

City and County of San Francisco
Committee on Information Technology

Budget and Performance Subcommittee

03/07/25

Agenda

- **Call to Order by Chair**
- **Roll Call**
- **General Public Comment**
- **Department Updates and Announcements**
- **Approval of Meeting Minutes from February 28, 2025
(Action Item)**
- **Department Presentations: GF Technology Project Proposals**
- **Adjournment**

Meeting Broadcast & Public Comment

- **Today's meeting will be broadcast live via WebEx. Link can be found on the COIT website at sf.gov/COIT**
- **Public commenters who are participating remotely can join the WebEx or call 415-655-0001 and use access code 2660 481 1812 and webinar password COIT (2648 from phones).**
- **To speak when public comment is open, dial *3 or use the WebEx raise hand feature.**

Item Number 3

General Public Comment

Discussion

Item Number 4

Department Updates and Announcements

Discussion

Item Number 5

Approval of Minutes from February 28, 2025

Action item

Item Number 6

Department Presentations

Discussion

Schedule

(10:05AM - 10:25AM) FAM - Surveillance Technology Project

(10:25AM - 10:45AM) POL – Public Safety Technology Ecosystem

(10:45 AM – 10:55 AM) TIS – VOIP LAN Modernization

(10:55AM – 11:15 AM) CON – AI Enabled Customer Service



City and County of San Francisco

Presentation to COIT Budget & Performance Subcommittee

Surveillance Technology Improvement Project (STIP)

Paul Peterson, Director of Information Technology

Project Overview

• Problem Statement

- The de Young and Legion of Honor museums rely on outdated analog surveillance systems that fail to meet modern security standards, leading to operational inefficiencies, higher maintenance costs, and increased security risks.

• Project Objective

- This project will replace obsolete surveillance technology with advanced digital systems, enhancing security monitoring, improving response capabilities, reducing labor strain, and ensuring long-term reliability.

Project 5-Year Financial Forecast

	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30
COIT Allocation	\$300,000	\$150,00	\$150,000		
Other Sources					
Total Project Funding	\$300,000	\$150,000	\$150,000		

Project Planning – de Young Museum

- **Completed Phases:**

- **Employee Entrance** – Completed (November 2023)
- **Textile Galleries** – Completed (November 2023)
- **Art Storage areas** – Completed (January 2025)

- **In Progress:**

- **Lower Level** – January – February 2025

- **Scoping:**








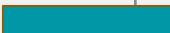
- Arts of the Americas
- Card Readers (replacement)

Project Planning – Legion of Honor Museum

- **Completed Phases:**
 - **iStar Controller Replacement (infrastructure)** – September 2024
 - **Roof exterior** – February 2025
- **In Progress:**
 - **Security Base Surveillance Monitors** – February 2025
- **Scoping:**
 - Basement Level







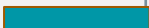
High-Level Project Plan de Young Museum

List key project activities in left-hand column, known dates of key milestones in second column, and adjust length/position of blue bars and diamonds to indicate time/duration for listed activities.

Quarter/FY	FY25	FY26	FY26	FY26	FY26	FY27	FY27	FY27	FY27	FY28	FY28
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
American Native Galleries - Cable installation											
American Native Galleries - Camera Installation											
Herbst Galleries											
Textile Gallery											
Lower level											
Cafe											
Roof exterior											
Main Level											

High-Level Project Plan Legion of Honor

List key project activities in left-hand column, known dates of key milestones in second column, and adjust length/position of blue bars and diamonds to indicate time/duration for listed activities.

Quarter/FY	FY25	FY26	FY26	FY27	FY28	FY28	FY28	FY28	FY29	FY29	FY29
	Q4	Q1			Q1	Q2	Q3	Q3	Q1	Q2	Q3
Basement level											
Basement level phase 2											
Lower level phase 1											
Lower level phase 2											
Lower level phase 3											
Upper level G1-10											
Upper level G12-19											

Measuring Project Success

- **Key Performance Indicator(s)**

- Reduction in security incidents due to enhanced surveillance capabilities
- Improved response times for security personnel
- **Ability to provide critical evidence** in cases where **police are called for crimes that occur on museum property**
- With **high-quality video evidence from the new surveillance system**, we can **streamline insurance claims processing**, ensuring accurate documentation and faster resolution.

Before



After



Risk Mitigation Strategies

Project Risk Management Plan

COIT considers a thoughtful list of potential risks and plan to address them to be a strength. For a helpful reference on types of project risk, see this [this resource](#).

Below, please discuss the risks this project might face. What could fail and why? How would you prepare for these risks? Some common risks are pre-populated below, but **feel free to change these** as appropriate for your project.

Potential Risk #1: Budget Overrun and/or Vendor Delays	<u>Early vendor engagement and procurement, building contingency plans for any kind of delays</u>
Potential Risk #2: Project Scope Creep (<i>project deliverables expand beyond original plan and exceed available resources</i>)	Documented Clear Criteria for Camera Replacement – Ensuring only cameras that meet predefined conditions are upgraded, avoiding unnecessary expansions. Completed a Needs Assessment – Identifying essential areas for enhancement, ensuring the project scope remains aligned with security priorities and available resources. Maintaining a Defined Scope – By basing decisions on pre-approved assessments , we prevent additional unplanned deliverables from inflating project costs or timelines. All risks are continuously evaluated and assessed throughout the project lifecycle.
Potential Risk #3: Staffing/Capacity for Implementation, Deployment, Training	Training & Change Management – We have integrated change management process and training programs to ensure security staff are well-prepared for the new system. Ongoing Communication & Evaluation – Regular communication channels have been established to track project status , address concerns, and ensure alignment with operational needs. Stakeholder Involvement – Security personnel have been involved in decision-making and implementation planning to facilitate smoother adoption and reduce resistance.

Project Risk Management Plan, Continued

Below, please answer two questions related to a scenario in which your project does not receive funding.






<u>Consequences of Not Funding</u>	Security staff will continue to rely on manual oversight and increased overtime to compensate for failing equipment, leading to higher labor costs and staff burnout. Reactive Maintenance: Frequent breakdowns of obsolete systems will result in more emergency repairs, further driving up costs and consuming resources. Higher Support Costs: Maintaining and repairing outdated technology becomes increasingly expensive as parts become harder to source and vendor support diminishes.
<u>Alternate Plans</u>	There are no viable alternatives to this project. The current surveillance systems will eventually become unsupportable , leading to increased security risks, higher maintenance costs, and potential system failures . Proceeding with the planned upgrades is essential to ensuring operational reliability, safety, and compliance .

Change Impact Assessment

Purpose: This template can help you determine the degree and complexity of change your project entails. It also brings focus to who and what is impacted, which can sharpen your plans for communication and training.

Impact Analysis	
Dimension of Change	Description of the change
Operational Impact	Improved security operations with automated monitoring. Enhancements to security policies aligning with modern surveillance technology. Impact on Teams: Reduced manual workload for security staff, allowing better focus on high-priority tasks. Ensures a safer environment for museum visitors and staff.
Policy & Management Impact	No changes to the cybersecurity or surveillance policy are required for this project's implementation. However, Museum Security management will need to update operations and procedures to fully leverage the capabilities of the new surveillance systems and cameras. These updates will focus on enhancing monitoring workflows, optimizing response protocols, and training personnel on new system functionalities .
Impact to Specific Roles/Teams, Departments, Residents	<p>This project will significantly improve the morale of the museum security team by enhancing their ability to perform their duties effectively. Currently, they are working with 20+ year-old technology, which does not meet modern security standards or provide the equitable resources available at other institutions.</p> <p>The implementation of new surveillance systems will:</p> <ul style="list-style-type: none">✔ Increase efficiency – Reducing manual work and improving monitoring capabilities.✔ Enhance response times – Providing clearer footage and better situational awareness.✔ Boost job satisfaction – Ensuring security personnel have access to the tools needed for effective operations. <p>While there may be a short learning curve in mastering the new technology, training and change management have been integrated into the project to facilitate a smooth transition. Overall, the benefits far outweigh any initial adjustment challenges.</p>

What will the funds be used for?

- The funds will be used for the **installation and implementation** of upgraded surveillance technology, including:
-  **Installing cameras** through **approved city security integrators** to enhance monitoring capabilities.
-  **Infrastructure upgrades**, including **cabling and wiring** to support the new system.
-  **Software licensing** for video management and analytics.
-  **Storage solutions** to retain and manage video footage securely.
-  **Monitors and display systems** for real-time security monitoring and review.
- These upgrades are critical for improving **museum security, operational efficiency, and compliance with modern surveillance standards.**

Questions?



DEPARTMENT NAME

Presentation to COIT Budget & Performance Subcommittee

Law Enforcement Technology Ecosystem

Ecosystem

BWC = Body-Worn Camera
RMS = Records Management System
DEMS = Digital Evidence Management System
RTCC = Real-time Crime Center

Presented by
POL: Jim Shields, Director
Friday, March 7, 2025

Project Overview

- **Project Objective**

- Purchase and implement an ecosystem that tightly integrates the 4 Pillars of law enforcement technology: BWC, RMS, DEMS, RTCC and will be able to leverage Artificial Intelligence (AI) to maximize efficiency.

Project Overview

- **Problem(s) you are trying to solve**

- **Enhancing Crime Pattern Identification** : Ability to analyze large datasets to better understand crime trends and connections through AI rather than human analysts.
- **Data- Informed Resource Deployment** : Using a system that provides insights to strategically allocate law enforcement resources to areas and times where they are most needed
- **Accelerating Investigations** : AI automates tasks like video analysis and data extraction, speeding up investigations and reducing backlogs.

Project Overview

- **Problem(s) you are trying to solve (continued)**
 - **Improving Situational Awareness** : Real- time crime mapping and data visualization provide officers with a comprehensive understanding of ongoing situations.
 - **Increasing Efficiencies** : Automating analytical tasks to free up officers to focus on other critical duties.
 - **More Effective Crime Prevention** : Automating analytical tasks frees up officers to focus on other critical duties.

Project Overview

- **Problem(s) you are trying to solve (continued)**
 - **Enhancing Public Safety** : More efficient and effective policing contributes to a safer community.
 - **More Precise Lead Generation** : The ability to scan large amounts of data, will provide more precise leads to investigators.
 - **Increasing Investigative Ground Coverage** : Automating many data analysis tasks allows investigators to cover more ground and look at more cases than previously possible.

Project Overview

- **Problem(s) you are trying to solve (continued)**
 - **Legal and Regulatory** : Compliance with Federal regulations is essential. Privacy concerns must be addressed, and policies should be in place to ensure responsible data collection and use.
 - **Community Acceptance**: Public engagement and transparency are crucial for building trust and addressing concerns about bias, privacy and surveillance.

Project Overview

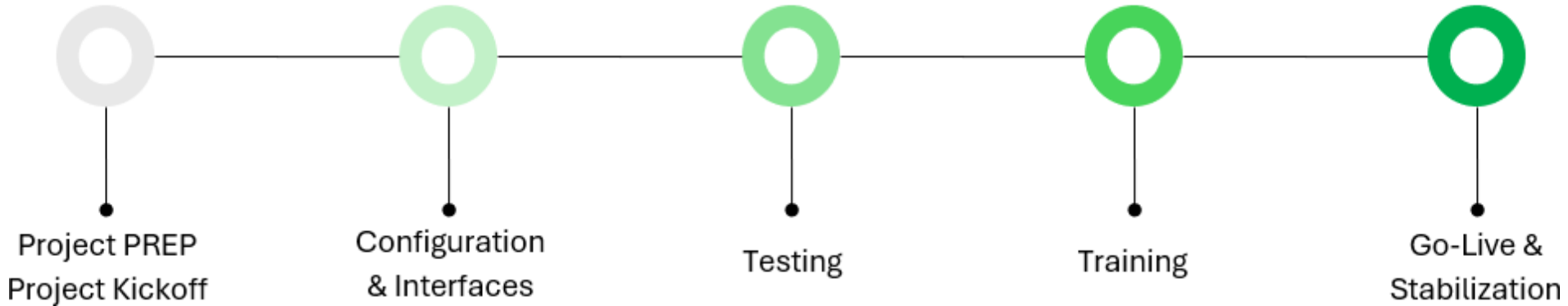
- **Challenges faced by users, staff, stakeholders**
 - Compliance with Federal regulations which is essential.
 - Public engagement and transparency – these are crucial for building trust and addressing concerns about bias, privacy and surveillance.
 - Privacy concerns must be addressed, and policies should be in place to ensure responsible data collection and use.

Project 5-Year Financial Forecast

	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30
COIT Allocation	\$2,186,027				
Other Sources	\$7,343,973				
Total Project Funding	\$9,530,000				

High-Level Project Plan

Implementation



Measuring Project Success

- **Key Performance Indicator(s)**

- Reduction in crime rates.
- Improved response times.
- Increase in % of solved cases.
- Reduction in time to clear cases.
- Reduction in time taken to analyze evidence.
- Efficient deployment of personnel and reduction of administrative burden.

Project Risk Management Plan

Potential Risk #1: Budget Overrun and/or Vendor Delays	During Project PREP and before the Kickoff Meeting, the process of tracking costs and tracking schedule will be firmly established and subject to weekly reviews to ensure costs and slippage are contained.
Potential Risk #2: Project Scope Creep <i>project deliverables expand beyond original plan and exceed available resources)</i>	Establishment of a "Governance Body" to ensure both technical and business decision proposed changes do not compromise the ability to meet overall schedule and cost.
Potential Risk #3: Staffing/Capacity for Implementation, Deployment, Training	During contract negotiations with the vendor, the shared responsibility for implementation, deployment, and training will be detailed and used for continual monitoring during the life of the Project.

Project Risk Management Plan (continued)

Below, please answer two questions related to a scenario in which your project does not receive funding.

<u>Consequences of Not Funding</u>	Continual delay of using the right technology to lessen the sworn member's administrative burden that is currently required to meet the needs of 21 st century policing.
<u>Alternate Plans</u>	<p>There are no viable cost-free alternatives.</p> <p>Any alternate plan involving cost would require further delay to gain approval. This could involve multiple yearly cycles to reach approval where the alternative plan is a compromise of what is needed: A Law Enforcement Technology Ecosystem.</p>

Change Impact Assessment

Impact Analysis	
Dimension of Change	Description of the change
Operational Impact	Significant operational changes will be mitigated through training before, during, and after implementation.
Policy & Management Impact	Review of Department Notices and DGOs (Department General Orders) on business and operational changes resulting from the new technology and use of AI.
Impact to Specific Roles/Teams, Departments, Residents	<p>Departments affected will be identified for direct involvement in the cycles of planning, testing, training, and Go-Live.</p> <p><u>Residents</u>: Allow the public to provide digital evidence quickly and efficiently to investigators and the DA. Ensures that a defendant's constitutional rights are upheld by implementing a safe, secure, and reliable platform for sharing evidence from the criminal justice agencies to the defense.</p>

COIT Request Breakdown

SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL	Comments/Description
COIT Allocation	\$2,186,027						
Non-COIT Funding	\$ 7,343,973						
USES							
Salaries Positions							
Mandatory Fringe Benefits							
Total Labor							
Deployment Services							
Other Professional Services	\$2,030,000						
Software Licensing Costs	\$7,500,000						
Services Of Other Depts							
Total	\$9,530,000						



Questions?



DEPARTMENT OF TECHNOLOGY

Presentation to COIT Budget & Performance Subcommittee

City Telecom & LAN Modernization

March 7, 2025

Project Overview

- **Problem Statement**

- Legacy telephony systems no longer meet the communication needs of today's dynamic business environment. These outdated systems lack support, incur high maintenance costs, and fail to provide essential capabilities such as mobility, scalability, disaster recovery, and centralized monitoring—all critical for seamless collaboration and modern office environments.

- **Project Objective**

- Complete the transition from outdated, high-maintenance telephony systems to modern, cost-effective communication solutions. This includes VoIP, Soft Phones (WebEx and MS Teams VoIP), and enhanced contact center capabilities to improve mobility, disaster recovery, scalability, collaboration, and system monitoring—reducing costs and ensuring long-term operational efficiency.

Project 5-Year Financial Forecast

	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30
COIT Allocation	\$1.2MM	\$1.3MM	\$1.2MM	\$0MM	\$0MM
Other Sources					
Total Project Funding	\$1.2MM	\$1.3MM	\$1.2MM	\$0MM	\$0MM

Milestones / Accomplishments

Overall Progress- 75% Completion

Enterprise City VoIP Tenants:

1. Rec Park – 12 sites
2. *Dept. of Technology – 2 sites
3. Central Shops – 2 sites
4. Child Support Services
5. Economic and Workforce Dev.
6. Arts and Grants for the Arts
7. DPW- 2 Sites
8. War Memorial
9. Environment
10. Dept. of Children, Youth & Families
11. Retirement
12. Health System Services
13. Law Library
14. Adult Probation – 2 sites
15. Transgender Initiatives
16. District Attorney
17. Medical Examiner
18. Children & Families Commission
19. *SHF

Continued:

20. Dept of Police Accountability
21. *Elections- 1 site
22. Homelessness
23. Digital Services
24. JUSTIS Staff
25. Library- 30 Sites
26. Animal Care
27. *SFPort (South Beach Harbor)
28. *Ambulance Dispatch Fire
29. *SFPD
30. Sheriff Dept. of Accountability
31. *TTX
32. *ASR
33. Public Defender
34. MOHCD
35. OEWD
36. OCII
37. *DHR

49 SVN Campus:

38. Permit Center (ADM)
39. DBI
40. CPC
41. DPW
42. PUC
43. Rec Park
44. Planning
45. BOA
46. DPH Environmental Health
47. Fire
48. Entertainment Commission
49. Cannabis
50. Short-term Rentals

25 Van Ness

Campus:

51. Ethics
52. HSA
53. Status of Women
54. HRC
55. Risk Mgt
56. RED
57. GSA
58. RNT
59. CSC
60. SHF

Other VoIP Tenants:

61. DPH Zuckerberg

Depts. Excluded: HSA, PUC, MTA, SFO

Depts. Remaining:
City Hall, CAT, DEM, JUV, FIR, HOJ

*Note: some of these deployments involve "partial" sites, and remaining sites will follow.

Milestones / Accomplishments FY24-25

1. SHF VoIP Migration (2 sites off PBX, 2 targeted by November 2025).
2. SFPD Central Station off PBX.
3. 1SVN MOHCD, OEWD, DHR and OCII: LAN remediated, and staff migrated off PBX.
4. 1155 Market off legacy PBX.
5. City Hall LAN remediated. Telephony migration discussions underway.
6. Fox Plaza LAN remediated. Telephony migration discussions underway.
7. FIR LAN remediation underway (grant funded).
8. Microsoft Teams rollout to users across 10+ depts. (E.g., CON, ADM, TTX)
9. 5 additional POCs in progress for Teams Calling.

High-Level Project Plan

Migrations	Dates of Key Milestones	FY25	FY25	FY26	FY26	FY26	FY26	FY27	FY27	FY27	FY27	FY28	FY29
		Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
SHF Jails	6/25, 11/25	<div></div>											
SFPort	TBD	<div></div>											
City Hall	TBD		<div></div>										
CAT	TBD			<div></div>									
DEM	TBD				<div></div>								
FIR	TBD	<div></div>											
JUV	TBD							<div></div>					
HOJ	TBD							<div></div>					

Measuring Project Success

- **Key Performance Indicator(s)**

- # PBX Sites

- Reduced PBX sites from over 100 to 21, decreasing the risk of telephony failure by 75% (excluding PUC, AIR, HSA, MTA and 311).

Risk Mitigation Strategies

Project Risk Management Plan




<p><u>Potential Risk #1:</u></p> <p>Resource constraints within the telecom team due to upcoming attrition, competing priorities, including time-sensitive real estate moves, consolidation projects, and ongoing operational work.</p>	<p><u>Your Plan to Prepare for/Mitigate this Risk</u></p> <ul style="list-style-type: none">• Decouple the telephony migrations from the PBX decommissioning to focus on mitigating the risk.• Adjust the project schedule to account for resource impacts resulting from real estate moves and consolidation projects.• Proceed with hiring plans if approval is granted.
<p><u>Potential Risk #2:</u></p> <p>Delays in customer readiness, including the time required to gather and confirm requirements.</p>	<p><u>Your Plan to Prepare for/Mitigate this Risk</u></p> <ul style="list-style-type: none">• Conduct a kickoff meeting with the client department to clarify the required information and expectations for the telephony migration process.

Project Risk Management Plan, Continued

<u>Consequences of Not Funding</u>	The City would be running critical business functions on outdated hardware and software with limited support.
<u>Alternate Plans</u>	Highly increased maintenance expenditures and the need for expanded spare parts inventory to support legacy telephony systems.

Project Financials

Total Project Cost	Total COIT Funding To Date	Total Other GF Funding	Total NGF Funding	Total NGF + GF Funding	Total Spent	Remaining Balance
\$16MM	\$12MM	-	-	-	\$10.9MM	\$1.1MM

	Status	Comment		
Schedule		Begin Date	July 2017	
		End Date	June 2028	
		% Complete	75%	
Scope		Scope per FY detailed in earlier slide.		
Budget		Plan to carryforward \$675K in remaining funds to FY25-26.		

COIT Request Breakdown

SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL	Comments/Description
COIT Allocation	\$1.2MM	\$1.3MM	\$1.2MM	\$0MM	\$0MM		
Non-COIT Funding							
USES							
3 Contractors	\$651,040	\$460,000	\$360,000				
3 1093's	\$840,000	\$840,000	\$840,000				
3 Prop F's	\$300,000						
LAN Small Parts	\$83,960						
Software Licensing Costs							
FY24-25 Carryforward	(\$675,000)						
Total	\$1.2MM	\$1.3MM	\$1.2MM				

Project Benefits and Impact

- **Increased Resiliency:**
 - Reduces risk of equipment failures that would disrupt business operations
 - Delivers high availability for Disaster Recovery
- **Enablement for mobility, shared office spaces, increased collaboration**
- **Prerequisite for VoIP:**
 - Provides Power Over Ethernet (POE) support for VoIP and upgraded Wi-Fi
- **Telephony for New Sites:**
 - Central telephony system to bring on new sites
- **Enhanced Security:**
 - Increased security visibility
 - Segmentation of users, devices and applications at a departmental level
- **Future proofing and scalability:**
 - Increases network capacity

Questions?



DEPARTMENT NAME

Presentation to COIT Budget & Performance Subcommittee

AI Enabled Customer Service

Problem Statements

Inconsistent Customer Experience: The decentralized structure of the City and county's support ecosystem — with nearly 10 central agencies and over 55 department support teams providing customer service independently — results in fragmented and inconsistent experiences. Customers often have to contact multiple teams for a complete answer, leading to confusion, delays, and frustration.

Operational Inefficiencies and Duplication of Effort: Siloed customer service operations across various agencies lead to duplicated efforts, repetitive processes, and misaligned support strategies. This lack of coordination reduces operational efficiency, delays query resolution, and limits the capacity of human agents to focus on high-value interactions.

Limited Data-Driven Decision-Making: The absence of a centralized AI-powered analytics platform prevents agencies from sharing data and insights, making it difficult to identify cross-agency service trends, predict customer needs holistically, and drive coordinated, proactive improvements.

Technology Silos and Integration Challenges: Decentralized service platforms create technology silos, complicating the seamless integration of AI solutions. The lack of interoperability across agencies hinders efficient workflows and increases the risk of service disruptions during technology upgrades.

Scalability Constraints: With customer service spread across multiple uncoordinated agencies, scaling support operations to meet growing demand is inefficient. The current structure struggles to adapt to emerging technologies, evolving customer needs, and fluctuating workloads in a cohesive manner.













Employee Workload and Productivity Barriers: Decentralized service teams lack unified AI tools to streamline their work, adding to staff workloads and creating unnecessary redundancies. This disjointed approach reduces employee productivity, increases stress, and ultimately impacts both service quality and job satisfaction.



Project Objective

To revolutionize customer service operations by leveraging cutting-edge AI technologies to **enhance customer experiences, streamline support processes, and drive operational efficiency** across the City's decentralized support ecosystem. This transformation aims to foster collaboration among agencies, eliminate duplicative efforts, and create a **unified, data-driven approach to customer service**.

Customer Persona to Business Partner Mapping

	Application	Business Process	Personas / Population	DHR	AOSD	Payroll	HSS	CAO	BAD	TTX
"Casual" Users	 SF EMPLOYEE PORTAL	HR	All Employees (34k), Retirees (38k), POIs (12k), USD (6k), CCD (4k)	✓						
	 SF EMPLOYEE PORTAL	Benefits	All Employees (34k), Retirees (38k), USD (6k), CCD (4k)	✓		✓	✓			
	 SF EMPLOYEE PORTAL	Payroll, Time, Absence	All Employees (34k)	✓	✓	✓	✓			
	 SF EMPLOYEE PORTAL	Expenses	All Employees (34k)	✓	✓	✓				
	 SF LEARNING	Learning	All Employees (34k), POIs (12k)	✓	✓	✓	✓	✓	✓	✓
	 SF CITY PARTNER	Procure to Pay	Bidders, Suppliers (10k)		✓			✓		✓
"Power" Users	 SF PROCUREMENT	Procurement	Contracting & Purchasing (4k)		✓			✓		✓
	 SF FINANCIALS	Financials	Finance & Accounting (4k)		✓			✓	✓	✓
	 SF PEOPLE & PAY	Hire to Retire	HR, Benefits, Payroll Teams (2k)	✓		✓	✓			
	 SF BUDGET	Budget	Budget (<1k)						✓	
	 SF LEARNING	Learning	Learning Admin & Instructional Design (<100)	✓						
	 SF REPORTS & ANALYTICS	Reporting	Analysis (8k)	✓	✓	✓	✓	✓	✓	✓

Key Outcomes – What's different in 5 years?

- ◆ **Enhanced Customer Experience:** Implement AI-driven solutions — such as chatbots, virtual assistants, and sentiment analysis tools — to provide 24/7 personalized and efficient support tailored to individual customer needs. Ensure these solutions work seamlessly across agencies to offer consistent and comprehensive responses, reducing the need for customers to contact multiple departments.
- ◆ **Operational Efficiency and Collaboration:** Automate routine and repetitive tasks while fostering cross-agency coordination. Enable faster query resolution, reduce response times, and free human agents to focus on complex and high-value customer interactions by breaking down silos and streamlining shared processes.
- ◆ **Data-Driven Insights:** Utilize AI analytics to gather actionable insights from customer interactions across all agencies. Facilitate data sharing and trend analysis to identify service gaps, predict customer needs proactively, and drive coordinated, informed decision-making.
- ◆ **Seamless Integration:** Ensure smooth integration of AI solutions with existing customer service platforms across agencies. Prioritize interoperability and centralized workflows to maintain continuity, avoid disruptions, and enhance service delivery.
- ◆ **Scalability and Adaptability:** Develop a scalable AI framework that adapts not only to evolving customer needs and emerging technologies but also to the complex, decentralized structure of the City's support ecosystem. Ensure AI solutions can flexibly expand and support increased service demand across all departments.
- ◆ **Improved Employee Productivity and Support:** Equip customer service teams across agencies with AI tools that enhance productivity, provide real-time assistance during interactions, and reduce workload-related stress. Foster collaboration by unifying support systems, ensuring staff have the resources and shared knowledge needed to deliver exceptional service

Project Objective

To revolutionize customer service operations by leveraging cutting-edge AI technologies to **enhance customer experiences, streamline support processes, and drive operational efficiency** across the City's decentralized support ecosystem. This transformation aims to foster collaboration among agencies, eliminate duplicative efforts, and create a **unified, data-driven approach to customer service**.

The ultimate goal is to create a customer service model that is **proactive, responsive, and adaptive** — transforming a fragmented support landscape into a seamless, collaborative ecosystem that sets a new benchmark for service excellence while driving measurable business outcomes.

While this project DOES intend to address operational inefficiencies and improve productivity, **this project does NOT aim to reduce headcount**, nor reduce the importance of a people-first customer service organization. The goal of reducing time spent on manual, repetitive tasks is to increase capacity for more value-added analyses and personalized customer service, improving both the employee and customer experience.



Project 5-Year Financial Forecast

	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30
COIT Allocation	\$890,000	\$490,000			
Other Sources (CON)	\$254,169	\$264,311	\$252,000	\$264,600	\$277,830
Total Project Funding	\$1,144,169	\$754,311	\$252,000	\$264,600	\$277,830

COIT Request Breakdown



SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL	Comments/Description
COIT Allocation	890,000	490,000				1,380,000	
Non-COIT Funding (CON)	254,169	264,311	252,000	264,600	277,830	1,058,741	
USES							
Salaries Positions							
Mandatory Fringe Benefits							
Total Labor	254,169	264,311				518,480	• 1054 Salary + Fringe for budgeting, but primarily effort led by 1052 Data Analyst with coaching and feedback from more senior leaders
Deployment Services							
Other Professional Services	650,000	250,000				900,000	• Service Delivery Assessment • Digital Assistant Implementation
Software Licensing Costs	240,000	240,000				480,000	• Digital Adoption Platform (SaaS) • Digital Assistant (SaaS)
Software Licensing Costs			252,000	264,600	277,830	794,430	• Operationalize SaaS licenses after Year 2
Services Of Other Depts							
Total	1,144,169	754,311	252,000	264,600	277,830	2,692,910	

Measuring Project Success

Customer Satisfaction (CSAT) Scores: Measure improvements in customer satisfaction through post-interaction surveys and feedback.

First Contact Resolution (FCR) Rate: Track the percentage of customer inquiries resolved without the need for follow-ups or referrals to other departments.

Response and Resolution Times: Monitor the average time taken to respond to and resolve customer queries, aiming for faster, AI-assisted support.

Cross-Agency Collaboration Metrics: Evaluate the frequency and effectiveness of inter-departmental collaboration, such as joint case resolutions and shared data usage.

AI Utilization Rates: Measure how often AI tools (chatbots, virtual assistants, analytics) are used by both customers and support teams.

Employee Productivity Metrics: Assess improvements in agent efficiency, such as the number of cases handled per agent and reductions in manual, repetitive tasks.

Scalability Readiness: Track system performance during peak service demands, measuring AI tool responsiveness and support capacity.

Data-Driven Insights Adoption: Monitor how frequently AI-generated insights influence policy decisions, service enhancements, and resource allocation.

Project Planning: Clearly Assess & Quantify Problems & Opportunities before investing in solutions



A **Service Delivery Assessment** can help a customer service organization identify opportunities to leverage artificial intelligence (AI) by providing a **structured framework for evaluating processes, identifying pain points, and pinpointing areas where AI can enhance efficiency, effectiveness, and customer satisfaction**. Here's how:

Objective	Assessment	AI Application
Process Analysis and Automation Opportunities	Analyze repetitive, time-consuming tasks like data entry, ticket routing, or basic customer queries	These tasks can be automated using AI-powered tools like chatbots, virtual assistants, or robotic process automation (RPA) , reducing workload and improving response times
Customer Interaction Insights	Review customer interactions, including complaint resolution times, call durations, and service quality	AI-driven sentiment analysis tools can be deployed to analyze customer feedback and emotions in real time , helping tailor responses and predict issues before escalation
Data Utilization and Personalization	Identifies gaps in how customer data is collected, analyzed, and used for decision-making	AI algorithms can analyze large volumes of customer data to provide personalized recommendations, predictive insights, and proactive support.
Performance Metrics and Predictive Analytics	Highlights inefficiencies in tracking service metrics such as resolution rates, customer satisfaction scores, and agent performance	Predictive analytics and AI-powered dashboards can forecast trends, identify potential bottlenecks, and improve decision-making based on historical data.
Customer Self-Service Options	Reveal areas where customers face delays or challenges in resolving issues independently	AI can power self-service portals, interactive FAQs, or knowledge bases with natural language processing (NLP), enabling customers to resolve issues faster without human intervention
Scalability and Resource Optimization	Identify periods of high demand or resource constraints affecting service quality	AI can dynamically allocate resources (e.g., staffing predictions, load balancing across teams) or scale customer support through multilingual chatbots and automated systems
Training and Support for Agents	Reveal training gaps or challenges faced by agents in delivering consistent service	AI can provide tailored training modules, real-time agent assistance during calls (e.g., suggesting responses), and performance feedback based on AI-driven monitoring.
Enhanced Customer Feedback Systems	Identifies how feedback is collected and acted upon	AI tools can aggregate and analyze feedback from multiple channels, identify recurring themes, and recommend actionable improvements to enhance service delivery

Risk Mitigation Strategies

Project Risk Management Plan

Potential Risks	Mitigation Plan
1. Budget Overruns	<ul style="list-style-type: none">• Implement strict budget tracking processes with regular financial reviews.• Define clear cost estimates for AI tools, integrations, training, and consulting ensuring supplier contracts have transparent pricing models, clear deliverables and acceptance criteria.
2. Scope Creep	<ul style="list-style-type: none">• Develop a detailed project scope document, agreed upon by all stakeholders.• Set up a formal change request process to evaluate and approve any scope changes.• Conduct regular scope reviews to ensure alignment with project objectives.
3. Staffing Capacity	<ul style="list-style-type: none">• Conduct a staffing assessment early in the project to identify resource gaps.• Provide AI and technology training for existing staff to build internal expertise.• Strategically leverage experienced third-party consultants for up front assessment and analyses.

Project Risk Management Plan

Potential Risks	Mitigation Plan
4. Resistance to Change	<p>Risk: Staff may resist AI adoption due to fear of job displacement or unfamiliarity with technology.</p> <p>Mitigation: Implement a clear communication plan emphasizing AI's role in enhancing—not replacing—human work. Provide hands-on training and highlight success stories to build buy-in.</p>
5. Data Privacy and Security	<p>Risk: AI systems handling customer data may pose privacy and security risks if not properly safeguarded.</p> <p>Mitigation: Ensure AI solutions comply with all relevant data protection laws. Conduct regular security audits and implement strong encryption and access controls.</p>
6. Technology Integration Challenges	<p>Risk: AI tools may face compatibility issues with existing ERP and customer service platforms, causing disruptions.</p> <p>Mitigation: Conduct thorough testing in a sandbox environment before full implementation. Collaborate closely with City Systems & Technology teams and vendors to address integration roadblocks early.</p>

Project Risk Management Plan

Potential Risks	Mitigation Plan
7. Inconsistent Cross-Agency Collaboration:	Risk: The decentralized structure might hinder AI's effectiveness if agencies don't collaborate or share data. Mitigation: Establish cross-agency AI governance committees. Create shared data protocols and standardized workflows to facilitate coordination.
8. Unrealistic Expectations:	Risk: Stakeholders may expect instant results from AI adoption, leading to disappointment. Mitigation: Set clear, phased implementation timelines. Define what "success" looks like at each stage, aligning expectations with realistic AI maturity curves.
9. AI Bias and Accuracy	Risk: AI models may inadvertently perpetuate biases or produce inaccurate responses. Mitigation: Use diverse datasets for model training. Regularly audit AI outputs for fairness and accuracy, making adjustments as needed.

Project Risk Management Plan, Continued

Below, please answer two questions related to a scenario in which your project does not receive funding.

<u>Consequences of Not Funding</u>	<ul style="list-style-type: none">• Failing to pursue an AI-enabled customer service transformation could result in continued inefficiencies in handling routine customer inquiries, leading to longer response times and decreased satisfaction among our customers (employees and suppliers).• Human agents would remain overburdened with repetitive tasks, limiting their ability to address complex or high-priority issues effectively.• Additionally, the city would miss out on valuable insights derived from AI analytics, hindering its ability to make data-driven improvements to services.• Over time, these shortcomings could erode public trust, increase operational costs, and leave the city struggling to meet the growing demand for accessible and responsive services.
<u>Alternate Plans</u>	<ul style="list-style-type: none">• Regardless of COIT funding, the Controller's Office has begun and will continue to collaborate and align support services with our central agency partners in the Department of Human Resources, City Administrator's Office, and Department of Technology.

Change Impact Assessment

Purpose: This template can help you determine the degree and complexity of change your project entails. It also brings focus to who and what is impacted, which can sharpen your plans for communication and training.

Impact Analysis	
Dimension of Change	Description of the change
Operational Impact	<ul style="list-style-type: none"> As stated in the Project Objectives, a primary goal of this project is improve operational efficiency, cross-department collaboration, and employee productivity. These improvements may significantly impact current support teams, ideally reducing time spent on manual, repetitive tasks and increasing capacity for more value-added analyses.
Policy & Management Impact	<ul style="list-style-type: none"> We will collaborate with the City's CISO and CDO to ensure any new AI technology meets the City's surveillance technology and cybersecurity requirements. As we collaborate with our partner central agencies and departments to standardize and streamline support processes, we expect to evaluate changes to org. charts to reflect shifting responsibilities and the impact of AI enabled support. As noted throughout, this project does NOT aim to reduce headcount, nor reduce the importance of a people-first customer service organization.
Impact to Specific Roles/Teams, Departments, Residents	<ul style="list-style-type: none"> As noted in the Risk Mitigation Plan, by focusing on AI solutions, efficiency, and accountability, we expect resistance based on the assumption that headcount reduction is a goal. As stated in the objectives and will be reiterated throughout the project, this project does NOT aim to reduce headcount, nor reduce the importance of a people-first customer service organization. To mitigate that risk, we plan to provide training, workshops, and clear communication with department leaders and staff g AI's role in enhancing—not replacing—human work.

Questions?

Adjournment