

# **City and County of San Francisco**

Committee on Information Technology

## **Budget and Performance Subcommittee**

### **Weekly Meeting**

Friday, March 6, 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 27, 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

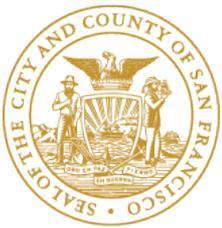
Approval of Minutes from February 27, 2026

Action Item

# **Item Number 6**

FY2026-28 Technology Project Proposals Presentations

Discussion Item



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

**Unified Data Platform**  
DataSF  
(Office of City Administrator)  
March 6, 2026

**Project Sponsor:** Soumya Kalra, Chief Data Officer  
**Project Manager:** Dan Tonkovich, Principal Data PM  
**Technical Lead:** Helen McLendon, Principal Data Engineer  
**Business Lead:** Cody Xuereb, Platform Ops

# Problem Statement & Solution

**Project Objective:** DataSF aims to transform San Francisco's fragmented departmental data landscape into a unified, trusted Unified Data Platform (UDP) by FY 2027-28. The project delivers a citywide single source of truth on Snowflake, enabling 80%+ of City departments to access reliable data products that directly support Mayoral priorities: PermitSF, Breaking the Cycle (homelessness), Public Safety, and Economic Revitalization. Success metrics include 50+ departments on UDP, 200+ active users, a certified data product catalog, and HIPAA/regulatory compliance by end of FY 2027-28. The current state is 20+ departments, 120+ users, 700+ datasets on a newly launched platform — strong early adoption but limited capacity to scale.

**Problem Statement:** San Francisco operates with 50+ departments managing data in independent silos, creating duplicated infrastructure costs, inconsistent metrics, and slow response for critical city services. Without additional staff and tooling investment, UDP adoption will stall and mayoral data priorities cannot be fully delivered. The platform currently has limited capacity to take on new advanced analytics requests, two Sr. Data Engineer roles are vacant, and growing department demand for HIPAA- and complex regulatory data environments cannot be met. The cost of inaction is delayed AI readiness, ongoing governance gaps, and inability to meet emerging compliance requirements that affect public safety and health services. In summary, the root cause of these current challenge are decade-long accumulation of siloed departmental systems with no shared infrastructure, governance, or data standards.

**Proposed Solution:** DataSF requests continued COIT funding to maintain and scale the Unified Data Platform — a cloud Snowflake data warehouse serving as SF's official single source of truth, combined with a Modern Data Stack (dbt, Azure Data Factory, Terraform, Posit). FY 2026-27 funding will harden platform security (RBAC, HIPAA masking, CJIS initiation), expand department onboarding, and build a Data Science portfolio. This centralized approach was selected over department-by-department solutions because it eliminates redundancy, enforces governance at scale, and directly advances Mayor Lurie's priorities for efficient City operations and AI readiness. In summary, a shared platform eliminates duplicated dept tooling; freemium model (\$1K/dept) lowers barriers; Snowflake Enterprise agreement locks in 12% professional services discount. Existing tech stack is as follows: Snowflake (warehouse) + dbt (transformation) + Azure Data Factory (ingestion) + Power BI (reporting) + Posit (data science)

# Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	FY 2025-26 (UDP platform launch + ASTRID)
Estimated Project End Date (Fiscal Year)	FY 2027-28
Estimated Cost of Project	\$5,564,133 total   UDP: \$3,539,133   ASTRID: \$2,025,000
COIT Allocation Received to Date (Total and Year)	UDP: \$310,000 (FY 25-26)   ASTRID: \$675,000 (FY 25-26)   Total: \$985,000
COIT Allocation Spent to Date (Total and Year)	FY 25-26 allocations fully committed to personnel (4 positions) and platform tooling (Snowflake EA, dbt, Azure Data Factory, POSIT)
Available Project Balance	FY 26-27 COIT allocation pending — requesting \$1,564,011 (UDP NP: \$889,011   ASTRID NP: \$675,000)
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)	CCSF Labor (1043, 1044 classifications) / Software & Cloud Services (Snowflake, dbt, Posit, Azure) / Professional Services & Implementation

# High Level Project Spending Plan

Category	Description	Q1 (July – Sept.)	Q2 (Oct. – Dec.)	Q3 (Jan. – Mar.)	Q4 (April. – June.)
Personnel	4x 1043s: full year (start Apr/May 2026) 3x UDP positions: start Jan 2027 (Q3 onward)	COIT \$136,257	COIT \$136,257	COIT \$276,887	COIT \$276,887
Non-Personnel Cost	Professional services, Snowflake enterprise support, onboarding implementation	Included in Tooling			
Technology Cost	Snowflake compute, dbt Cloud Enterprise, Posit, Azure Data Factory	COIT \$228,006 (annual renewals)		COIT \$114,000	COIT \$114,000
<b>Total Amount</b>		<b>COIT \$364,263</b>	<b>COIT \$136,257</b>	<b>COIT \$390,887</b>	<b>COIT \$390,887</b>

# Project Schedule & Progress

<b>Completion Date</b>	<b>Name of Milestone Completed</b>	<b>Brief Description</b>
<b>Jul 2025</b>	UDP Platform Launch on Snowflake	First departments onboarded; Snowflake-based data warehouse live citywide
<b>Sep 2025</b>	Citywide Data Management Policy Updated	New policy enables AI readiness, data quality and compliance standards citywide
<b>Oct 2025</b>	Snowflake Enterprise Agreement Secured	12% discount on professional services; multi-year compute discounts locked in
<b>Nov 2025</b>	HIPAA Business Associate Agreement (BAA) Acquired	Platform authorized to host Protected Health Information (PHI)
<b>Dec 2025</b>	17 Depts / 101 Users / 518 Production Datasets on UDP	ASTRID, PermitSF, and Large Vehicles Program data models live Onboarded Controller's office for Peoplesoft data
<b>Jan 2026</b>	Scaling new capabilities	Added Angie (Sr. Data Scientist) to build out Data Science capability; RBAC validation completed
<b>Feb 2026</b>	Data Quality Program for ASTRID	Building out strong data quality data quality metrics & documentation that be extended to other datasets

# Project Schedule & Progress

<b>Est. Completion Date</b>	<b>Name of Upcoming Deliverable / Milestone</b>	<b>Brief Description</b>
<b>Mar 2026</b>	Enhanced RBAC & Security Hardening	<ul style="list-style-type: none"><li>• Automated Role-Based Access Control via Terraform; Additional data security initiation</li><li>• DHR launched citywide position reporting</li><li>• Data Quality program for ASTRID underway</li><li>• Tooling: POSIT contract</li></ul>
<b>June 2026</b>	End-to-End Dept Onboarding Journey Launch	<ul style="list-style-type: none"><li>• Streamlined playbook enabling faster department migration and data product creation (already have 10+ depts in pipeline to launch)</li><li>• Peoplesoft expense data made available</li></ul>
<b>Dec 2026</b>	HIPAA Data Masking Validated in Snowflake	<ul style="list-style-type: none"><li>• HIPAA-compliant data handling tested and certified; enables sensitive health data use</li><li>• Transbase migration to support Vision Zero work</li><li>• Tooling: Enterprise contract for dbt</li></ul>
<b>Mar 2027</b>	Data Science Portfolio — ASTRID Predictive Models	<ul style="list-style-type: none"><li>• Predictive analytics for homelessness outreach prioritization under Breaking the Cycle</li></ul>
<b>Jun 2027</b>	Semantic Data Model Prototype + HIPAA Formal Certification	<ul style="list-style-type: none"><li>• Unified citywide metric definitions live; HIPAA formally enabled on UDP</li></ul>

Upcoming milestones target security hardening (H1), compliance certification, and advanced analytics capability (H2).

# Assumptions, Constraints, and Risks

## Budget and Performance Support:

**Procurement & Contracting:** DataSF in partnership manages a Snowflake Enterprise Agreement and is procuring dbt Enterprise and Posit. COIT advocacy for streamlined DT/Controller's procurement timelines would accelerate delivery.

**Interdepartmental Collaboration:** High-value use cases (HIPAA, PermitSF, Street Crisis Response) require formal data sharing agreements across departments. COIT endorsement helps accelerate these interagency MOUs.

**Stakeholder Engagement:** COIT signaling to department heads that UDP adoption is a citywide priority would accelerate onboarding of the next department cohort and reduce internal resistance.

## Project Assumptions:

**Resource Availability:** COIT funding enables hiring all 7 budgeted positions (3x 1043, 1x 1044, 1x 1052, 2x 1042). Two Sr. Data Engineer vacancies are actively being recruited.

**Technology Stability:** Snowflake, dbt, and Azure remain the core platform stack. Vendor relationships are stable; Enterprise Agreement runs through FY 2026-27.

**Regulatory Environment:** HIPAA BAA is in place. Continue to leverage environment for complex regulatory use cases.

**Stakeholder Alignment:** Continued executive sponsorship from the City Administrator's Office and active DT partnership are assumed and currently in place.

## Constraints & Risks:

**Budget:** FY 2027-28 tooling costs (\$500K) exceed current NP allocation by \$136,822. Additional COIT funding or department ISA cost-recovery will be needed to close this gap.

**Technical.** HIPAA certification remains on track for H2 2026.

**Regulatory:** Evolving state and federal data privacy requirements may require mid-cycle policy updates, adding compliance workload to the team.

**Capacity Risk:** Two Sr. Data Engineer vacancies constrain short-term delivery. Mitigated by Snowflake professional services included in the Enterprise Agreement.

**Adoption Risk:** Department onboarding pace depends on dept-side data steward availability. Mitigation: streamlined onboarding playbook launching Q1 FY 2026-27.

# Questions & Answers



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

**Centralized City Addressing**  
Department of Technology & Permit Center  
March 6, 2026

**Project Sponsor:** Jane Gong/Rebecca Villareal-Mayer (Accountable for project success and funding)

**Project Manager:** Robin Havens (Responsible for day-to-day execution)

**Business Lead:** Sam Valdez (Responsible for technical implementation)

**Technical Lead:** Teddy Sherbin (Responsible for business requirements and adoption)

# Problem Statement & Solution

**Project Objective:** Establish the Enterprise Addressing System (EAS) as San Francisco's single authoritative source for address data. By integrating nine departments by FY29, this project eliminates redundant manual reconciliation and provides the critical data foundation required for digital transformation projects like OpenGov and ensures data integrity for public safety.

Key Success Measures:

- **System Consolidation:** 100% integration of the nine permitting departments, eliminating the need for costly, department-specific addressing tools.
- **Operational Efficiency:** Synchronized data across all City systems to reduce permitting delays and manual staff reconciliation.
- **Scalable Infrastructure:** A robust technical foundation capable of rapidly supporting future City technology initiatives and evolving transformation needs.

**Problem Statement:** San Francisco lacks a unified address registry, forcing nine departments to maintain fragmented, conflicting records. Without a centralized system, the City cannot fully leverage its investment in the new OpenGov platform. San Francisco's lack of a single, authoritative address source impacts thousands of applicants annually, causing weeks of delays, and hundreds of hours of staff reconciliation.

**Proposed Solution:** Re-invest in the EAS to provide a scalable, enterprise-wide solution that aligns with PermitSF and DT strategic goals. We have formally rejected lower-efficiency alternatives—such as daily manual de-duplication—due to their prohibitive long-term costs and complexity. This approach ensures a modernized applicant experience and long-term operational cost savings.

# Project Structure and Complexity

**Project Structure:** The project will be executed in three phases: (1) planning/initial urgent enhancements, (2) three deployment phases, and (3) operational transition through FY26–FY29. Each phase includes key deliverables such as governance drafting, departmental onboarding, and EAS enhancements, with phase-gate reviews ensuring progress and risk mitigation. Quality assurance will include data validation and stakeholder sign-off before advancing. Decision authority rests with the Executive Sponsor, supported by DT’s EAS team and PermitSF leadership, with COIT oversight for approvals.

**Project Complexity:** Level 3: Complex (*\$1.5M–\$3M, 12–24 months, enterprise-wide impact, significant integration, custom development, high stakeholder coordination*).

- This project is complex due to its enterprise-wide scope, impacting nine permitting departments and thousands of users, and requiring integration with OpenGov and multiple departmental systems. Technical challenges include rapidly enhancing EAS functionality, synchronizing disparate datasets, and ensuring data integrity and comprehensiveness. Organizational complexity involves change management, training, and adoption across historically siloed departments. Additional factors include procurement of professional services, and coordination with COIT and interdependent projects.

# Project Schedule & Timeline

Est. Completion Date	Deliverable / Milestone	Brief Description
12/1/2025	Fire Address – Phase 1	Addresses needed for OpenGov Phase 1A
2/13/2026	OpenGov EAS Integration Launch	Integration of EAS and OpenGov launched and is live
4/1/2026	Port Address Migration to EAS Phase 1	Integrate available Port addresses to EAS. Backlog addresses without EAS match until enhancements completed.
FY26	Expanded Citywide location data survey	A questionnaire and two to three workshops would result in an initial inventory of City address requirements, protocols, and technology.
Summer 2026	Expanded governance	Deploy a citywide governance approach for addressing
FY27	Rapidly enhancing EAS functionality	EAS enhancements Richer attribution, Virtual addressing, Geographic coverage, e.g. More Port, SFO, and Rec & Park
FY27	Implement plan to centralize addresses for nine remaining permitting departments over three years	Phased loads of addresses for several more departments
FY27		
FY27		
FY28		

# High Level Project Spending Plan

Category	Description	FY2026-27	FY2027-28	FY2028-29
Personnel	1043 Full Stack Web Developer	DT: \$242,410 Permit Center: \$333,288  COIT: \$272,510	DT: \$242,410 Permit Center: \$359,288  COIT: \$272,510	Operational support
Non-Personnel Cost	Consultant to enhance Enterprise Address System	DT: \$100,000  COIT: \$150,000	DT: \$100,000  COIT: \$150,000	n/a
Technology Cost	Ex: Hardware, software, cloud services, integration, etc.			
<b>Total Amount</b>		<b>DT/Permit Center: \$675,698</b>  <b>COIT: \$422,510</b>	<b>DT/Permit Center: \$701,698</b>  <b>COIT: \$422,510</b>	

# Operationalization and Resource Management

**Operationalization:** The project will be operationalized by enhancing EAS functionality to support near term deployment of OpenGov’s consolidated permitting platform and by solidifying the role of EAS within the enterprise as a foundational information technology service over the longer-term with dedicated staff and governance structures.

- Comprehensive training, documentation, and a “Move to EAS” playbook will ensure knowledge transfer to operational teams, while MOUs will codify roles and responsibilities across departments.
- Performance metrics such as 100% departmental integration, address accuracy rates, and permitting turnaround times will track success and inform continuous improvement.

**Resource Management:** Project resources will be managed through a dedicated EAS team within DT, including two full-time positions (a 1043 full-stack, open-source, Web developer) supported by project management and professional services vendors during implementation. Extended team members from permitting departments will provide part-time subject matter expertise for integration and governance activities.

- Post-implementation, DT will maintain responsibility for system monitoring, performance optimization, and periodic updates, with clear MOUs defining departmental roles for address creation and maintenance.
- Training, documentation, and knowledge transfer will ensure operational teams can sustain functionality, while success metrics such as address accuracy and system uptime will guide ongoing performance management.

# Stakeholder Analysis & Engagement

<b>Stakeholders</b>	<b>Milestones</b>	<b>Motivation &amp; Drivers</b>	<b>Anticipated Involvement</b>	<b>Activities</b>
<b>Resident/permit applicants</b>	These stakeholders have already been engaged via the PermitSF initiative, via surveys and forums	We believe that these stakeholders are seeking clarity, certainty, and ease of use around City addressing	We anticipate a low level of involvement needed from these stakeholder due to pre-existing PermitSF engagement	The activities that have directly involved these stakeholder include PermitSF initiative surveys and forums
<b>City Departments</b>	Involvement from these stakeholders is needed throughout the project, as departments are integrated with EAS	We believe that these stakeholders are seeking easy integration and dependable access to addresses	We anticipate a high level of involvement needed from these stakeholders due to the impacts to their current operations	The activities that have directly involved these stakeholder include making agreements around shared used of EAS and clear protocols

# Policy and Compliance Framework

Category of Compliance requirements	Description
Accessibility	Accessibility will be considered during system design adjustments, user interface updates, and documentation; EAS is a back-end, non-public system so may not require significant adjustments.
Security & Privacy	The team embedded City cybersecurity-standards into the EAS plan, ensuring secure data handling and ongoing monitoring. EAS addresses are published as open data, so privacy compliance is not an issue for this project.
Data Governance	The team aligned the EAS plan to DataSF's Standards Guide to ensure accuracy, consistency, and Governance will include defined roles, MOUs, and quality checks to maintain integrity across permitting departments.
Procurement Regulations	The team integrated City procurement policies into planning to ensure transparent, compliant contracting and resource acquisition.

# Assumptions, Constraints, and Risks

## **Budget and Performance Support:**

COIT can support project success by streamlining procurement for needed services, aligning priorities across permitting agencies, and reinforcing governance. Their oversight of budget and performance will help keep the project on track and mitigate resource and compliance risks.

## **Project Assumptions:**

Initial assumptions on staffing, technology stability, governance, and engagement proved partly unrealistic. Three dedicated roles were added, governance gaps addressed, and change management prioritized, while EAS remains scalable with planned enhancements

## **Constraints & Risks:**

The project can start once funding is secured. Key challenges include budget limits for specialized staff and services, technical integration of legacy systems, and timeline pressures tied to OpenGov rollout. Risks around departmental capacity may require prioritization or added funding to meet PermitSF goals.

# Questions & Answers



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

**Financial Reporting Automation**  
Office of the Controller (CON)  
March 6, 2026

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

**Project Manager:** Michael Rottmayer (Responsible for day-to-day execution)

**Technical Lead:** Mary Perez, SF Financials Director (Responsible for technical implementation)

**Business Lead:** Jocelyn Quintos, Chief Accounting Officer (Responsible for business requirements and adoption)

# Problem Statement & Solution

**Project Objective:** This project aims to improve the timeliness and quality of City financial reporting as well as improve efficiency by implementing modern financial reporting software. Our goal is to consistently issue the Citywide ACFR within 150 days as the City Charter requires and have separate reporting units meet year end deadlines, all while reducing use of overtime.

**Problem Statement:** Since fiscal year 2018, the ACFR has only been issued within the 150-day legal requirement twice even with significant staff overtime. There are many reasons: a highly manual financial reporting process leading to inefficiencies and errors, review processes spread out over multiple documents using different software, a lack of integration between data sources, and inconsistent formatting and reporting practices across departments. This causes late financial statements, higher costs in staff time, and a lack of time for staff to perform more valuable analysis work. If a Citywide solution is not adopted, departments may adopt their own solutions which will make common solutions more difficult in the future.

**Proposed Solution:** The Controller's Office proposes to adopt a cloud-based platform for financial reporting. Citywide, there are more than 10 audits of individual funds in addition to the Citywide financial statements. This project would create a single platform with data linked directly from the PeopleSoft financial system. A common, shared platform will enable better data sharing and better cooperation among departments, improve efficiency and timeliness of financial reporting, improve the quality of analysis done by staff, and allow the City to access additional functionality of the platform in the future.

# Project Status

<b>Category</b>	<b>Description</b>
Year Awarded COIT Funding (Fiscal Year)	FY 2025-26
Estimated Project End Date (Fiscal Year)	FY 2029-30
Estimated Cost of Project	\$3.2 million
COIT Allocation Received to Date (Total and Year)	\$200,000 (FY 2025-26: \$200,000)
COIT Allocation Spent to Date (Total and Year)	\$100,000 through Q3 FY 2025-26
Available Project Balance	\$100,000 planned Q4 FY 2025-26
Alternative Funding Sources (If any)	CON budget, cost sharing with select Enterprise Funds
Alternative Funding Sources Received to Date (Total and Year)	CON: \$384,000 (FY 2024-25: \$245,000 / FY 2025-26: \$139,000) (Includes current CON staff)
Use of Funds to Date (Include any of the options provided or include others if necessary)	Software licensing and professional services for pilot project

# High Level Project Spending Plan (FY 2026 – 2027)

a	Description	Q1 (July – Sept.)	Q2 (Oct. – Dec.)	Q3 (Jan. – Mar.)	Q4 (April. – June.)
Personnel	Internal staff	CON: \$5,000	CON: \$5,000	CON: \$25,000	CON: \$25,000
Non-Personnel Cost	Professional services			COIT: \$100,000	COIT: \$100,000
Technology Cost	SaaS licenses & support	CON: \$19,812	CON: \$19,812	CON: \$19,812	CON: \$19,812
<b>Total Amount</b>		<b>CON \$24,812</b>	<b>CON \$24,812</b>	<b>CON/COIT \$144,812</b>	<b>CON/COIT \$144,812</b>

# High Level Project Spending Plan (FY 2027 – 2029)

Category	Description	FY2024-25	FY2025-26	FY2026-27	FY2027-28	FY2028-29
Personnel	Internal staff	CON: \$57,787	CON: \$59,829	CON: \$367,815	CON: \$183,907	CON: \$91,953
Non-Personnel Cost	Professional Services		COIT: \$200,000	COIT: \$800,500	COIT: \$81,100	
Technology Cost	SaaS licenses & support	CON: \$58,799	CON: \$79,248	CON: \$184,211	CON: \$193,421	CON: \$203,092
<b>Total Amount</b>		<b>\$245,386</b>	<b>\$139,077</b>	<b>\$1,352,526</b>	<b>\$458,428</b>	<b>\$295,045</b>

# Project Schedule & Progress

<b>Completion Date</b>	<b>Name of Milestone Completed</b>	<b>Brief Description</b>
January 2025	Pilot project complete	FY23 and FY24 ACFR
October 2025	Intent to Award contracts issued	Vendor selected and contract started

<b>Est. Completion Date</b>	<b>Name of Upcoming Deliverable / Milestone</b>	<b>Brief Description</b>
March 2026	Complete discussions with departments	Focus on AIR, PUC
June 2026	Catalogue and analyze non-PeopleSoft data	Determines a plan for which footnote and separate issuer data to optimize
June 2026	Execute contract	
September 2026	Begin PeopleSoft integration	
April 2027	Complete testing	
November 2027	Issue first ACFR leveraging full integration	

# Project Schedule & Progress

			FY24	FY25	FY25	FY25	FY25	FY26	FY26	FY26	FY26	FY27	FY27	FY27	FY27	FY28	FY28
Task	Begin	End	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Pilot Software Selection		Jun-24															
Pilot using FY23 and FY24	Sep-24	Jan-25															
Budgeting & Planning	Feb-25	Apr-25															
RFP for data integration	May-25	Oct-25															
FY25 ACFR	Sep-25	Dec-25															
Contracting	Dec-25	May-25															
ACFR Process Optimization	Feb-26	Jul-26															
FY26 ACFR	Sep-26	Dec-26															
Data Integration Phase Start	Dec-26	Dec-26															
Requirements Gathering and Planning	Dec-26	Dec-26															
Design	Jan-27	Jan-27															
Build	Jan-27	Feb-27															
Test	Mar-27	Mar-27															
Deployment	Mar-27	Apr-27															
Support / FY27 ACFR	Apr-27	Dec-27															
FY27 ACFR	Sep-27	Dec-27															

Color Code:

Pre-project activities

ACFR production periods

Implementation Consultant activities

# Assumptions, Constraints, and Risks

## **Budget and Performance Support:**

The COIT Budget and Performance Subcommittee can support this project by reinforcing the Mayor's Budget Office guidance regarding duplicative technology procurement and ensuring all departments that issue their own, separate financial statements (PUC, AIR, etc.) not only use the same tool as the Controller, but also leverage the same Citywide contract.

## **Project Assumptions:**

Successful completion of the project assumes key personnel on the ACFR team are available to assist with the implementation.

This is mostly under the control of department management. Long term success assumes departments that issue their own, separate financial statements will adopt the proposed solution.

## **Constraints & Risks:**

Key risks include:

The inability of the vendor to complete implementation tasks in a timely way, and

Scope creep which we have mitigated by limiting the scope to the Citywide ACFR using experienced ACFR staff for initial implementation.

# Questions & Answers



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

**Digital Personnel Records & Employee Intranet**  
Department of Human Resources (DHR)  
March 6, 2026

**Project Sponsor:** Mike Cotter (Accountable for project success and funding)  
**Project Manager:** Syd Heller (Responsible for day-to-day execution)  
**Technical Lead:** Matt Nelson (Responsible for technical implementation)  
**Business Lead:** Syd Heller (Responsible for business requirements and adoption)

# Problem Statement & Solution

**Project Objective:** The project aims to create a unified Citywide intranet that provides centralized content and digital HR service workflows that feed into a secure, digital personnel record. The project will establish a centralized repository with standardized data structures and automated workflows designed to reduce processing times and eliminate hours currently spent on manual, paper file handling and corrections. By transitioning to digital, Citywide workflows, the project will build toward a complete digital personnel record that is secure, permission-based, reportable, and scalable. Success will be measured through faster service delivery, improved access to strategic workforce data, and increased employee and HR satisfaction Citywide..

**Problem Statement:** Inefficiencies and inconsistencies across the city's HR systems have created significant operational and financial burdens, affecting all City employees and teams that support them. Manual, paper-based personnel record processes lead to service delays, bottlenecks, and staff hours lost annually, increasing labor costs and slowing critical HR transactions. These gaps contribute to employee frustration, reduced trust in HR services, and higher turnover risks, while also exposing the City to compliance, audit, and legal vulnerabilities due to incomplete or inaccessible records. The cost of inaction continues to rise as outdated systems strain resources, increase risks, and impede the City's ability to deliver timely, consistent, and equitable HR services.

**Proposed Solution:** The proposed solution is to implement a Citywide intranet that populates (through digital workflows) and presents digital personnel records using a modern, scalable technology stack that centralizes employee data, automates workflows, and provides secure, permission-based access for all authorized HR and operational users. Additionally, our solution leverages deep collaboration between DHR and departments to address complex, nuanced, needs and use cases across the City. This approach will reduce manual processing, minimize compliance risks, and provide reporting that support strategic decision-making, delivering measurable improvements such as a reduction in processing times and a substantial decrease in paper-driven errors.

# Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	FY 2022-23
Estimated Project End Date (Fiscal Year)	FY 2027-28
Estimated Cost of Project (includes new funding requests)	\$9.7 million (Received to date \$5.5M, FY26-27 \$2.1M/ FY27-28 \$2.1M)
COIT Allocation Received to Date (Total and Year)	<b>\$5.5 million</b> (FY 22-23: \$474,000 / FY 23-24: \$1,511,126/ FY 24-25: \$1,500,000 / FY 25-26: \$2,000,000)
COIT Allocation Spent to Date (Total and Year)	<b>\$5.2 million</b> (FY 22-23: \$307,381 / FY 23-24: \$1,399,342/ FY 24-25: \$1,110,962/ FY25-26: \$2,389,038)
Alternative Funding Sources (If any)	None
Alternative Funding Sources Received to Date (Total and Year)	None
Use of Funds to Date (Include any of the options provided or include others if necessary)	CCSF Labor, Partial ServiceNow licensing, Third Party Consultant for ServiceNow Development

# High Level Project Spending Plan

Category	Description	Q1 (July – Sept.)	Q2 (Oct. – Dec.)	Q3 (Jan. – Mar.)	Q4 (April. – June.)
Personnel	Internal staff	COIT-\$400,000	COIT-\$400,000	COIT-\$450,000	COIT-\$450,000
Non-Personnel Cost	Professional Services and Licensing		COIT-\$80,000	COIT-\$120,000	COIT-\$489,038
<b>Total Amount</b>		<b>COIT \$400,000</b>	<b>COIT \$480,000</b>	<b>COIT \$670,000</b>	<b>COIT \$939,038</b>

# Project Schedule & Progress

<b>Completion Date</b>	<b>Name of Milestone Completed</b>	<b>Brief Description</b>
10/8/25	Migrate DHR EEO app to SFMP	Rebuild DHR EEO in DHR ServiceNow (from DT)
10/23/25	Build infrastructure for ad hoc HR tasks	Views, flows, handling, for HR Agents to create tasks
12/4/25	Build expiration infrastructure for HR workflows	Current/Expired tracking, automatic “expiring” notifications
1/30/26	Migrate HR PeopleSoft Data to UDP Snowflake	Discover, define, and validate PeopleSoft HR data in UDP
2/11/26	Build Department Personnel Management Tool	Central dept contact list, managed by depts, routing-ready

\*Milestones listed above are the major milestones completed since last update and do not include the entire major deliverables to date.

<b>Est. Completion</b>	<b>Name of Upcoming Deliverable / Milestone</b>	<b>Brief Description</b>
4/30/26	Build DHR Onboarding Policies workflow	Workflow for employee to acknowledge DHR policies
5/31/26	Build Employee Preboarding workflows (x6)	“ESRs”: Conviction History, AP, Referral, Badge Request, Mass Hire
6/30/26	Build Alumni Portal	Create Portal for all Alumni. Need to collaborate with HSS and RET.
9/30/26	Build Extended Leaves workflow	Employee self-service request workflow, HR review, processing.
10/31/26	Build EEO intake (DRC) workflow	Digitizing DRC pdf form to flow to DHR EEO and automate EEO Complaint Case creation

# Assumptions, Constraints, and Risks

## Budget and Performance Support:

DHR has established strong partnerships with departments to support HR system improvements and collaboration. The COIT Budget and Performance Sub-Committee can add value by providing Citywide visibility into proposed or existing technology investments to help identify potential duplication.

This is particularly important where similar tools or parallel systems may be under consideration across departments. By elevating these opportunities early, COIT can help promote shared solutions and reduce redundant investments.

## Project Assumptions:

Through engagement with departments, it became clear that existing workflows varied significantly and required deeper evaluation to identify opportunities for optimization and standardization.

Additionally, while several paper forms and processes were initially identified for digitization, evolving City priorities—particularly the emphasis on establishing an official digital record—required us to reprioritize and sequence implementation accordingly. Balancing process improvement goals with broader Citywide digital record objectives remains an important consideration as the project continues.

## Constraints & Risks:

- 1) Workflow complexity and nuanced department needs – every Citywide app we develop has a very high degree of complexity and hidden nuance due to how varied processes can be across departments.
- 2) Content complexity and nuanced department needs – Deep collaboration with departments will be required in order build a centralized intranet with employee responsive content.
- 3) Undiscovered data complexity – there is an unknown around volume and complexity of data throughout the City that we will be looking to merge into centralized datasets within the intranet and digital personnel record

# Questions & Answers



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

**Government Procurement Software System**  
**City Administrator's Office (OCA)**  
**March 6, 2026**

**Project Sponsor:** City Administrator's Office (Accountable for project success and funding)

**Business Lead:** Sailaja Kurella (OCA) (Responsible for business requirements and adoption)

# Problem Statement & Solution

## **Project Objective:**

This project aims to implement a new software solution to support the City's public procurement functions, from initial contract request and solicitation development, through advertisement, evaluation, and final contract award. The software solution is expected to support the variety of government solicitation types including Requests for Proposals (RFP), Invitation for Bids (IFB), Request for Qualifications (RFQ), and Construction Bids.

The Office of Contract Administration within the City Administrator's Office is partnering with SFPUC on this project.

By supporting the complete solicitation lifecycle, this software implementation will create significant efficiencies, streamlining the procurement process for:

- 2000+ solicitations annually between the two agencies
- 75 procurement analysts
- 125 solicitation & contract development collaborators
- 300 managerial approvers
- 1000 buyers, program managers, and operations staff with procurement needs

Time-to-procure is expected to improve, as is competition, by simplifying the procurement process and increasing reach to potential vendors.

# Problem Statement & Solution

## **Problem Statement**

The City currently lacks a single, comprehensive and user-friendly solution for managing the procurement process.

- OCA utilizes functionality provided via SF Procurement, a component of the City's financial system. Advertisement and bid submission is handled within the system, while solicitation and contract development, evaluation, contract award, and approval workflows take place outside the system via various applications and systems, including the ServiceNow platform.
- SFPUC utilizes a custom-built system, SFBid, for its professional services procurements, while its construction solicitations are handled separately without the use of a procurement software system, instead relying on various standalone programs and tools.

## **These systems:**

- Currently require a high-degree of maintenance support;
- Would require a high-degree of new customizations to achieve the same functional capabilities as off-the-shelf SaaS systems currently on the market.

## **This leads to:**

- Reliance on disconnected tools and systems, creating Inefficiencies in the procurement process and impacting time-to-procure (current procurement ~6-12 months)
- Cost impacts and operational risks due to delayed procurement
- Cost impacts and inefficiencies to maintain separate systems and business processes
- Confusion and complexity for bidders, limiting competition
- Legal risks

# Problem Statement & Solution

## **Proposed Solution:**

The large volume and complexity of procurements under OCA's and PUC's purview necessitates a new procurement software system suitable for government practice. The departments are partnering to deliver a robust, reliable, and user-friendly procurement system that enables the efficient and cost-effective delivery of public services and capital projects.

### Off-the-Shelf SaaS Product

- The departments intend to procure an off-the-shelf, configurable SaaS solution requiring minimal customization.
- The solution is expected to provide robust reporting and analytics to allow to track various metrics, including project status, time-to-procure, competition and supplier engagement, and cost savings.
- Integrations between the new system and the City's financial system, as well as department sub-systems are contemplated.

### Supports Departmental and City-wide Strategic Goals

- The proposed project is intended to enable Citywide procurement transformation through innovation, early strategic inter-departmental partnerships, and operational excellence.
- Through this project, the two departments will jointly refine Citywide procurement business processes and standards with the goal of improving quality and level of service.
- Successful implementation is expected to enable broader adoption of a single procurement platform by City departments, allowing for a common user experience for suppliers and staff and common procurement standards and procedures across the City.

# Project Structure and Complexity

## **Project Structure:**

The software solution is expected to be closely aligned to departments' functional requirements. Ideally, the Contractor's solution will be "plug and play", such that the solution meets at least 85% of the requirements so that subsequent implementation and/or customization costs will be a minor portion of the total cost of use.

The departments may identify some additional functionality during the implementation phase to meet the complexity of City's processes and are open to engaging in business process reengineering to support a more streamlined way of doing business.

Expected milestones and deliverables are grouped into the following categories:

1. Project Initiation and Project Management
2. Business Process Gap Analysis, Planning and Finalization of Requirements
3. Business Process Reengineering and Design (Optional)
4. Custom Development (Optional)
5. Deployment and Configuration
6. Organizational Change Management
7. Systems Integration
8. Testing
9. Data Management, Migration and Data Security
10. Training
11. Reports and Analytics
12. Go-Live Activities
13. Maintenance and Post Go-Live Support

# Project Structure and Complexity

## **Complexity Level 2: Moderate (\$1M-\$1.5M, 6-12 months)**

- Multi-department coordination
  - Moderate system integration
  - Custom configuration required
  - Medium technical/operational risk
- 
- The project requires adoption of a new system to support the core function of two departments.
  - Impacted users at launch include approximately 75 procurement analysts, 425 collaborators and management approvers (e.g. CMD, City Attorneys, etc.), 1000 buyers, program managers, and operations staff, and external users (vendors)
  - The project expected to be moderately complex, requiring system configurations, some specific to each department, and integrations with ServiceNow, PeopleSoft (supplier data, requisition, PO, and contract data).
  - Adoption of the new system, affecting a moderately large user group, will require significant change management and training across a diverse user group (procurement analysts, department collaborators and approvers, and external vendors).
  - Business process changes resulting from the system implementation are expected to be moderate. While high-level solicitation steps will not change, the tools used by staff for each step in the process will change, requiring a change in some procedures and workflows.

# Project Schedule & Timeline

<b>Est. Completion Date</b>	<b>Deliverable / Milestone</b>	<b>Brief Description</b>
June 2026	Contract Execution and Project Initiation	Currently soliciting for the system
TBD	Business Process Gap Analysis, Planning and Finalization of Requirements; (tbd) Business Process Reengineering and Design	
TBD	Custom Development, if any	
TBD	Configuration; Organizational Change Management	
TBD	Systems Integration	
TBD	Testing	
TBD	Data Management, Migration and Data Security	
TBD	Training	
TBD	Reports and Analytics Development	
January 2027	Go-Live Activities	May launch as a pilot with specific groups or for specific contract types
Ongoing	Maintenance and Post Go-Live Support	
By July 2027	Additional Configurations or Customizations (tbd)	

# High Level Project Spending Plan

Category	Description	FY2026-27	FY2027-28	FY2028-29	FY2029-30	FY2030-31
Personnel	Internal staff	Depts. - \$528,100	Depts - \$264,050	Depts - \$132,025	Depts - \$132,025	Depts - \$132,025
Non-Personnel Cost	Professional services	COIT - \$100,000 Depts. - \$100,000	COIT - \$50,000 Depts.- \$50,000			
Technology Cost	Software	COIT - \$300,000 Depts. - \$300,000	COIT - \$300,000 Dept.- \$300,000	\$600,000	\$600,000	\$600,000
<b>Total Amount</b>		<b>COIT – \$400,000 Depts. - \$928,100</b>	<b>COIT – \$350,000 Depts. - \$614,050</b>	<b>\$732,025</b>	<b>\$732,025</b>	<b>\$732,025</b>

# Operationalization and Resource Management

## **Operationalization & Resource Management:**

OCA and PUC anticipate resourcing the implementation phase each with a project manager (1 FTE total) and several procurement staff as subject matter experts (approx. 1.5 FTEs total). The level of project management and SME support is expected to reduce over time as the project transitions to the maintenance and administration phase.

Internal systems administration staff will be identified and trained early in the implementation to support ongoing system operations and maintenance

A successful implementation of the selected software system is expected to lead to broader adoption by other City departments. The two partnering departments have already begun engaging various departments in assessing implementation goals and functional needs, as well as in the current solicitation process. Given the potential for broader adoption of a common procurement system/platform across multiple City departments, a steering committee is planned to allow for cross-departmental coordination and standard-setting.

# Stakeholder Analysis & Engagement

Stakeholders	Milestones	Motivation & Drivers	Anticipated Involvement	Activities
Purchasing and Contract Analysts, OCA and PUC	Implementation user testing and training phases.	Staff will be daily system users. The system must meet these users' business needs.	Procurement SMEs will have a high-degree of involvement; purchasing and contract analysts will be brought into implementation as needed.	Procurement staff will perform their core functions within the system daily.
TBD, Contracts Deputy City Attorneys (DCAs), CAT	Implementation requirements phase, and user testing and training phases.	Deputy City Attorneys are anticipated users of the system as solicitation collaborators (TBD). The system may be configured to accommodate CAT's business needs.	DCA SMEs are expected to be moderately involved in implementation.	DCAs will be daily users in the system, collaborating on solicitations and performing approval functions.
Regina Chan & CMD SMEs, LBE Program, CMD	Implementation requirements phase, and user testing and training phases.	Contract Monitoring Division staff are anticipated to be daily users of the system (solicitation collaborators) . The system must be configured to accommodate CMD's business needs.	CMD SMEs will have a moderate to high level of involvement.	CMD staff will be collaborating on solicitations in the system occasionally.
Jack Wood, Systems Division, CON & Supplier Management Team, CON	Continual (implementation and post go-live).	The new system will need to integrate with the City's financial and procurement system, including the Supplier, requisition & PO, Supplier Contract modules, and the SF City partner website.	CON Systems and Supplier Management teams will have a high degree of involvement.	The Controller's Office Systems Division and Supplier Management teams will be asked to provide integrations with the PeopleSoft system.
Steering Committee members, various departments	Throughout implementation; potentially post-go-live.	Steering Committee members will advise on implementation, provide for cross-departmental coordination and standard setting to ensure the system can meet other departments' needs.	The Steering Committee will be moderately involved.	No activities within the system, though members' departments may ultimately adopt the system
Operations and Program Staff, all departments	Implementation user testing and training phases.	Operations and Program Staff will use the system on a regular basis, so the implementation will need to take into account their needs.	Operations and Program SMEs will have limited involvement during implementation	Operations and Program staff are responsible for requesting contract/purchases, collaborating on solicitations, and tracking project status.

# Policy and Compliance Framework

Category of Compliance requirements	Description
Accessibility	The departments will ensure the system ultimately meets City and Federal accessibility requirements.
Security & Privacy	Project will undergo necessary cyber review as the system may handle some sensitive vendor data.
Data Governance	The departments are currently working with CON, CAO Government Operations division, and other department stakeholders to develop data governance standards for procurement data.
Procurement Regulations	The project will follow necessary procurement requirements (currently in solicitation phase).

# Assumptions, Constraints, and Risks

## Budget and Performance Support:

COIT Budget and Performance sub-committee may be able to provide support with inter-departmental coordination.

## Project Assumptions:

Limited risk of system instability is assumed.

Software system support in this industry is generally provided to procurement staff and external bidder/proposer users during business hours; the contract will include an SLA to address support levels and service risk.

Limited regulatory environment risk given mandated public advertisement processes are relatively fixed.

However, system configurations or customizations may be needed during the course of the contract to address changes to law that impact contracting.

## Constraints & Risks:

The systems currently in use may soon be nearing end-of-life, which could lead to reliability and legal risks.

Timely procurement and implementation of a new system is critical to avoid such risks.

Though the departments are in the solicitation phase, delays in procurement could affect the implementation timeline.

# Questions & Answers

Adjournment

Thank you!