City and County of San Francisco

Committee on Information Technology

Budget and Performance Subcommittee Weekly Meeting

Friday, March 20, 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 March 13, 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 March 13, 2026

Action Item

Item Number 6

FY2026-28 Technology Project Proposals Presentations

Discussion Item

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

Disaster Recovery for Critical City Technology Applications

Department of Technology
March 20, 2026

Project Sponsor: Michael Makstman and Nathan Sinclair (Accountable for project success and funding)
Project Manager: Kamroonbanu Mohideenbasha (Responsible for day-to-day execution)
Technical Lead: Todd Law (Responsible for technical implementation)
Business Lead: Todd Law (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective

This project ensures CCSF's Tier 1 systems stay online during disruptions or are restored quickly after an outage. Aligned with COIT DPR3 Policy and the City's Technology Resilience Standard, we'll identify and validate all Tier 1 applications, assess recovery readiness, and close the highest-risk gaps. That includes setting clear resiliency baselines, standing up cloud or secondary recovery environments where needed, and automating secure backups. By FY28–FY29, 100% of Tier 1 systems will meet defined RTO and RPO targets—validated through regular disaster recovery testing—so essential City services remain reliable for departments and residents.

Problem Statement

Disaster recovery capabilities vary widely across departments, leaving some Tier 1 systems without reliable backups or proven recovery environments. When outages occur, recovery can be slow, manual, and unpredictable. These gaps delay critical services, increase operational and financial risk, and weaken public trust. As the City becomes more digitally dependent, the impact of outages grows—and the cost of doing nothing keeps rising.

Proposed Solution

We will implement a standardized disaster recovery framework for all Tier 1 applications, prioritizing systems by service impact and risk. The solution modernizes recovery using cloud or secondary environments, automated backups, and routine recovery testing to ensure RTO/RPO targets are met. This approach reduces downtime, speeds restoration, and strengthens resiliency across departments. Siloed, department-by-department solutions were rejected due to higher cost and inconsistent results. The proposed solution directly supports City priorities for service reliability, operational resilience, and public trust.

Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	FY 2024-25
Estimated Project End Date (Fiscal Year)	FY 2028-29
Estimated Cost of Project	$4,887,530
COIT Allocation Received to Date (Total and Year)	$1,027,506 (FY 24-25: $977,506/ FY 25-26: $50,000)
COIT Allocation Spent to Date (Total and Year)	$112,789 till date;
Available Project Balance	Available Balance: $914,717
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 / Software / Implementation / Materials / Other Services

High Level Project Spending Plan: FY 2025-26

Category	Description	FY 25-26 (Jul – Sep)	FY 25-26 (Oct – Dec)	FY 25-26 (Jan – Mar)	FY 25-26 (Apr– Jun)	Total
Personnel	3-1043 DR Specialist	$0	$0	$83,943	$167,886	$251,829
Technology Cost	DR Backup and Replication Solution	$0	$0	$28,846	$57,692	$86,538
Total				$112,789	$225,578	**$338,367**

Costs	FY 24-25	FY 25-26
Funds Received	$977,506	$50,000
Carry forward	0	$977,506
Funds Spent	0	-$338,367
Funds Available	**$977,506**	**$689,138**

High Level Project Spending Plan: FY 2026-29

Description	FY2026-27	FY2027-28	FY2028-29
Total Project Cost	$977,506	$977,506	$977,506
FY26 Carryforwards	-$689,138		
	$288,368	**$977,506**	**$977,506**

Breakdown of Funding Ask:	FY2026-27	FY2027-28	FY2028-29
Technology Cost- DR Backup and Replication Solution	$250,000	$250,000	$250,000
Office of Cybersecurity - Senior DR Specialist (1043)	$242,502	$242,502	$242,502
Office of Cybersecurity - Senior DR Specialist (1043)	$242,502	$242,502	$242,502
Network Infrastructure - Senior Network Engineer (1043)	$242,502	$242,502	$242,502
Carry forward	-$689,138		
Total:	**$288,368**	**$977,506**	**$977,506**

***Carry Over Balances*:** FTE cost carryforward resulting from hiring freeze and recruitment delays.
Note: Staffing costs will be operationalized over the next two fiscal years.

DR for Critical City Applications: Planned FY26/27

Target Timeline	Goals (Business Outcome)	Key Results & Practical Outcomes
Feb–Dec 2026 (Baseline assessment; ongoing updates thereafter)	Ensure the City has a reliable accurate understanding of resilience for its most critical services	1. 100% of departments complete resilience assessments for Tier 1 systems 2. Tier 1 applications (e.g., public safety, financial, permitting systems) are clearly identified and consistently classified 3. Tier 1 inventory validated against Cybersecurity and Controller records, resolving gaps in ownership, hosting, or recovery expectations
Feb–Dec 2026 (Initial prioritization; refreshed on a rolling basis)	Reduce the risk of prolonged service outages by identifying and prioritizing resilience gaps in Tier 1 systems	1. All Tier 1 systems assessed for backup and disaster recovery readiness 2. High-impact gaps documented and risk-ranked based on service impact 3. A prioritized Tier 1 gap list guides investment and sequencing decisions
Jan 2027 – June 2029: Operational After (Multi-year transition	Transition Tier 1 systems to resilient, recoverable architectures **&** Demonstrate the City's ability to recover critical services during disruptions	1. By May 2027, at least 50% of Tier 1 systems are hosted in the cloud or have an approved plan and timeline for a secondary recovery system 2. Foundational backup solutions protect the City's highest-impact applications 3. By December 2027, 100% of Tier 1 systems are operating in the cloud or have an approved recovery plan, with leadership visibility into protection status and remediation schedules 4. Backup restoration and initial disaster recovery tests completed for Tier 1 systems 5. Recovery tests confirm applications meet defined recovery time objectives (RTOs), with issues tracked and resolved before real incidents

Assumptions, Constraints, and Risks

Budget and Performance Support:

We need COIT budget and performance support to fund cloud backups, disaster recovery, and system testing. Help with contracts and vendors will speed things up. Departments must stay aligned on Tier 1 priorities and funding. Ongoing tracking will help us measure RTO/RPO progress toward FY28–FY29 goals.

Project Assumptions:

Departments will confirm their Tier 1 systems and take part in readiness assessments. We expect to have the right technical staff and vendor support for implementation and testing. We also assume security, compliance, and policy requirements remain stable.

Constraints & Risks:

Limited budget may slow cloud migration and recovery improvements. Legacy systems, integration challenges, and compliance requirements could delay progress. Staffing limits and competing priorities may impact timelines. Unexpected outages or emergencies could also shift resources.

Questions & Answers

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

HRise Project

Department of Public Health

March 20, 2026

Project Sponsor: Jenny Louie (Accountable for project success and funding)
Project Manager: Fredy Dorsainvil & Tobi Skotnes (Responsible for day-to-day execution)
Technical Lead: Todd Riley (Responsible for technical implementation)
Business Lead: Kimberlee Walden (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective

The HRise project addresses SFDPH's current manual and fragmented HR, scheduling, timekeeping, and workforce management processes. The initiative will deliver an enterprise-wide workforce management, timekeeping, and scheduling solution that replaces outdated, disconnected tools and manual processes.

The platform will integrate seamlessly with key City systems including PeopleSoft, SmartRecruiters, and DHR ServiceNow to support streamlined, accurate, and compliant operations. The project's scope includes implementing a modern, cloud-based solution that enhances efficiency, data quality, and the staff experience. Implementation will follow a phased approach over the next 18 months to ensure smooth adoption and operational readiness.

Problem Statement

Current HR and payroll processes rely heavily on manual data entry across multiple disconnected systems. Because information must be re-entered and reconciled by hand, daily operations slow down significantly. Staff spend valuable time on administrative tasks instead of higher-value work, which increases the risk of errors and affects overall service delivery. These challenges stem from the lack of enterprise-wide systems that can support complex staff scheduling and integrated HR workflows.

Proposed Solution

The HRise initiative represents the San Francisco Department of Public Health's (SFDPH) enterprise modernization of workforce management, timekeeping, scheduling, and related analytics capabilities. This project implements UKG Pro Workforce Management and Advanced Scheduling as the core platform, supported by CloudApper integration services and Improvizations implementation services under the certified Vertosoft contract. The implementation replaces legacy systems (OneStaff, HRiMS, HRiMS+) with a single, integrated, secure, cloud-based solution designed to improve staff safety, compliance, payroll accuracy, operational efficiency, and data driven decision making across hospitals, clinics, behavioral health, jail health, and administrative functions. The project is structured in two waves over approximately 18 months, with Wave 1 focused on Workforce Management and Scheduling and Wave 2 expanding into Talent, Learning, and HR automation

Project Structure and Complexity

Project Structure

The HRise project is structured in two waves over an 18-month timeline.

Wave 1: Workforce Management and Scheduling.

UKG modules will be implemented to support workforce structures and position control, hourly timekeeping and leave management, advanced scheduling across clinical and non-clinical areas, credential-based scheduling enforcement, payroll interfaces tested through three parallel payroll cycles, staff onboarding, analytics and dashboards for HR and managers, and cost-allocation reporting.

Wave 2: Talent, Learning, and HR automation.

UKG modules for talent acquisition integration with SmartRecruiters, performance and coaching, learning management, HR case management, and expanded onboarding and provisioning workflows. All vendor deliverables must be formally reviewed and approved by DPH prior to moving to subsequent phases. Governance for the project includes an Executive Group that meets biweekly to review progress and resolve escalations, and dedicated workstreams composed of core project members and subject matter experts that meet weekly.

Project Complexity: Level 3

The HRise project is highly complex, affecting nearly all DPH staff and requiring multiple system integrations. The scheduling and timekeeping components will touch every department, while integrations span internal systems such as MDstaff, ServiceNow, Lenel, and Epic, as well as Citywide systems including PeopleSoft, SmartRecruiters, DHR ServiceNow, and Snowflake. To support these Citywide integrations, DPH is coordinating closely with partners at CON and DHR to align timing and resources. To prepare the organization for the changes ahead, DPH's Office of Change Management has been engaged, alongside vendor-led change management and training efforts launching this month. This combined approach ensures readiness, consistency, and stakeholder alignment throughout implementation.

Project Schedule & Timeline

Est. Completion Date	Deliverable / Milestone	Brief Description
3/6/2026	Wave 1: Initiation & Governance	Project Kickoff, identification of key stakeholder and governance model , charter completion
7/30/2026	Wave 1: Requirements & Solution Design	Completion of requirements gathering and solution design for the modules and integrations in the Wave 1 scope
8/17/2026	Wave 1: Build	Completion of build/configuration of the modules in alignment with the solution design
8/17/2026	Wave 1: Integrations	Completion of integrations configuration and testing
12/7/2026	Wave 1: Testing	Completion of modules and integrations testing, including 3 parallel payroll tests
2/26/2027	Wave 1: Training & Change Management	Completion of training for end users and change management support/strategy
1/23/2027	Wave 1: Cutover	Completion of data conversion and go-live readiness activities
3/7/2027	Wave 1: Go-Live	Go-Live of the new HRise functionality and modules
3/10/2027	Wave 1:Hypercare & Project Close	Completion of stabilization and project close

Project Schedule & Timeline

Est. Completion Date	Deliverable / Milestone	Brief Description
3/31/2027	Wave 2: Talent Acquisition	Requirements gathering, build, testing and deployment of the module.
4/15/2027	Wave 2: Performance & Coaching	Requirements gathering, build, testing and deployment of the module.
4/30/2027	Wave 2: Learning Management	Requirements gathering, build, testing and deployment of the module.
5/15/2027	Wave 2: People Assist	Requirements gathering, build, testing and deployment of the module.
5/31/2027	Wave 2: Document Manager	Requirements gathering, build, testing and deployment of the module.
7/1/2027	Wave 2: Employee Voice	Requirements gathering, build, testing and deployment of the module.

High Level Project Spending Plan

Category	Description	FY2026-27	FY2027-28	FY2028-29	FY2029-30	FY2030-31
Personnel	Ex: Internal staff, external resources, training, and overhead	DPH: $1,156,052 (Calendar Year 2026 Cloud Apper+Improv time according to Appendix B-3)	DPH: $485,700 (Calendar Year 2027 Cloud Apper+Improv time according to Appendix B-3)			
Non-Personnel Cost	Ex: Facilities, professional services, contingency planning, etc					
Technology Cost	Ex: Hardware, software, cloud services, integration, etc	DPH- $427,140 (Calendar Year 2026)	DPH- $1,641,750 (Calendar Year 2027)	DPH- $1,708,125 (Calendar Year 2028)	DPH- $1,708,125 (Calendar Year 2029)	DPH- $1,708,125 (Calendar Year 2030)
Total Amount		DPH- $1,583,192 (Calendar Year 2026)	DPH- $2,127,450 (Calendar Year 2027)	DPH- $1,708,125 (Calendar Year 2028)	DPH- $1,708,125 (Calendar Year 2029)	DPH- $1,708,125 (Calendar Year 2030)

Operationalization and Resource Management

Operationalization
The HRise business lead, technical lead and executive sponsors are all heavily involved in the project implementation allowing for continuity and sustained support for the system. As part of the contract the vendor will be providing trainings and point people within DPH will be responsible for ensuring new staff get the appropriate training.

Resource Management
The project is structured around three levels of governance and participation. The first and highest level is the Executive Sponsors, who meet biweekly to review progress and make key project decisions. The second level is a core leadership group representing IT, HR, Nursing, and Operations. This group also meets biweekly to monitor overall progress and ensure that the appropriate subject matter experts are engaged across the various workstreams. The third level consists of the workstreams themselves, each made up of subject matter experts responsible for system configuration and contributing their knowledge to support a successful implementation.
For ongoing operations, the IT division is ramping up to support this solution in alignment with the standard support model used for other enterprise applications.

Stakeholder Analysis & Engagement

Stakeholder Analysis – HRise project stakeholders are primarily DPH staff, with the addition of CON and DHR staff that support City systems that the HRise project will integrate with. All stakeholders have been engaged and involved from the project onset – attending scoping sessions and the project kickoffs.

Stakeholders	Milestones	Motivation & Drivers	Anticipated Involvement	Activities
DPH Staff Kimberlee Walden	Requirement gathering, build, testing and implementation of all modules.	Stakeholder is the Business Owner for the project	As the business owner Kimberlee is very involved in the project, attending all Exec and Workstream meetings pertaining to HR and payroll.	All meetings and builds that impact HR and payroll.
CON People&Pay Loretta Cheung	Requirement gathering, build, testing and integration of HRise modules with People&Pay	This integration is needed to ensure staff are paid.	Involved in discussions, configuration and testing of People&Pay integration for payroll	All PeopleSoft integration meetings
DHR Mike Cotter	Requirement gathering, build, testing and integration of HRise modules with DHR systems	This integration is needed to ensure successful hiring and pre-employment onboarding of staff.	Involved in discussions, configuration and testing of DHR system integrations.	All DHR Systems integration meetings

Policy and Compliance Framework

Compliance requirements	Description
Accessibility	The HRise RFP asked for WCAG compliance.
Security & Privacy	DPH conducted 3rd party risk assessment per the City's requirements.
Data Governance	Regulatory compliance reviewed with DPH Privacy, Compliance and data governance committee members.
Procurement Regulations	Vendor was awarded contract after completing the RFP process and attesting to City requirements.
Other	N/A

Assumptions, Constraints, and Risks

Budget and Performance Support:	Project Assumptions:	Constraints & Risks:
N/A	Resource are available as scheduled and decisions are provided in a timely manner.	Due to recent budget cuts, resource availability remains a risk to the project. CON is also undergoing a code freeze/upgrade to People&Pay which informs the timing of the project, specifically the PeopleSoft integration.

Questions & Answers

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

Epic Lumens

Department of Public Health

March 20, 2026

Project Sponsor: Natasha Lalani and Justin Sewell, MD (Accountable for project success and funding)
Project Manager: Travis Ayers (Responsible for day-to-day execution)
Technical Lead: Natasha Lalani (Responsible for technical implementation)
Business Lead: Justin Sewell, MD, Patty Coggan, Juliet Palarca (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective

The goal of this project is to transition workflows currently managed in ProVation to Epic's standard tools. This change will enhance integration of images, documentation, and follow-up tracking within Epic, ultimately improving efficiency and patient care.

- Lumens, Epic's endoscopy reporting tool, supports your staff as they schedule, perform, result, and follow up on gastrointestinal and pulmonology procedures.
- With Lumens, Users can document findings, connect findings to the appropriate images, and create procedure reports.
- Lumens is integrated with Epic's application suite, which means that gastroenterologists and pulmonologists can access the most up-to-date information about the patient's procedure, including specimens taken, medications administered, and procedural events.
- Epic Lumens provides population management options that have potential to support interventions to improve overall CRC screening uptake in the patient population served by DPH. This in turn has potential to diagnose and prevent cancer, and reduce incidence of, and mortality from, CRC in the DPH service population.

Problem Statement

Epic Lumens is fully integrated into the Epic EHR, which streamlines scheduling, documentation, billing, patient outreach and analytics across one system. It improves clinical workflows by reducing system switching and giving providers immediate access to comprehensive patient information. Lumens also enhances quality reporting and compliance.

Proposed Solution

The proposed solution is to transition from ProVation to Epic Lumens to consolidate all endoscopy documentation, scheduling, imaging, and billing within the Epic ecosystem. This eliminates fragmented workflows and reduces the need for multiple interfaces or duplicate data entry. Epic Lumens also strengthens quality reporting and regulatory compliance, and other Gastrology and Pulmonology metrics. The unified system supports more efficient clinician workflows and better access to complete patient information. Overall, the switch provides a more integrated, enterprise-wide solution that improves consistency, data quality, and operational efficiency.

Project Status

Category	Description
Project Kickoff Meeting	11/20/2025
Project Charter Sign-off	12/9/2025
Implementation: Build Phase and System Configuration	11/20/2025 - 3/30/2026
Testing: Application and Integrated Testing	2/17/2026 - 4/1/2026
Testing: User Acceptance Testing	4/1/2026 - 5/31/2026
Archival of ProVation Data into Harmony	TBD
Training: Training and Shadow Charting	5/31/2026 - 7/27/2026
Go-Live	August to September 2026
Optional: System Optimization	As Needed

High Level Project Spending Plan

Category	Description	Y2026		Y2027	Y2028	Y2029
Implementation Cost	License Fees Implementation Fees Training	$1,058,967				
Technology Cost	Middleware Hardware Image storage Epic Maintenance fees			$68,524	$68,524	$68,524
Total		$1,058,967		$68,524	$68,524	$68,524

Project Schedule & Progress

Completion Date	Name of Milestone Completed	Brief Description
11/20/2025	Project Kickoff Meeting	
12/9/2025	Project Charter Sign-off	Define the project scope and establish all deliverables, milestones, and deadlines.
11/20/2025 - 3/30/2026	Implementation: Build Phase and System Configuration	Epic application design sessions with operations and Epic Analyst build of the application

Assumptions, Constraints, and Risks

Budget and Performance Support:	Project Assumptions:	Constraints & Risks:
N/A	An Epic resource will be assigned to help DPH IT Epic Team to lead implementation. Operational project stakeholders will take necessary training as needed. Changes to scope will follow a formal change control process and will need to be approved by the executive sponsors. This project will use the ELT domain governance process to document needs for Epic optimization and prioritize the requests. Operational project sponsors (or designated leaders) will be responsible for operational change management strategy and approach for workflow change communication and adoption.	Storing historical images: to be compliant with the 10 year's worth of data requirement, 3 years of images from ProVation will need to be archived into Harmony. The images will be from the period of October 2016 through August 2019. IT resource constraints due to other Epic implementations (i.e. Breast Imaging Module, Unified Communications, Hrise, BHS, ect.) Contracts related to the project; medical scopes, middleware, image storage, application fees.

Questions & Answers

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

Radio Replacement Project

Department of Emergency Management
March 20, 2026

Project Sponsor: Michelle Geddes, DEM CIO.
Project Manager: Juan Soto, IT Director, Public Safety & Infrastructure
Technical Lead: Simon Williams, Public Safety Radio System Manager/ CCSF/Motorola Solutions
Business Lead: Multiple (DEM, SFFD, SFPD, SFSO, SFMTA-DPT, DT)

Problem Statement & Solution

Problem Statement Prior to the upgrade, the City relied on an aging analog radio system that had reached end-of-life, resulting in reduced reliability, limited capacity, lack of encrypted communications, and constrained interoperability with regional public safety partners.		
Radio Replacement Project Objectives & Deliverables:		**Applied Solutions:**
Modernize the City's radio infrastructure	➔ Replacing aging, discontinued analog systems that were degrading communications reliability.	Implemented Motorola ASTRO 25 P25 Phase 2 TDMA system, improving citywide interoperability, capacity, and coverage. Supports Public Safety and Public Service users in a digital TDMA simulcast cell and integrates with CCSF systems through Core Consolidation (700 MHz Interoperability and SFIA subsystems). 180-Day Burn-In Test completed (5/6/2022 – 11/2/2022); system performed as expected.
Improve interoperability across City departments and with regional public safety partners	➔Enhance Mutual Aid and Interoperability	Core Integration and Implementation of ISSI 8000
Enhance operational security	➔ Implementing encrypted digital communications.	System was upgraded to AES-256 Encryption

Financial Forecast

COIT Request FY2027: $1,875,436

Issuer	City & County of San Francisco
Issue	N/A
Series & Project	2016 Lease Purchase Financing (Public Safety Radio Replacement Project)
Dated Date	12/16/2016
Original Par Amount	$34,184,136
Outstanding Par Amount	$9,089,235
Callable Par Amount	$14,361,083
Next Call Date	6/1/2023
Final Maturity	12/1/2026
Final CUSIP	Private Placement

Fiscal Year		Principal	Coupon	Interest	DS	Add'l Rental	DS & Add't R
2023	2023	3,470,200	1.699%	258,672	3,728,872	11,000	3,739,872
2024	2024	3,529,409	1.699%	199,463	3,728,872	11,000	3,739,872
2025	2025	3,589,628	1.699%	139,244	3,728,872	11,000	3,739,872
2026	2026	3,650,875	1.699%	77,997	3,728,872	11,000	3,739,872
2027	2027	1,848,731	1.699%	15,705	1,864,436	11,000	1,875,436

Project Status

Project successfully completed and the system is operating reliably. Minor work related to system enhancement is ongoing.

Maintenance and Support Agreement (Contract No. 41337-1516) was executed to support the radio program upgrades and ongoing system maintenance. The agreement is active from **July 1, 2017, through June 30, 2035**.

The Service Upgrade Agreement (SUA) within the Maintenance agreement includes the following services:

Service Type	Description	Frequency
Motorola Security Patch - Consoles	Upload security patches to all radio consoles across the system.	Quarterly
Motorola Security Patch – Radio System	Upload security patches to all systems Virtual Machines.	Quarterly.
Software and Hardware Upgrades	Radio System upgrades to the latest release available, including replacement of network devices.	Two-year Circle.

Project Status

Description	Included
Infrastructure Repair Service with Advanced Replacement	√
System and Network Monitoring Service (24/7/365)	√
Motorola Systems Support Center	√
Dispatch Service and Case Management	√
4-hour On-Site Support 24x7 Motorola Field Service (FSO)	√
Technical Support Service	√
Infrastructure Preventative Maintenance	√
Security Update Service (MotoPatch)	√
Security Monitoring Service	√
Disaster Preparedness	√
Customer Support Plan	√
System Upgrade Services / Lifecycle Plan (SUA)	√
Subscriber Radio Services Repair Bank	√
Third Party Maintenance and Upgrades	√
Motorola Customer Hub	√

Radio Maintenance Program: Schedule & Progress

Completion Date	Name of Completed Milestone	Brief Description
October 2024	Radio System Software and Hardware upgrade	Update the Radio System, including all Console sites to the latest available release.
October 2024	Genesis Assisted-Dispatch Interface (GADI) Upgrade	Dispatch Application Upgrade
November 2024	Radio Logger (NICE) and INFORM Update.	Logger application upgrade.
September 2025	Genesis GenWatch Upgrade	Radio Management Application Upgrade
October 2025	MPLS Network Software Update	Comprehensive software upgrade to the entire network.

Completion Date	Name of Upcoming Deliverable / Milestone	Brief Description
April 2026	Radio Network Upgrade (Juniper Upgrade)	Replacement over 90 routers and switches.
June 2026	MPLS Network Audit (Radio Backhaul)	Full audit and corrective maintenance.
October 2026	Radio System Software and Hardware upgrade	Update the Radio System, including all Console sites to the latest available release.
October 2026	Genesis Assisted-Dispatch Interface (GADI) Upgrade	Dispatch Application Upgrade
November 2026	Radio Logger (NICE) and INFORM Update.	Logger application upgrade.

Radio Upgrade Agreement (RUA) Program

RUA Program Description:

- The Radio Project Team, in coordination with the Mayor's Budget Office, negotiated the **Radio Upgrade Agreement (RUA)** with Motorola to replace a portion of the City 800 MHz portable radios over a 10-year period at an approximate 60% discount, from FY2020 to FY2029.
- City agencies leverage the **RUA program** to obtain portable, mobile, and control station radios, including accessories and chargers.

RUA Order Summary:

- More than $6 million in budgeted orders, with additional procurements made through change orders have been placed.

Year	Orders Value	Taxes
2020	-	-
2021	-	-
2022	$ 999,097.63	$ 86,172.17
2023	$ 1,203,440.82	$ 103,796.77
2024	$ 1,910,503.35	$ 164,780.91
2025	$ 1,629,509.65	$ 140,545.21
Sub-total	$ 5,742,551.45	$ 495,295.06
Total		**6,237,846.51**

Questions & Answers

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

Port Modernization

Port of San Francisco

March 20, 2026

Project Sponsor: Mike Martin (Accountable for project success and funding)
Project Manager: Monica Lim (Responsible for day-to-day execution)
Technical Lead: Sasha Magee (Responsible for technical implementation)
Business Lead: Meghan Wallace (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective

The Port Technology Modernization Project is focused on building and implementing a data-rich, constituent-and user-focused, integrated system that not only increases efficiency but, also unlocks formerly unsupported capabilities and provides analytical insights that were not previously available.

Problem Statement

The core systems that are utilized throughout the Port: PROPWorks, The Marina Program and Oracle EAM, are well past their end of life and pose significant risk to the continuing operation of the Port's businesses. Not only do these legacy tools pose a direct threat due to their age and reduced vendor support, they also limit the growth opportunities for our business lines. These risks were rated severe in the Port's 2014 Strategic Plan and the risk posed by these systems has only risen since then. The Port's legacy tools also provide no common ecosystem, no common language, and no organic data sharing. Without this interconnectivity, cross-functional reporting is non-existent in most cases, and where it does exist it is highly manual. Data sharing between systems is, likewise, a manual process, eating staff time and creating an elevated risk to data integrity due to human error.

Proposed Solution

The Port will be replacing these applications primarily with one system, based on Salesforce, which is widely used across the City. We will be developing our new system in a user-centric, iterative and agile manner. We anticipate the project will take 4 years to complete, although we expect to deliver the first usable software well within the first year.

Project Structure and Complexity

Project Structure

PRT will proceed in 3 major phases:

1. Planning (in progress): This includes identifying business capabilities, defining root assets, process mapping, foundational user research and beginning the staffing process.
2. Execution: This will be an iterative process where in each iteration, we define the capability we will deliver to our users. Once the capability is useful, we will deploy it and move on to the next iteration, while continuing to refine it and other already-implemented functionality.
3. Refinement: Once we have basic functionality complete, we'll continue to refine that functionality based on business needs and user feedback.

It's important to point out here that since we are working in an agile, user-centered fashion our plan does not include an extensive requirement definition period nor does it include an extensive UAT phase. In addition, by involving users throughout the development, we will be creating ambassadors for the new system throughout the development process.

Project Complexity - Level 4: Transformational

The project will impact the entire Port, and transform much of the Port's day-to-day work, from accepting credit card payments to dispatching workers on maintenance calls. Although we will integrate with new systems like Snowflake, there will be some reduction in intersystem complexity, as this project will replace two enterprise-scale systems and several smaller applications. We anticipate significant change management challenges, which we aim to mitigate by involving staff from every division within the Port in the system's creation and by delivering value consistently.

Project Schedule & Timeline

Est. Completion Date	Deliverable / Milestone	Brief Description
September 2025	Research	The Port engaged Gartner Consulting to create a Business Capability Model, SWOT Analysis, Pace Layering and Assessment, Application Inventory.
Q4 25-26	Planning	Steering Committee to identify Business Capabilities, define root assets. Foundational user research and staffing processes begin.
Q4 29-30	Execution	An iterative process wherein each iteration, we define the capabilities we will deliver to our users and assemble a representative working group of those users to help define the minimum set of functionality that will satisfy that capability. We will then deliver that functionality incrementally to the working group for feedback and testing, and to enable them to become familiar with the new functionality. Once the capability is useful to our working group, we will deploy it and move on to the next iteration, while continuing to refine it and other already-implemented functionality.
Ongoing	Refinement	Once we have basic functionality complete, we'll continue to refine that functionality based on business needs and user feedback.

High Level Project Spending Plan

Category	Description	FY2026-27	FY2027-28	FY2028-29	FY2029-30
Personnel	Staff	$1.65M	$1.85M	$1.95M	$2.0M
Non-Personnel Cost	Consulting Services	$0.6M	$0.35M	$0.15M	$0M
Technology Cost	Software Licensing	$0.65M	$0.8M	$0.9M	$1.0M
Total Amount	***Department Only***	**$2.9M**	**$3M**	**$3M**	**$3M**

Operationalization and Resource Management

Operationalization

Every increment of the development of the project will involve active participation from members of Port staff. Through subject matter specific working groups, we will engage staff early and often in the development of use cases that impact their work and draw on their expertise. Engaging staff in this way will give influential members of the staff a stake in the success of their work and help them to become change champions among their peers. As the project enables new methods and ways of working, we will be developing trainings for staff as well as hosting drop-in sessions and integrating the new system into our regular support system. Additionally, we have hosted quarterly town halls to update Port staff on the project and will continue to do so as the project progresses.

Resource Management

The Port currently has a staff of two people responsible for supporting and maintaining enterprise applications. That staff is receiving ongoing training to participate in the development of the applications' replacement and then transition to providing support, maintenance and incremental improvement for the new system. By engaging our career staff in the development of our new system we will leverage their institutional knowledge of the Port's business practices and processes. Their participation in the creation of the new system will also ensure that the Port maintains technical ownership and understanding of the system.

Stakeholder Analysis & Engagement

Stakeholders	Motivation & Drivers	Anticipated Involvement	Activities
Executive Director	Permanent role. Successful transition. Useful data to guide business decisions. Lowered risk.	Consultation and guidance. Championing project within the Port and in the City at large.	Monthly updates and discussions resulting in improved approach to foundational data definition. Contributed to creating Project Charter and is a key sponsor.
Deputy Directors	Success of their division. Modern software enabling modern best business practices.	Designation of staff for working groups. Approval of approach. Important source of user needs for analysis and data capabilities of the system.	Regular consultation with each individual Deputy. Bimonthly updates to Deputies as a group. User research focusing on Business Intelligence.
Line staff	Easier work. Understandable changes.	Working groups to help guide path forward in relevant areas. As user research subjects. As early users and reviewers of new capabilities.	We have identified our first working group. We will implement first user-facing improvement this month, automating a half-day process for several employees.
City technical experts	Provide expertise. Make other departments (e.g. us) successful.	Providing subject matter expertise. Advice on other sources of expertise. Salesforce experience.	We have begun conversations with experts across the city, including DT, DataSF and Assessor, TTX, that have yielded some early insights that are guiding our initial approach.

Policy and Compliance Framework

Category of Compliance requirements	Description
Accessibility	While we anticipate that Salesforce will provide a solid accessibility grounding for our new system, we will be regularly testing our work both using automated tools and with staff members with disabilities.
Security & Privacy	Although we believe there will be no data in the system above Level 3, we are holding security as a high priority. While we believe that Salesforce provides a secure starting basis for our system, we will be conducting security design reviews, tabletop exercises and conducting threat modeling to ensure we act on security as a priority.
Data Governance	Again, while we don't believe any data in the system will rise above level 3, we will be continuously evaluating our approach to data to ensure we are using due care. We will also be evaluating opportunities to make data available to other city departments or the public, where they might gain benefit from it.
Procurement Regulations	We are partnering closely with our procurement team to ensure all requirements are met.
Other	N/A

Assumptions, Constraints, and Risks

Budget and Performance Support:

The Port looks to the COIT Budget and Performance sub-committee to facilitate active conversations with technology leaders to collaborate and foster the exchange of technological solutions and information.

Project Assumptions:

Salesforce continues to be a viable solution and the City continues to have a stable procurement mechanism for licenses.

The current systems do not experience catastrophic failure before the new solution has been fully implemented.

Port Modernization Project has continued support from Port Executives through leadership transitions.

Constraints & Risks:

Risk of the legacy systems failing prior to replacement and being no longer viable.

Risk of an emergency creating demands on Port budget that require reallocation of funds from this project.

Port employees have been promised modernization multiple times in the last decade and have not experienced any progress, so they may be skeptical of new initiatives.

Questions & Answers

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

PermitSF Portal

Planning, Building Inspection, Permit Center, Mayor's Office

March 20, 2026

Project Sponsor: Elizabeth Watty and Ned Segal (Accountable for project success and funding)
Project Manager: Sarah Bindman / Zoya Khan (Responsible for day-to-day execution)
Technical Lead: Zoya Khan (Responsible for technical implementation)
Business Lead: Bridget Hicks (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective

The project aims to make it faster and easier to build housing and open businesses in San Francisco. For example, San Francisco must build 82,000 homes by 2031 to meet statewide housing goals, but has only built 1700 homes in 2024, so the rate would need to increase by 6x. Permits for homes and restaurants can take 2-4 years, which is why the cost of opening a business is 4x higher in SF than the nationwide average. The PermitSF Portal will deliver a fast, simple, transparent online permitting experience for San Franciscans that will serve all permitting Departments within the next three years with the first launch already complete as of February 13, 2026. Ideally, we will be able to cut permit processing times in half for thousands of residents applying for hundreds of thousands of permits each year.

Problem Statement

San Francisco uses over 30 different permitting software systems across over ten different Departments. This makes it hard for staff to collaborate and have clear roles and accountability and for residents to know where to start, have predictable timelines, or receive clear answers. Residents often spend 4-8 hours waiting at the permit center for 2-3 permits. Our first phase launch shows that 25% of applicants are now able to access permitting services after hours due to the first phase of the new online system. The rate of permit applications per week has doubled compared to February last year, while we are still able to turn around and issue permits in 2-3 days. To move the majority of Departments and permits onto the PermitSF Portal and deliver the fast, simple permitting experience that San Francisco needs to revitalize our economy, we need substantial financial support from COIT.

Proposed Solution

This initiative executes the Mayor's very first Executive Directive to reform permitting through technology. The approach consists of using OpenGov – and potentially AI plan review tools like CivCheck and Archistar – to deliver a centralized, online permitting portal that serves all Departments. If we can cut processing times by 50%, we can issue more permits more quickly and substantially increase the City's permit revenue. We can also expand our tax base of businesses and homeowners, thus contributing to economic vitality and City financial health. We chose OpenGov due to their ability to implement software on time and on budget, in contrast with multiple other City permitting vendors, and the February 13th launch has demonstrated that this approach was effective.

Project Structure and Complexity

Project Structure

PermitSF has already delivered on Phase 1a of our project with five permit types launching to the public on February 13th. Phase 1b extends through July 2026, and we will follow this up with Phase 2 through 2027 and Phase 3 through 2028. Phase 1B will deliver another subset of Fire and Building Permits, Phase 2 will finish up construction permits and public health permits, and Phase 3 will focus on other business and events permits. We will launch permits every 2-3 months in an agile, flexible fashion, which will give us multiple checkpoints each year for quality assurance. At the end of Phase 1b, we will complete a comprehensive contract and project review before entering into any multi-year extensions. Leadership from the PermitSF team and the Mayor's Office will make technical and business decisions to ensure focused delivery.

Project Complexity

This Level 4 project will affect at least 12 Departments and require services from additional Departments like DT and Digital Services. We will need to retire multiple systems of record (Accela, Oracle, Healthscape) and integrate with Bluebeam and PeopleSoft. Rolling it a few permits at a time with 2-3 Departments will enable us to manage change systematically. A Core Team with technical and business expertise will manage contracting, vendor oversight, and inter-departmental decisions. The February 13th launch demonstrate the success of this model.

Project Schedule & Timeline

Est. Completion Date	Deliverable / Milestone	Brief Description
Feb 2026 (Delivered)	Phase 1a go-live	Launch initial Fire/DBI/Special Events permits; begin stabilization & feedback loop.
Jun 2026	Phase 1b go-live	Launch additional Fire and DBI permits; incorporate learnings from Phase 1a to drive continuous improvement
Jul 2026	Phase 2 contract	Receive BOS approval for Phase 2 contract
Sept 2026	Phase 2 kick off	Have staffing, granular delivery milestones, and governance structure ready for Phase 2
Feb 2027	Phase 2a go-live	Launch construction permits; begin stabilization and feedback loop
August 2027	Phase 2b go-live	Launch additional construction and public health permits; incorporate learnings to drive continuous improvement
September 2027	Phase 3 kick off	Have staffing, granular delivery milestones, and governance structure ready for Phase 3
Feb 2028	Phase 3a go-live	Launch special events and business permits; begin stabilization and feedback loop
August 2028	Phase 3b go-live	Launch additional business permits; incorporate learnings to drive continuous improvement

High Level Project Spending Plan

Category	Description	FY 2025-26	FY2026-27	FY2027-28	FY2028-29	FY2029-30
Personnel	Ex: Internal staff, external resources, training, and overhead					
Non-Personnel Cost	Ex: Facilities, professional services, contingency planning, etc	DBI - $1,500,000 Fire - $400,000	Departments - $1,500,000	COIT - $1,000,000 Departments - $500,000		
Technology Cost	Ex: Hardware, software, cloud services, integration, etc	DBI - $4,000,000	COIT - $3,500,000 Departments - $50,000	COIT - $3,500,000 Departments - $50,000		
Total Amount		**Depts - $5,900,000**	**COIT–$3,500,000 Dept. – $1,550,000**	**COIT–$4,500,000 Dept. – $550,000**		

Operationalization and Resource Management

Operationalization

We will continue using our proven methodology for training and documentation with Departments leading the development of SOPs, two weeks of dedicated training per launch, and super-users to provide peer support. In the second phase, we will have a more robust Core Team and have a designated project sponsor, project lead, change management lead, and SMEs to develop SOPs in each Department. We already have a small set of public metrics on the PermitSF Performance page that help us to focus on meeting ambitious Service Level Agreements for customers. OpenGov is a vendor that has a demonstrated track record of providing both policy and technical updates to ensure that the software remains modern and responsive in the long term. The long term home for the cross-departmental PermitSF Portal will be the Permit Center/Planning/DBI Department.

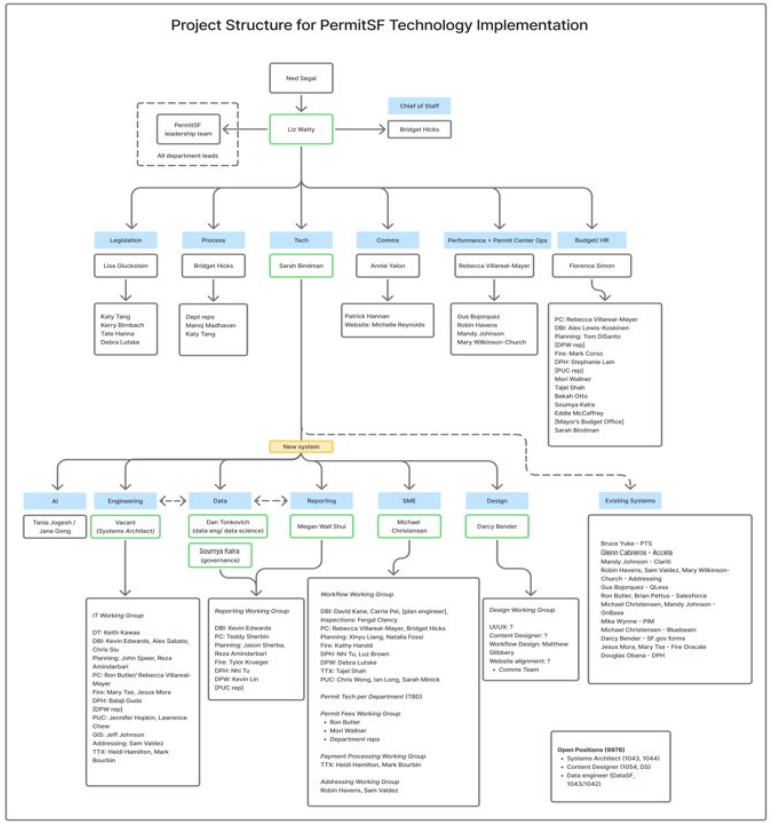
Resource Management

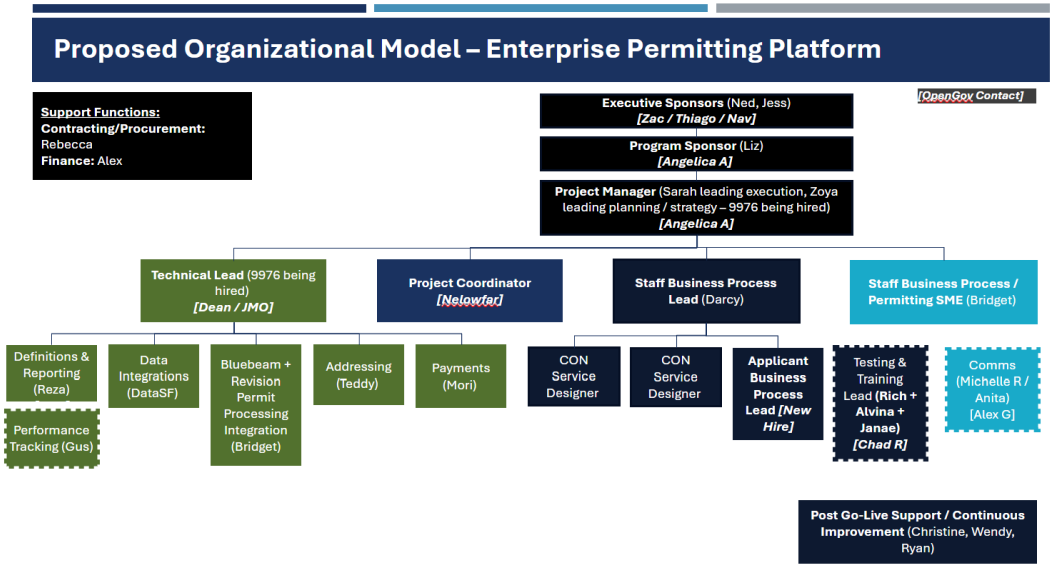
We will continue to have a small Core Team with strong executive sponsorship from Liz Watty and Ned Segal and a mix of product management, data, and design skillsets supported by contracting, SOP, public affairs, and customer support leads. Most of the staff will coming from the Permit Center/Planning/DBI Department, which is hiring two more 9976 technical project managers to supplement the Core Team. In addition to a ~15 person Core Team, we will assign Departmental leads as described above and also leverage the skillsets of a Systems Architect from DT to support long-term integration and architecture needs. OpenGov will provide significant implementation support (up to ~8 in person resources per week, as they have in Phase 1) and be responsible for maintaining the system according to the SLAs set forth in the existing contract.

Stakeholder Analysis & Engagement

Stakeholders	Milestones	Motivation & Drivers	Anticipated Involvement	Activities
City staff – please see chart on next page	They will work on all aspects of discovery, validation, configuration, testing, and training	Permitting is part of their core business and this is our City's best shot to modernize permitting	They will provide subject matter expertise and drive decisions	We have assigned them to specific roles and scopes
Customers	Testing and feedback during User Acceptance Testing and Launch phases	Thousands of customer end users need the permits	A focus group of 15-20 will participate in 30-60 minutes of testing and interviews	We have dedicated designers working with customers
Commissions – Building Inspection Commission, Fire Commission	Review during end of configuration	Critical to their Department's success in customer service delivery	They will meet with us once or two to learn about the software	We have dedicated project leads working with Commissions

Stakeholder Analysis & Engagement – Supplemental Stakeholder Chart





Policy and Compliance Framework

Category of Compliance requirements	Description
Accessibility	We have a specialized service designer (Anita Chung) working to ensure that all PermitSF webpages hosted on sf.gov are accessible. We have other designers flagging and prioritizing accessibility issues for OpenGov to address.
Security & Privacy	OpenGov meets all City SSO and user account requirements and is already in use.
Data Governance	We are storing all data on the City's Snowflake system. PermitSF/DBI/Planning has the final decision on data governance and is working closely with DT and TTX on City-wide datasets.
Procurement Regulations	We worked closely with OCA and obtained a 21.30 waiver after an extensive RFI process. We are going to seek BOS approval for the Phase 2 contract.
Other	This brings the City into compliance with AB 920 (centralized housing portal requirement).

Assumptions, Constraints, and Risks

Budget and Performance Support:

COIT can support us on the inter-departmental budget management process. This has taken a lot of back and forth from MOI, DT, and various participating Departments.

COIT can probably help us to set up a structure that requires less ad hoc problem solving and a more consistent structure to receive money and pay the vendor. Guidance on milestone-based payment verification would also be helpful.

Project Assumptions:

Assumptions include timely vendor delivery against am ambitious, agile delivery plan; sustained participation of permitting departments for requirements, testing, and training; and availability to integrate with existing City software and systems for addressing, payments, document management, etc.

Phase 1 has validated our agile deployment approach against ambitious milestones. Phases 2–3 will scale that proven structure with expanded department change champions.

Constraints & Risks:

Capacity and resourcing risk will require mitigation from clear roles and responsibilities and sustained focus and prioritization from leadership.

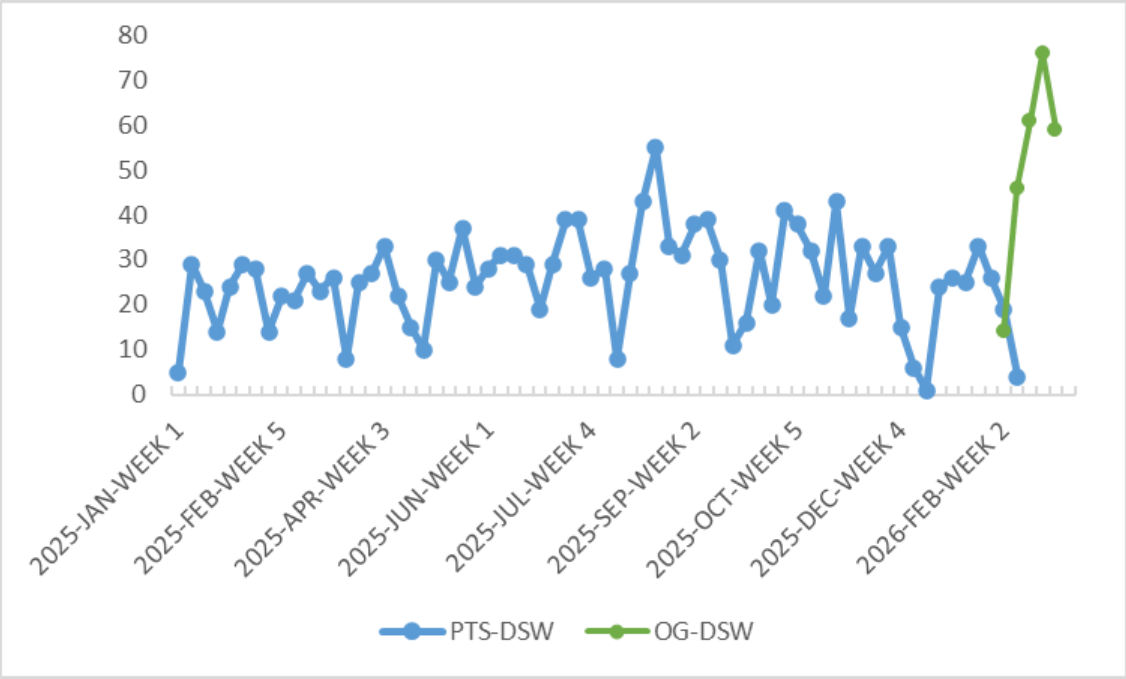
Vendor management will require clear scopes of work and milestone-based payments that enable enforcement of expectations.

Cross-Departmental ownership will require clear governance structures. Software adoption will require thoughtful, structured testing and training approaches and continuous feedback, testing, and learning to deliver increased value to users.

Addressing data quality risk will require collaboration with DT and all Departments.

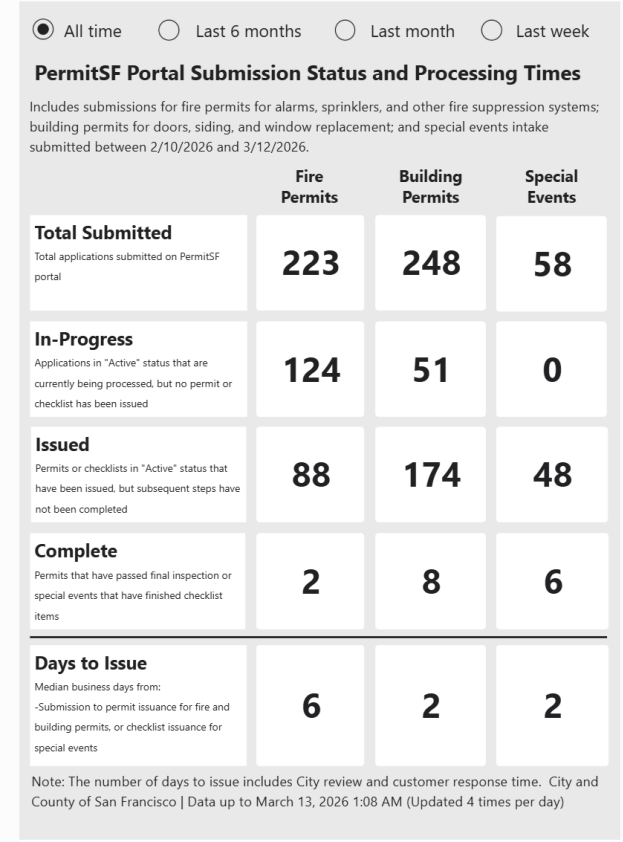
Appendix 1:

Applications have increased since the launch of the PermitSF Portal



Appendix 3:

We are making significant progress on our ambitious two-day issuance goal



(◉) All time ( ) Last 6 months ( ) Last month ( ) Last week

PermitSF Portal Submission Status and Processing Times

Includes submissions for fire permits for alarms, sprinklers, and other fire suppression systems; building permits for doors, siding, and window replacement; and special events intake submitted between 2/10/2026 and 3/12/2026.

	Fire Permits	Building Permits	Special Events
Total Submitted Total applications submitted on PermitSF portal	223	248	58
In-Progress Applications in "Active" status that are currently being processed, but no permit or checklist has been issued	124	51	0
Issued Permits or checklists in "Active" status that have been issued, but subsequent steps have not been completed	88	174	48
Complete Permits that have passed final inspection or special events that have finished checklist items	2	8	6
Days to Issue Median business days from: -Submission to permit issuance for fire and building permits, or checklist issuance for special events	6	2	2

Note: The number of days to issue includes City review and customer response time. City and County of San Francisco | Data up to March 13, 2026 1:08 AM (Updated 4 times per day)

Questions & Answers

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

Data Governance – BI Platform Change

CON-Systems

March 20, 2026

Project Sponsor: Jack Wood (Accountable for project success and funding)
Project Manager: Raymond Loui (Responsible for day-to-day execution)
Technical Lead: Ana Contreras (Responsible for technical implementation)
Business Lead: Prakash Ganapa (Responsible for business requirements and adoption)

Problem Statement & Solution

Project Objective

To modernize the City's Business Intelligence and Data Governance Framework by:

- Replacing the legacy Oracle OBIEE platform with Snowflake & Power BI
- Establish a unified citywide data governance structure to ensure data security, quality, and consistency across departments
- Reduce operational inefficiencies and cost by eliminating redundant reporting systems and improving transparency and compliance
- Deliver actionable insights through advanced analytics tools to enable better decision making for City leaders
- Complete migration of 42 Subject Areas (e.g. Budgets vs. Actuals, General Ledger, HR, Procurement) over two fiscal years while maintain continuity by running Oracle OBIEE and the new platform in parallel while we transition to the new platform.

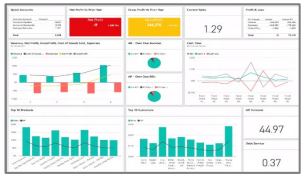
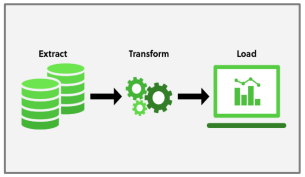
Problem Statement

The City's legacy Oracle BI platform is no longer sustainable, costing over $800,000 annually in support while providing limited value as it functions primarily as a data-export tool and will reach end-of-support in December 2026. Transitioning off this system requires rebuilding hundreds of proprietary PeopleSoft-delivered data transformations from scratch. The SF Reports & Analytics Team, is still developing expertise in Snowflake, dbt, and Power BI, making the reconstruction of complex logic significantly more difficult. Furthermore, the lack of a unified data governance framework across 55+ departments has resulted in fragmented data standards, inconsistent compliance practices, and elevated operational and financial risks, undermining the effectiveness of any modern BI platform.

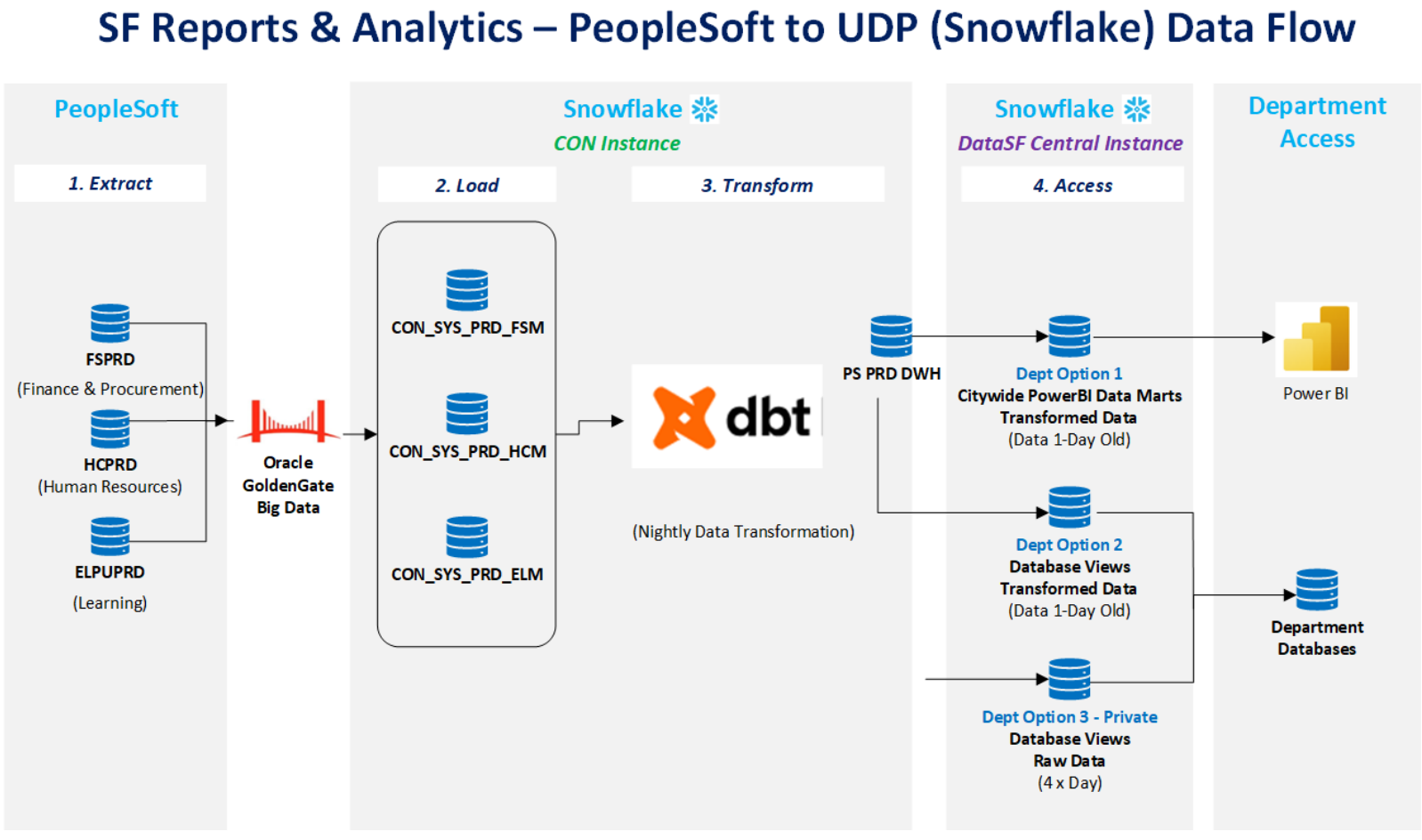
Proposed Solution

The recommended solution is to modernize SF Reports & Analytics by transitioning from Oracle OBIEE to a cloud-based BI architecture using Snowflake, Power BI, and dbt Labs while simultaneously implementing a Citywide Data Governance Framework. This integrated approach ensures that the 42 subject areas migrated into the new BI platform follow standardized data definitions, quality rules, compliance structures, and ownership models—eliminating the fragmentation and duplicative efforts that currently impede reporting accuracy. The combined initiative strengthens operational efficiency, reduces compliance and fraud risks through centralized quality controls, and provides City leaders with a single, reliable source of truth for financial, procurement, and workforce decisions.

Proposed Solution

	Layer	Current Tool	Future Tool
	Front End / Visualizations	Oracle BI	Microsoft PowerBI
	Extract-Transform-Load	Oracle OBIA (off the shelf)	Oracle Golden Gate Big Data (Extract/Load) dbt Labs (Custom Transformations)
	Database	Oracle	Snowflake

Future State Architecture



Citywide Data Governance

Objective: To establish a unified, citywide data governance framework that enhances **transparency, accountability, and operational efficiency** by ensuring **data security, quality, and consistency** across all City departments. This initiative will: **Define clear systems of record** to eliminate duplication and discrepancies

- **Define clear systems of record** to eliminate duplication and discrepancies
- **Improve efficiencies and reduce costs** through standardized data practices and streamlined operations.
- **Enhance compliance and mitigate risks** by enforcing citywide adherence to local, state, and federal regulations.
- **Increase accountability and transparency** in City business processes, fostering public trust.
- **Enhance user experience** for City departments, suppliers, and the public through accessible, well-structured data.
- **Empower City leaders** with accurate, real-time insights and tools to drive data-informed policy and operational decisions

Project Status

Category	Description
Year Awarded COIT Funding (Fiscal Year)	**FY 2025-26**
Estimated Project End Date (Fiscal Year)	**FY 2027-28** (dependent on COIT funding)
Estimated Cost of Project	**$7.5 million**
COIT Allocation Received to Date (Total and Year)	**$200k** – FY2025-26
COIT Allocation Spent to Date (Total and Year)	**$95k** – FY2025-26
Available Project Balance	**$105k** to be spend by 6/30/26
Alternative Funding Sources (If any)	**N/A**
Alternative Funding Sources Received to Date (Total and Year)	**$0**
Use of Funds to Date (Include any of the options provided or include others if necessary)	$57k Prof. Services (Define Approach & Effort) $25k Training (Snowflake, Power BI, Azure Data Factory) $11k dbt Cloud Licenses $ 2k Snowflake Consumption **$95k Spent to date**

Project Spending Plan: Current Year FY2026

Category	Description	Funding	Q1 (Jul. – Sept.)	Q2 (Oct. – Dec.)	Q3 (Jan. – Mar.)	Q4 (Apr. – Jun.)	Total FY2026
Personnel	Internal Staff	CON	154,761	201,587	274,351	312,896	943,595
Non-Personnel	**Prof. Services / Training**	**COIT**	**57,000**	**-**	**25,000**	**80,000**	**162,000**
Technology	**Snowflake Consumption**	**COIT**		**2,000**	**5,000**	**18,000**	**25,000**
Technology	**dbt licenses**	**COIT**	**-**	**-**	**13,000**	**-**	**13,000**
		Total CON Funded	154,761	201,587	274,351	312,896	943,595
		Total COIT Funded	**57,000**	**2,000**	**43,000**	**98,000**	**200,000**
		Total Project Cost	211,761	203,587	317,351	410,896	1,143,595

High Level Project Spending Plan: FY 2025 – FY 2029

Category	Description	Funding	FY2024-25	FY2025-26	FY2026-27	FY2027-28	FY2028-29
Personnel	Internal Staff	CON	169,787	943,595	1,251,582	1,276,614	1,302,146
Personnel	**Project staff**	**COIT**			**817,539***	**833,890***	
Non-Personnel	Prof. Services	CON	20,000				
Non-Personnel	**Prof. Services**	**COIT**		**162,000**	**220,000***	**60,000***	
Technology	Snowflake Consumption	CON					100,000
Technology	**Snowflake Consumption**	**COIT**		**25,000**	**80,000**	**100,000**	
Technology	dbt + PowerBI licenses	CON					52,849
Technology	**dbt + PowerBI licenses**	**COIT**		**13,000**	**49,650**	**50,333**	
		Total CON Funded	189,787	943,595	1,251,582	1,276,614	1,454,995
		Total Proposed COIT Funding		**200,000**	**1,167,189***	**1,044,222***	
		Total Project Cost	189,787	1,143,595	2,418,771	2,320,836	1,454,995

Since our January 2026 submission, CON has reduced our FY27 and FY28 requests by $718,892 and $171,566 respectively, focusing the ask on internal hires vs. consultants. This change reflects lessons learned through our proof of concept with DHR, DataSF, and DT Cloud teams

Project Schedule -- Completed

Completion Date	Name of Milestone Completed	Brief Description
06/30/2025	Oracle BI Code Freeze	Code freeze for all non-critical SF Reports & Analytics change requests to free up capacity and reduce rework
06/30/2025	Reports & Analytics Team Report Disposition	Completed internal disposition of which current reports/dashboards should be rebuilt
07/31/2025	Snowflake Architecture Sessions and Environment Build	Snowflake Architecture sessions and CON Snowflake Instance built (Accounts, roles, databases, schemas, key/pair, etc.)
09/30/2025	CCS Global Consultants	Initial Assessment, Project Planning, Estimation for Design/Build
09/30/2025	Initial Meetings with Central Agencies	Meeting with CON-AOSD, CON Payroll, CON BAD, DHR, CAO/OCA for feedback on what reports/dashboards should be rebuilt.
10/31/2025	Oracle Golden Gate Big Data Sync	DT Cloud/DBA Teams configured sync from PeopleSoft to Snowflake
12/31/2025	PeopleSoft Report Assessment	Identify which report/analytics within PeopleSoft would be a valid replacement for existing BI reports.
01/30/2026	DHR Proof of Concept – PS Raw Data	Performed two Proof of Concepts from PeopleSoft HCM with DHR: 1) HR Data for Active Positions Reports 2) HR Data for SF My Portal
02/28/2026	Expenses Raw Data Sync	Expenses Raw Snowflake Data sync

Project Schedule - Upcoming

Target Completion Date	Upcoming Deliverable / Milestone	Brief Description
03/31/2026	Expenses Business Process Stakeholder Sessions	Requirements sessions with various departments to re-design Expense Reporting (AIR, AOSD, DHR, DPW, PUC)
04/30/2026	Expenses Proof of Concept (POC)	Build transformation using dbt Labs, Data Model Design (Star Schema), Semantic Model (Power BI Dataset), and Expense Report Details Report in Power BI
5/31/2026	Revised Project Plan	Finalize prioritization and development schedule for remaining 40+ subject areas
07/31/2026	Chart of Accounts POC	Build transformation using dbt Labs, Data Model Design (Star Schema), Semantic Model (Power BI Dataset), and Visualizations in Power BI
08/31/2026	Payroll, Time & Labor POC	Build transformation using dbt Labs, Data Model Design (Star Schema), Semantic Model (Power BI Dataset), and Salary & Fringe report in Power BI

Assumptions, Constraints, and Risks

Budget and Performance Support:

The COIT Budget and Performance sub-committee can provide support to ensure project success by approving the requested funding for new Project Staff, Professional Services, Data Consumption and Licensing Cost through FY2028 when CON expects to terminate Oracle support and operationalize Snowflake, dbt, and PowerBI costs.

Project Assumptions:

Support and engagement from Central Agency partners (DT, Data SF, ADM, OCA, DHR).

Under the Data Domain Governance Model individuals from various department will need to serve on the Data Governance Body and individuals will need to fulfill roles as Data Stewards, Data Owners, and Data Custodians.

Constraints & Risks:

Both legacy OBIEE will need to be licensed, supported, and kept operational until all necessary reports are available in Snowflake & Power BI.

OBIEE is still supported, but only under Extended Support until December 2026.

Risk that internal resources will have to continue supporting OBIEE in addition to working on developing new Data Models/Reports on a technology that they may not have experience with.

Questions & Answers

Adjournment

Thank you!