the contract contingency that takes the total over $5 million

Operationalization and Resource Management

- The DPH Business Office has a small team of three staff dedicated to operational support for Agiloft. DPH IT are in the process of extending offers to two 1052 staff who will share IT support responsibility for Agiloft.

- Both the Business Office and IT team are participating in the project phases, and both groups will take Agiloft Administration training. They will have different administrative capabilities: for example, the Business Office admins will update contract clauses/language and the IT admins will manage software updates from Agiloft, and any changes that might update user workflows.

- Project success metrics, including targets for user satisfaction, adoption and improvements in timeliness, are all established in the project charter. Some metrics will be products of the eCMS system data, and others, such as user satisfaction, will require the DPH Business Office to conduct surveys after go-live.

Operationalization and Resource Management

DPH

- Three dedicated Business Office staff (eCMS team) are fully dedicated to the eCMS project and ongoing operations. Business Office subject matter experts (SMEs) are not dedicated to this project, but expectations about engagement have been set.

- SMEs are heavily engaged in requirements definition (now), demands will slack off during technical build and then will pick back up ahead of UAT and Training. SMEs will be trained first, then train their teams and serve as "super users" for support at go-live.

- SMEs and the eCMS team will be developing/documenting standard work and tip sheets throughout.

- IT resources, including the project manager, have multiple responsibilities, but workloads have been planned with the understanding of the project timeline and demands.

Vendor

- The Agiloft implementation partner/sub-contractor Koho has an assigned project lead/implementation leader as well as other technical specialists who will do the configuration, configure and test the integration, etc.

- There is also a part-time project manager from Koho.

- Escalation paths and executive oversight roles at both Koho and Agiloft are also defined.

Stakeholder Analysis & Engagement

Stakeholder Analysis – eCMS direct stakeholders are internal to DPH and city departments including: City Attorney, CON Systems for PeopleSoft integration, and DT for ServiceNow/Active Directory/MS Word integration. Operational improvements are expected to indirectly affect DPH vendors/suppliers, who will see emails from eCMS requesting responses.

Stakeholders	Milestones	Motivation & Drivers	Anticipated Involvement	Activities
City Attorney – Arnulfo Medina, Anne Pearson	Ongoing engagement. Requirements definition, SME participation	CAT would like to use Agiloft, and is working with CAT IT to get approval	Moderate or Limited - SME participation, if using Agiloft; "external user" with email interaction if not	Requirements definition if using Agiloft; awareness and communication about changes as we move to go-live otherwise
CON Systems – Jack Wood, Prabh Kochar, et al	Provided RFP input and participated in vendor selection. PeopleSoft API requirements (now) and support for integration	Provide city standard approach, not 1-off for DPH	Moderate, depending on level of effort	Technical team engagement to understand integration requirements, development and testing
DT – Greg Jorgensen, Eddie Parsa, Natalie Prendergast (SNOW); Dustin Tranberg (Microsoft)	Integration requirements & testing	Standard integration approach	Limited	Provide technical integration requirements, collaborate with eCMS technical staff to test

Policy and Compliance Framework

The Agiloft contract incorporated all relevant compliance and policy language, and it was reviewed with both IT and operational stakeholders as it was being finalized. The solution will not support PHI.

Category of Compliance requirements	Description
Accessibility	Contract language stipulates compliance with applicable accessibility regulations.
Security & Privacy	Security reviews completed and standard language for software solutions is in the contract. No PHI is allowed in the eCMS solution. The hosted instance is separated for DPH per the contract.
Data Governance	DPH Information Governance will be applied where applicable. Data will be maintained in "source" systems (PeopleSoft, SNOW) and not edited within eCMS (until such time as 2-way integration is implemented).
Procurement Regulations	The solution went through a full solicitation process.
Other - AI	The solution includes AI for assisted search as well as supporting review of contract documents for language or DPH-defined risk areas. DPH AI review process was successfully completed and the application registered per City requirements.

Assumptions, Constraints, and Risks

Budget and Performance Support:

Support is not needed, although if an opportunity arises for COIT to support CON Systems in their interface development, that would be appreciated.

Project Assumptions:

Business Office and other DPH stakeholders will adopt a unified/standardized workflow. Significant work has been done in this area and more work is required. Executive leadership at DPH are engaged to provide support when needed.
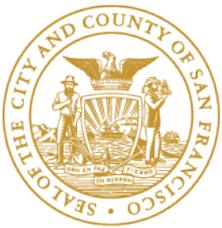
Constraints & Risks:
The below risks are being actively managed, but remain active:

- Resource availability of key SMEs continues to be a risk, with budget and contracting initiatives taxing resources.
- Changes in integration strategy by CON Systems have increased schedule risk.

18

Questions & Answers

Cloud 2030
Department of Technology (DT)
February 27, 2026

Project Sponsor: Mike Makstman (TIS)
Cloud Manager: Paul Merlin (TIS)

Cloud 2030: Executive Summary

Project complexity: Level 3 (Complex) – Enterprise-wide impact; Critical Infrastructure

The Problem: Current Technology Limits City Operations

54% of City workloads rely on on-site hardware which hampers the City's ability to deliver reliable services, move quickly, and use modern tools.

- **Service Reliability:** On-site systems increase the risk of outages affecting critical services due to limited resilience.
- **Speed and Flexibility:** New systems can take weeks to set up, slowing programs, policy changes, and emergency response
- **Modern Capabilities:** Tools like AI and advanced data analysis require flexible technology that current systems cannot support.
- **Working Across Departments:** Disparate systems make it harder and more costly to share data and work together

The Solution: Cloud 2030

Objective: Migrate eligible systems to the cloud by 2030 and drive down percentage of on-site systems to **<10%.**

What This Enables
- Fewer outages and faster recovery
- Faster delivery of services and initiatives
- Use of AI, data, and modern digital tools
- Improved financial transparency & accountability:

  Direct attribution of costs, real-time visibility, reduced capital burdens & predictable long-term costs (largely reduced DT hardware COIT requests – **~$1M/annum cost avoidance**)

Cloud 2030: Approach

How We will Do the Work

Two Part Strategy

1. Migrate ("drag-and-drop")
Move systems off on-site technology to reduce outage and security risk
Focus first on high-risk, high-impact systems
Apply consistent security, access, and cost controls

2. Optimize
Unlock innovation and efficiency by modernizing migrated systems to cloud-native approaches and tailoring based on business requirements.

Scope

To run an effective City government, both shared and department systems must be in the cloud

Central Citywide Systems
- Shared infrastructure and networks
- Security and access controls
- Enterprise applications (finance, HR)
- Data and analytics platforms

Department-Specific Systems
- Mission-critical department applications
- Systems that connect to Citywide data and services
- Public safety, regulatory, and service delivery tools

Cloud 2030: Roadmap & Outcomes

Migrate and Optimize Over Time

Actions	FY27	FY28	FY29	FY30	Outcomes

Central citywide systems modernization: Modernize shared infrastructure, enterprise applications & data platforms

Department systems modernization: Modernize department-owned applications.

Wave 1: Largest cost-drivers & business impact (DT, ADM, CON, TTX, SFFD)

Wave 2: Remaining Wave 1 systems + additional department migrations.

Wave 3: Remaining Departments & long-tail legacy systems

- **Start of FY27:** 10% reduction of on-prem baseline
- **End FY27:** ~25% reduction
- **End FY28:** ~50% reduction
- **End FY29:** ~75% reduction
- **End FY30:** <10%* remaining

On-prem infrastructure minimization: Realize cost savings as on-premises footprint shrinks

Cost-avoid DEM Server Hardware capital investment

Reduce costly legacy vendors

- FY27: Avoid ~$1.5M hardware refresh
- FY28+: Eliminate ~$1M/year legacy contract
- FY30+: Direct attribution of costs to departments

** 100% of applicable systems

Cloud 2030: Risk Management & Contingency

Risk Area	Probability	Impact	Required Executive Actions
Department Support	Medium	Critical	Requires executive mandate to ensure department participation and alignment across IT and finance leadership.
Budget	Medium	Critical	Dependent on approval of multi-year funding and carry-forward to maintain migration cadence.
Legacy Incompatibility	High	High	Pre-Migration Assessment: "Lift & Shift" analysis conducted prior to move. Funding includes 20% Contingency for necessary code refactoring.
Security/Compliance	Medium	High	Proactively assess compliance requirements for workloads. Schedule workloads with arduous compliance requirements for later fiscal years to keep high early cadence.

Cloud 2030: Funding Request

This funding enables departments to improve service reliability and modernization while increasing transparency and accountability over technology spend.

Funding Category	Description	FY26–27	FY27–28	FY28–29
Cloud platforms and governance tools	Citywide cloud management, security, and cost-control platforms that support both central and department systems	$0	$200,000	$550,000
Department migration and modernization pool	Centralized funding pool that departments use to migrate, stabilize, and modernize their systems in approved cloud environments	$600,000	$600,000	$600,000
Cloud delivery FTE capacity (1 FTE, 0.25 FTE PMO)	One full-time cloud engineer and a quarter of a project manager responsible for executing migrations, improving system reliability, and optimizing performance across City systems	$300,069	$300,069	$300,069
Modernization contingency (20%)	Reserved funding to address required system refactoring, security needs, and performance optimization	$120,000	$120,000	$120,000
Carry Forward		**($868,908)**		
Total Requested		**$151,161**	**$1,115,856**	**$1,502,856**

How This Funding Is Used

- **Department migrations funded via COIT.**

  DT will work with COIT and MBO to operationalize department cloud costs into department operating budgets in **FY30** as COIT project funding sunsets.
- **Cloud Delivery FTE capacity** provides consistent execution, reliability, and cost control across all migrations
- **Governance tools** provide visibility and prevent cost overruns as cloud usage scales
- **Contingency funding** avoids delays when systems require refactoring to meet reliability or security standards

Emerging Technologies
Department of Technology (DT)
February 27, 2026

Project Sponsor: Mike Makstman (Accountable for project success and funding)
Project Manager: Jane Gong (Responsible for day-to-day execution)
Technical Lead: Tania Jogesh (Responsible for technical implementation)
Business Lead: Jane Gong (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective:
Build the City's technical, governance, and training foundation so departments can move AI solutions from prototype to production safely and with confidence. Success means scaling cross-department solutions by 2027, reducing duplication, while monitoring usage, accuracy, and bias.

- AI adoption is decentralized, inconsistent, duplicative, and risky.
- AI adoption is driven by departmental needs without Citywide coordination and common infrastructure to support safe experimentation and scaling: shared engineering capabilities, policies and standards, risk and evaluation processes, and procurement pathways that support testing before buying.

Problem Statement:
AI adoption across the City is decentralized, with departments piloting tools in silos or refraining from adoption due to limited resources or competing priorities. This leads to duplicated contracts, inconsistent safeguards, missed opportunities, and limited ability to scale successful solutions. Without a coordinated implementation model and shared engineering capabilities, the City risks a growing gap between City services and residents' expectations, heightened compliance and reputational risks, higher cost of ownership, and erosion of public trust.

Proposed Solution:
The Emerging Technologies Project will deliver shared, reusable AI tools and infrastructure along with validated vendor options to support safe, effective AI adoption at scale. The City will operationalize a structured, citywide emerging technology innovation model that moves solutions from prototype to pilot to production under consistent governance. Safeguards will be operationalized as standardized technical requirements across the full AI lifecycle, and implemented through repeatable build/buy patters, clear evaluation steps, and ongoing monitoring of deployed systems.

Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	FY 2024-25
Estimated Project End Date (Fiscal Year)	FY 2029-30
Estimated Cost of Project	$5.5 million
COIT Allocation Received to Date (Total and Year)	$1,375,385 million (FY 24-25: 1,375,385)
COIT Allocation Spent to Date (Total and Year)	$1,075,385 (FY 24-25: $1,075,385)
Available Project Balance	Available Balance: $292,000
Alternative Funding Sources (If any)	N/A
Alternative Funding Sources Received to Date (Total and Year)	N/A
Use of Funds to Date (Include any of the options provided or include others if necessary)	Lead Engineer and Policy Position / Software Licenses/ Training

High Level Project Spending Plan

Category	Description	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29
Personnel	Ex: Internal staff, external resources, training, and overhead	**$701,000**	**$1,184,000**	**$1,184,000**	**$1,184,000**
Non-Personnel Cost	Ex: Facilities, professional services, contingency planning, etc	**$75,000**	**$200,000**	**$150,000**	**$35,000**
Technology Cost	Ex: Hardware, software, cloud services, integration, etc	**$300,000**	**$240,000**	**$240,000**	**$240,000**
Total Amount		**$1,076,000 ($300,000 carryforward)**	**$1,324,000**	**$1,574,000**	**$1,459,000**

Project Schedule & Progress – Year 1 Deliverables

Enable the Use of AI to Improve Operations and Service Delivery		
July 2025	Copilot Chat Launch	Launched Copilot Chat to 30K City staff
August 2025	311 Knowledge Search App	Built AI Knowledge Search Tool for 311 and soft-launched with a test group of Customer Service Reps
September 2025	Large Vehicle AI Pilot	Evaluated and implemented Large Vehicles AI pilot for Mayor's Office of Innovation
November 2025	AI Playbook	Published step-by-step guide that helps departments pilot and scale responsible, equitable AI solutions
Ensure Safety, Equity, and Public Trust		
June 2025	AI Governance	Established the Emerging Technologies (ET) Advisory Board, and two subcommittees (AI Advisory Committee and a Drone Committee) to guide adoption and governance of emerging technologies
July 2025	GenAI Guidelines	Updated and published the City's Generative AI usage guidelines
November 2025	AI RFM Interviews	Completed interviews with 20+ City leaders and SMEs to inform upcoming citywide AI policy and strategy
January 2026	Chapter 22J Implementation	Published the first citywide AI inventory and delivered the inaugural AI Technologies Report to BOS
Build Workforce Capability and Empowerment		
July 2025	Responsible AI + Copilot Chat Training	Launched on-demand Responsible AI Training for all City staff and trained 4,000+ City staff: webinars, workshops, office hours
October 2025	"AI Food for Thought"	Launched a monthly lunch & learn series to build AI awareness, foster responsible AI exploration, and create a safe space for staff to ask questions
December 2025	SF AI Week and Forum	Hosted the City's first-ever SF AI Forum, convening over 230 City employees in person and more than 1,100 participants via livestream
January 2026	AI Leadership Training	Delivered leadership AI training program to 70+ leaders across 30+ depts creating a strong foundation for AI-awareness across the City

Project Schedule & Progress – What's Next

Enable the Use of AI to Improve Operations and Service Delivery		
March 2026	Consultation/implementation	MBO/MOHCD: invoice review; DEM: RapidSOS AI translations; DS: VertexAI search
April 2026	Knowledge retrieval AI prototype	Launch AI-enabled knowledge retrieval for procurement
June 2026	"Try before you buy" procurement	Launch of a Citywide Experimentation Procurement Framework
July 2026	Citywide AI Workspace	Build common RAG implementation for knowledge search and refine RAG architecture to quickly spin up knowledge search use cases across the City
July 2026	AI Champions Program	Partner with City leadership to launch program of AI leaders to foster responsible AI adoption in every department
Ensure Safety, Equity, and Public Trust		
March 2026	Citywide AI Strategy	Publish a strategy outlining key goals and deliverables to improve service delivery and operations through AI
June 2026	Employee Drone Policy	Approve an updated Citywide Employee Drone Policy, ensuring responsible and coordinated drone use by City departments
July 2026	AI Policy	Approve Citywide AI Policy, identifying actionable safeguards and clear requirements
2027	AI Risk Management Maturity Assessment + Action Plan	Conduct a Citywide AI risk management maturity assessment and formulate an action plan to address gaps and weaknesses
Build Workforce Capability and Empowerment		
September 2026	Custom responsible AI module	Deliver a custom Responsible AI training module to help staff understand and comply with the City's AI policy
2026-2027	AI Food for Thought + CoP	Expand the City's Communities of Practice and the "AI Food for Thought" program to support ongoing learning.
January 2026	AI Leadership Training	Delivered leadership AI training program to 70+ leaders across 30+ depts creating a strong foundation for AI-awareness across the City

Assumptions, Constraints, and Risks

Budget and Performance Support:

The COIT Budget and Performance Subcommittee can support success by advocating sustained funding for internal staff and other implementation resources.

The Subcommittee can also require departments to coordinate with the Emerging Technology (ET) Division before advancing AI initiatives, helping prevent duplication, unsafe deployments, and technical fragmentation.

Project Assumptions:

Sustained engagement from COIT and key City stakeholders (DT, OCA, CAT HR, labor, participating departments).

Executive sponsorship to enable coordination and timely decisions.

Department participation once guardrails, centralized support, and a streamlined procurement pathway are in place.

Pilots will rely on secure, stable, enterprise-grade AI and cloud services, with vendors providing documentation, transparency, and technical support.

A modular, API-driven architecture to prevent lock-in and enable scaling.

Constraints & Risks:

Reduced stakeholder engagement or executive sponsorship, delaying policy approvals and cross-department adoption.

Department capacity constraints, and competing priorities, limiting participation.

Reliance on third-party AI and cloud vendors, increasing security, cost, reliability, and transparency risks.

Evolving regulation and public concerns, requiring policy adjustments or slowing deployment.

Questions & Answers
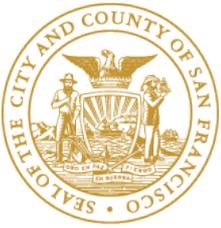
Complying with California Law Assembly Bill 1637 for sf.gov transition
Department of Technology (DT)
February 27, 2026

Project Sponsor: Mike Makstman (TIS), Nathan Sinclair (TIS) (Accountable for project success and funding)
Project Manager: Patrick McCombs (TIS) (Responsible for day-to-day execution)
Technical Lead: Dustin Tranberg (TIS) (Responsible for technical implementation)
Business Lead: Chinna Subramaniam (TIS) (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective:

A multi-year, Citywide migration from @sfgov.org to @sf.gov to meet AB 1637 requirements, reduce cybersecurity risk, and protect public trust. The effort will be executed in phased departmental waves to manage application dependencies and minimize disruption, with no application modernization in scope.

Problem Statement:

AB 1637 mandates migration to a .gov email domain by January 1, 2029. CCSF's current @sfgov.org domain is non-compliant and increases regulatory and security risk. This project delivers a phased, Citywide transition to @sf.gov to ensure compliance and reduce disruption.

Proposed Solution:

Launch a centralized, phased Citywide migration (FY26–FY29) to move 43 departments to @sf.gov using a standardized approach that ensures continuity of operations. The effort focuses on compliance-driven, like-for-like identity migration to reduce risk and enhance CCSF's enterprise security posture.

Project Structure and Complexity

Problem Structure:
The project structure builds on prior experience, as user migrations to the @sf.gov domain have already been completed at a smaller scale, with testing approaches, phases, and milestones well understood. Executive sponsorship is provided by Mike Makstman and Nathan Sinclair, and the Product Owner for the project is Chinna Subramaniam.

Problem Complexity: **Level 3 – Complex**
The project is complex since 43 CCSF departments currently use @sfgov.org email addresses and usernames, and users must be migrated to the new domain in a way that minimizes disruption and limits any impact on productivity.

Project Schedule & Timeline

Est. Completion	Deliverable / Milestone	Brief Description
09/30/2026	TIS dept converted	DT will convert first to troubleshoot and resolve issues - 3 mons
12/31/2026	ART, BOA, CHF, CSC, DEC, ECN, HRC, LLB, MYR, WAR, WOM	First cohort of depts (all depts with DT-supported IT) – 3 mos.
06/30/2027	311, ADM, BOS, CSS, CTA, DPA, HRD, HAS, HSS, REG, RET, SDA	Second cohort of depts converted – 6 mos.
06/30/2028	ADP, DAT, DEM, FIR, JUV, PDR, POL, SHF	Third cohort (public safety) depts converted – 12 mos.
12/31/2028	ASR, CII, CON, CPC, DBI, ENV, HOM, REC, RNT, TTX	Fourth (final) cohort of depts converted – 6 mos.
Not in project scope	AAM, AIR, CAT, CCD, CHF, CRT, DEC, DPH, DPW, FAM, LIB, MTA, PRT, PUC, SCI, USD	Discussions and coordination with departments using domains other than sfgov.org are in progress.

High Level Project Spending Plan

Category	Description	FY2026-27	FY2027-28	FY2028-29
Personnel	Internal staff – DT PMO	**COIT $134,000**	**COIT $134,000**	**COIT $134,000**
Non-Personnel Cost	Professional services	**COIT 742,560**	**COIT $742,560**	**COIT $742,560**
Technology Cost	Ex: Hardware, software, cloud services, integration, etc	-	-	-
Total Amount		**$876,560**	**$876,560**	**$876,560**

Operationalization and Resource Management

Operationalization:
After a given department's users are converted, its IAM automation and DT documentation will be adjusted to reflect the sf.gov domain. After these adjustments, all activities return to standard provisioning and support operations, with no further action needed.

Resource Management:
The project plan includes a phase for each department's processes and documentation to be adjusted permanently to reflect the new domain. After these processes and documentation are complete, no further activity or resources will be required beyond current operational requirements.

Stakeholder Analysis & Engagement

Stakeholders	Milestones	Motivation & Drivers	Anticipated Involvement	Activities
Dept users	Individual conversion date.	Understanding changes in application access and email to minimize impact and user friction.	Low	Notifying their own email audience of the change to their sending (visible) email address. Following other steps as defined by Dept IT.
Dept IT	Throughout (from pilot testing to post-conversion user support).	Supported user population will need comms before change and post-conversion support.	High	User communication, pilot testing, user support, post-conversion updates to dept processes and documentation.
Dept application owners/admins	App testing plans and remediation of app issues identified by pilot users.	Access to applications may require remediation during/after user conversion.	Low to high, depending on impact of the user change on that application.	App testing methodology and pass/fail definitions; reconfiguration of application as needed.

Policy and Compliance Framework

Category of Compliance requirements	Description
Accessibility	n/a
Security & Privacy	Project is driven by California AB1637 requirements, promoting security and trustworthiness of local government bodies.
Data Governance	n/a
Procurement Regulations	n/a
Other	n/a

Assumptions, Constraints, and Risks

Budget and Performance Support:

COIT Performance sub-committee can facilitate interdepartmental collaboration by resolving cross-department dependencies, aligning priorities, and removing organizational barriers. Ongoing oversight, timely decision-making, and support during phase-gate approvals further help keep the project on schedule and aligned with City objectives.

Project Assumptions:

Department application owners must be available to define testing methods and pass/fail criteria.

Department IT will communicate with department user populations (supported by DT). The change will cause a short-term increase in user IT support requirements.

Constraints & Risks:

The State of California deadline (Jan 1, 2029) is legislatively set. All project work needs to be completed by the state deadline.

Applications that are not configured to use the updated email/username may prevent user access, with impacts to productivity.

Questions & Answers

Reducing Life Safety Risk for City Offices
Department of Technology (DT)
February 27, 2026

Project Sponsor: Mike Makstman (TIS), Nathan Sinclair (TIS) (Accountable for project success and funding)
Project Manager: Chinna Subramaniam (TIS) (Responsible for day-to-day execution)
Technical Lead: Siddique Mohammed (Responsible for technical implementation)
Business Lead: Chinna Subramaniam (TIS) (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective:
This project aligns physical building access in real time with HR status. Access is automatically granted, modified, or revoked based on role changes or separation, eliminating orphaned credentials and reducing unauthorized access risk. It strengthens least-privilege controls and improves compliance across City facilities.

Problem Statement:
Increased on-site workforce requirements have raised building occupancy levels. Combined with disconnected systems and manual access management processes presents increased risk of unauthorized access and life safety incidents.

Proposed Solution:
Establish a citywide Secure Physical Identity and Access Management(PIAM) Program that integrates physical access control(PACS) systems with the City's enterprise IAM and HRMS platforms. This enables centralized, automated, real-time granting and revoking of building access across CCSF facilities.

Project Structure and Complexity

Project Structure:
The project is structured into six phases—Requirements & Analysis, Design & Architecture, Integration & Implementation, Data Reconciliation & Cleanup, Testing & Validation, and Operational Readiness—each with specific objectives, deliverables, and measurable outcomes. Go/no-go decisions and final approvals are governed through formal phase-gate reviews, with decision authority held by the stakeholders of the project.

Project Complexity: **Level 3 – Complex:**
Most CCSF departments operate separate physical identity and door badging systems, resulting in siloed processes and inconsistent access controls across the City. Because it spans multiple departments and technologies, the initiative represents a complex, cross-departmental integration effort. Several departments have already been identified to integrate their physical badging systems with the Citywide IAM platform as part of this initiative.

Project Schedule & Timeline

Est. Completion Date	Deliverable / Milestone	Brief Description
Jan 31, 2026	IAM – DT Badging Integration	Automated badging for DT badging system is operational
Jun 15, 2027	IAM – RED Badging integration	Automated badging for RED Badging system is operational
Oct 07, 2027	IAM – POL Badging integration	Automated badging for POL Badging system is operational
Dec 30, 2027	IAM – SHF Badging integration	Automated badging for SHF Badging system is operational
Mar 23, 2028	IAM – PDR Badging integration	Automated badging for PDR Badging system is operational
Jun 15, 2028	IAM – DAT Badging integration	Automated badging for DAT Badging system is operational
Sep 07, 2028	IAM – HSA Badging integration	Automated badging for HSA Badging system is operational
Nov 30, 2028	IAM – ADP Badging integration	Automated badging for ADP Badging system is operational
Feb 22, 2029	IAM – REC Badging integration	Automated badging for REC Badging system is operational
May 17,2029	IAM – DPH Badging integration	Automated badging for MTA Badging system is operational
Aug 09, 2029	IAM – MTA Badging integration	Automated badging for DPH Badging system is operational

High level plan available at https://app.smartsheet.com/sheets/ghJrq9Vc6gqc9W7wg9C2x5vc54Cq48q58CPHM881?view=grid&timelineGroupBy=3022065967654

High Level Project Spending Plan

Category	Description	FY2026-27	FY2027-28	FY2028-29
Personnel	Internal staff – New Full time Resource		**COIT $370,000**	**COIT $370,000**
Non-Personnel Cost	Professional services	**COIT $371,280**	**COIT $371,280**	
Technology Cost	Hardware, software	**COIT $100,000**	**COIT $30,000**	**COIT $30,000**
Access Card Cost	DHR Smartcard Procurement	**COIT $89,000**	**COIT $89,000**	**COIT $89,000**
Total Amount		**$560,280**	**$860,280**	**$489,000**

Operationalization and Resource Management

Operationalization:
As part of the implementation, beginning in Year 2, a full-time employee will be hired, and comprehensive knowledge transfer will take place to build internal expertise. By Year 3, this full-time employee will assume primary responsibility for leading the implementation and ongoing integration efforts. Once system integration is complete, maintenance and user and departmental support will transition fully into existing DT operational processes. To successfully execute this work, the project requires additional IAM team support staff to manage integration activities and ensure continuity of operations.

Resource Management:
Post go-live, the full-time employee serving as the Physical Identity primary will act as the main support resource for the IAM–physical system integration. Departmental resources that manage their respective physical identity systems will retain their existing roles and continue day-to-day operations. This resource model ensures continuity, resiliency, and long-term sustainability following implementation.

Stakeholder Analysis & Engagement

Stakeholders	Milestones	Motivation & Drivers	Anticipated Involvement	Activities
Controller Department	As owners of the HRMS system, the CON team involvement is required in the phases: Requirements & Analysis, Architecture & Design, Integration & Implementation.	Integrating HRMS with IAM and physical identity systems reduces manual processes, improves data integrity, and supports compliance, security, and operational efficiency across the City.	During Requirements & Analysis, Architecture & Design, Integration & Implementation phases high level of involvement is needed.	The HRMS team will work with IAM team to design and support the HRMS-to-IAM integration, enhance HRMS to send physical badge data, and assist with the one-time load of existing user badge information.
DHR	Members of the DHR team that provisions physical access for users their involvement is required in phases: Requirements & Analysis and post go-live operations	Automation improves the accuracy and efficiency of access card creation while reducing manual effort and errors. Integration with IAM and HRMS ensures timely, policy-aligned badging and strengthens overall security.	During Requirements & Analysis and Data Reconciliation & Cleanup phase high level of involvement is needed.	DHR team will be a part of the core process re-design process of issuing physical access cards. As owners of badge data, they will be critical part of Data Reconciliation & Cleanup.

Stakeholder Analysis & Engagement

Stakeholders	Milestones	Motivation & Drivers	Anticipated Involvement	Activities
RED POL SHF PDR DAT HSA ADP REC MTA DPH	As owners of the Badging system, the department team involvement is required in the phases: Requirements & Analysis, Architecture & Design, Integration & Implementation and Data Reconciliation & Cleanup.	Improves data accuracy, reduces manual reconciliation, and eliminates outdated or orphaned access. Integration with IAM and HRMS enhances security, simplifies audits, and allows system owners to maintain operational control while benefiting from centralized governance.	During Integration & Implementation and Data Reconciliation & Cleanup high level of involvement is required	Involving in integrating the Department physical badging system with IAM platform and data clean up.

Policy and Compliance Framework

Category of Compliance requirements	Description
Accessibility	The project does not introduce new user-facing screens.
Security & Privacy	Compliance is maintained by ensuring robust auditing and logging of all access activities in IAM.
Data Governance	Compliance is ensured by validating authoritative data sources and limiting data sharing to required attributes.
Procurement Regulations	n/a
Other	

Assumptions, Constraints, and Risks

Budget and Performance Support:

COIT Performance sub-committee can facilitate interdepartmental collaboration, ongoing oversight and timely decision-making.

Project Assumptions:

Availability of SMEs / Administrators of department badging systems. Existing badging systems support standard integration methods. Timely completion of procurement engagements when vendor support is needed.

Constraints & Risks:

Implementation is limited to the ten identified departments. Risk of existing badging systems not supporting standard integration methods. Inaccurate and / or delayed HRMS data could result in improper provisioning or de-provisioning of physical access.

Questions & Answers

Increase Data Center Resiliency (Network)
Department of Technology (DT)
February 27, 2026

Project Sponsor: Nathan Sinclair
Project Manager: Jason Renteria
Technical and Business Lead: Glacier Ybanez

Problem Statement & Solution

Project Objective: This project modernizes the City's Data Center network infrastructure to ensure resilient access to critical City network services and reduce the risk of outages that disrupt critical business operations. The scope includes replacing outdated infrastructure across data centers, right-sizing systems to lower ongoing support and licensing costs and building the network at the new resilient site to improve overall reliability. Key deliverables include adding backup connections to internet and cloud providers, building redundancy into the network with the new resilient site, and decommissioning legacy equipment to reduce operational risk and long-term maintenance expenses.

Problem Statement: The City's Data Center network infrastructure relied upon a single site that created single points of failure, increasing the risk of network service outages affecting critical City operations and thousands of daily users. Limited redundancy heightens the likelihood of internet or cloud connectivity disruptions, which can delay essential services, interrupt business processes, and reduce staff productivity. Without modernization, the City remains exposed to possible network service downtime, slower recovery from interruptions, and escalating maintenance expenses.

Proposed Solution: The recommended approach is an effort to make the City's Data Center network infrastructure resilient, ensuring connectivity to the internet, and cloud-based services, even if one data center experiences an outage. This includes building additional capacity and backup connections to the new resilient site, along with network infrastructure running parallel to the current site. The business case is centered on reducing costly downtime, protecting essential services such as public-facing applications and internal systems, and lowering long-term maintenance and support costs through consolidation and modernization.

Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	FY 2022-2023
Estimated Project End Date (Fiscal Year)	FY 2026-2027
Estimated Cost of Project	$1,885,000
COIT Allocation Received to Date (Total and Year)	$1,885,000 (FY 22-23: $950,000 / FY 23-24: $675,000 / FY 24-25: $260,000 / FY 25-26: $0)
COIT Allocation Spent to Date (Total and Year)	Total Allocation: $1,885,000 Cumulative spend: $1,581,540. Encumbrance: $17,175. Remaining balance: $286,285.
Available Project Balance	Available Balance: $286,285
Alternative Funding Sources (If any)	N/A
Alternative Funding Sources Received to Date (Total and Year)	N/A
Use of Funds to Date (Include any of the options provided or include others if necessary)	CCSF Labor, Hardware, Software, and Materials.

High Level Project Spending Plan

Category	Description	Q1 (July – Sept.)	Q2 (Oct. – Dec.)	Q3 (Jan. – Mar.)	Q4 (April. – June.)
Personnel	DT Outside Wiring Team installing redundant fiber connections.	**$75,000**	**$75,000**	**$100,000**	**N/A**
Non-Personnel Cost	N/A	**N/A**	**N/A**	**N/A**	**N/A**
Technology Cost	N/A	**N/A**	**N/A**	**N/A**	**N/A**

Project Schedule & Progress

Completion Date	Name of Milestone Completed	Brief Description
12/16/24	Resiliency strategy and high-level design	Strategy and design for resilient site
05/30/25	Install cabinet and electrical at resilient site	Location for network equipment
09/19/25	Core network and principal edge configuration	Core network services
01/30/26	Tertiary internet configuration	Tertiary internet
01/30/26	Send order for 100g internet at resilient site	Backup internet

Est. Completion Date	Name of Upcoming Deliverable / Milestone	Brief Description
06/30/26	Configure backup internet	Configuration complete, testing and failover to occur in FY26-27 per milestone below.
12/31/26	Add additional fiber from customer sites to resilient site	Resilient fiber connectivity for customer sites
06/30/27	Optimize firewalls, install additional fiber links between data centers, right size initial site network, and configure network resiliency	Final steps to enable resiliency for internet and network services between initial site and resilient site

Assumptions, Constraints, and Risks

Budget and Performance Support:

Emphasize to Departments to configure their applications to use the new services at the resilient site to take full advantage of the investment.

Project Assumptions:

Resource availability: Resources are not pulled from the project due to concurrent projects requiring similar resources.

Constraints & Risks:

Minimal Downtime Requirement: As this project impacts critical citywide services, minimizing downtime during implementation and testing phases is essential.

The need to work within limited maintenance windows and off-peak hours may extend project timelines and add complexity to planning. This constraint will be removed when there is full data center network infrastructure resiliency.

Questions & Answers

Adjournment

Thank you!