

City and County of San Francisco
Committee on Information Technology

Budget and Performance Subcommittee

03/14/25

Agenda

- **Call to Order by Chair**
- **Roll Call**
- **General Public Comment**
- **Department Updates and Announcements**
- **Approval of Meeting Minutes from March 7, 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 2664 288 6179 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 March 7, 2025

Action item

Item Number 6

Department Presentations

Discussion

Schedule

DEM (10:05 AM - 10:25 AM)

ASTRID

SHF (10:25 AM - 10:45 AM)

Records Management System

TIS (10:45 AM – 10:55 AM)

Citywide Centralized Data Warehouse

TIS (10:55 AM – 11:15 AM)

JUSTIS

CON (11:15 AM - 11:35 AM)

Financial Reporting Automation

BOS (11:35 AM – 11:55 AM)

New Legislative Management System

All Street Teams Integrated Dataset (ASTRID)



Department of Emergency Management

Street Teams – Data/Reporting Timeline

From clunky to smooth/er



2018

2019/20

2021/22

2023/24

2025

ASTRID v1

ASTRID v-Infinity

Informal Coordination

HSOC
HOT
Street Medicine

Informal Coordination

HSOC
HOT/ERT
SCRT
Street Medicine

Informal Coordination

HSOC
HOT/ERT
SCRT
SORT
POET
OCC
SWRT
Street Medicine

DEM/Coordination

MOI partnership
DEM/HSOC
DEM/HEART
SFFD/SCRT
SFFD/SORT
HSH/HOT/ERT
DPH/POET
DPH/OCC/SCRT Triage
DPH Street Medicine

DEM/Coordination

Neighborhood Teams

Planned outreach

(DEM, DPH, HSH)

Crisis Response

SFFD/CP

Enforcement

SFPD/DPW/Sheriff

• *Proprietary/department-specific reporting/dashboards*

*Launch: Integrated
and shared dataset*

*Advanced: Integrated,
validated, automated
dataset and reporting*

Singular Stories

STREET CRISIS RESPONSE TEAM (SCRT)

December 2024






Image 1: SCRT in the field.

The Street Crisis Response Team (SCRT) is initiated through calls from the public to San Francisco's 911 call center and provides rapid, trauma-informed care to people in acute behavioral health crisis or who have needs that may not require an ambulance or transport to an emergency department. SCRT provides linkages to shelter, drug and alcohol sobering centers, mental health clinics & residential programs, urgent care, care coordination and other needed support for people with complex health needs. SCRT operates city-wide, seven days a week, 24 hours a day.

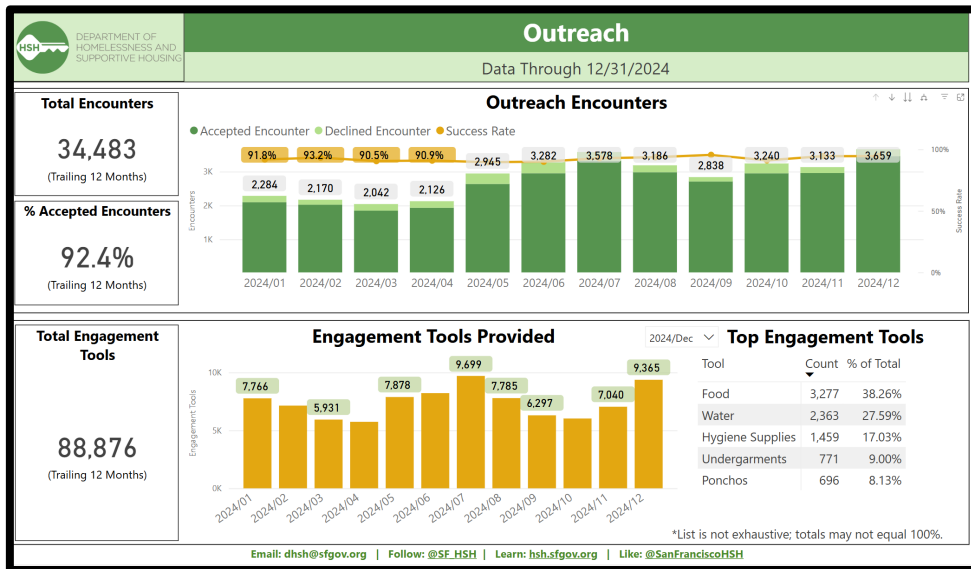
SCRT is a collaboration of the Department of Emergency Management (DEM), the San Francisco Fire Department (SFPD), the San Francisco Department of Public Health (DPH), and the Department of Homelessness and Supportive Housing (HSH). SCRT's mission is to provide an effective alternative response to individuals experiencing mental health crises or low-acuity medical needs while reducing unnecessary law enforcement responses and unnecessary emergency room utilization.

In March 2023, SCRT reconfigured its team composition to include one community paramedic, an EMT or second paramedic, and either a Peer Counselor or a Homeless Outreach Team (HOT) specialist. Behavioral health clinicians continue to be a core part of the SCRT and work under the expanded Office of Coordinated Care (OCC) providing follow-up and connection to behavioral health care for clients referred by SCRT units.

KEY PERFORMANCE INDICATORS

	Calls for SCRT Service The number of times SCRT was dispatched to the scene, which includes calls canceled enroute.	December 1,375	Cumulative ¹ 52,366
	SCRT On Scene² The number of times SCRT was on-scene for a client encounter.	December 1,189	Cumulative 41,810
	Client Engagements The number of times SCRT engaged with a person at the scene. A single client engagement may result in multiple outcomes.	December 958	Cumulative 29,361

- ¹ Cumulative metrics include data since launch November 30, 2020.
- ² "SCRT On Scene" is also called "Calls Handled by SCRT" in prior reports. In November 2023 Community Paramedics started sharing encounters in a new ePCR platform. This data fork may result in slight data discrepancies.



All Street Teams Integrated Dataset (ASTRID)

-At start of 2023, MOI began work to link data across four departments involved in street outreach (SFFD, DEM, DPH, and HSH) and their associated sub-teams. A pipeline for HSA benefits data is also being explored.

-Problem: City spends a great deal of resources helping unhoused individuals, yet street homelessness & overdoses remain a problem

-Data silos caused a lack of transparency, making it very hard to understand the problem and how to improve it

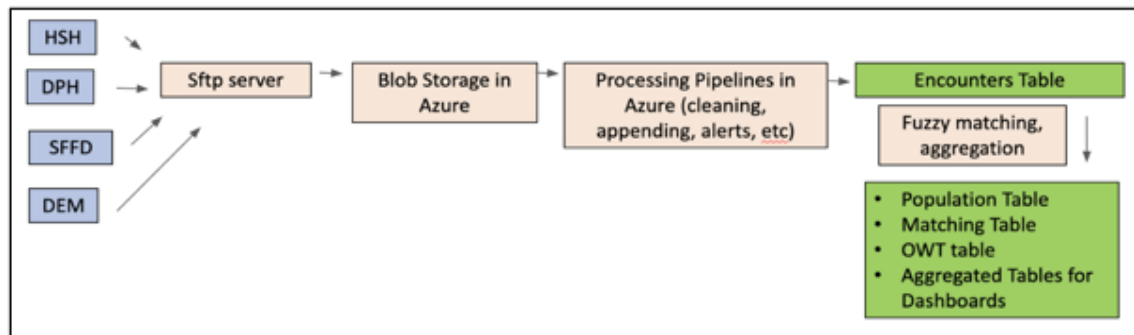
-Integrating data was necessary to:

- Understand what was happening with street outreach
- Improve care
- Empower outreach workers
- Develop system-level metrics
- Enable analytics, modeling, & AI approaches to improve outreach



ASTRID Databases

- Contains records of all street encounters with the 12 different teams from Jan 1, 2023-present
- Records from ~16,000 individuals
- Records from ~125,000 street encounters
- Also includes data from hospitalizations, legal holds, etc
- Updates weekly; would like to update daily

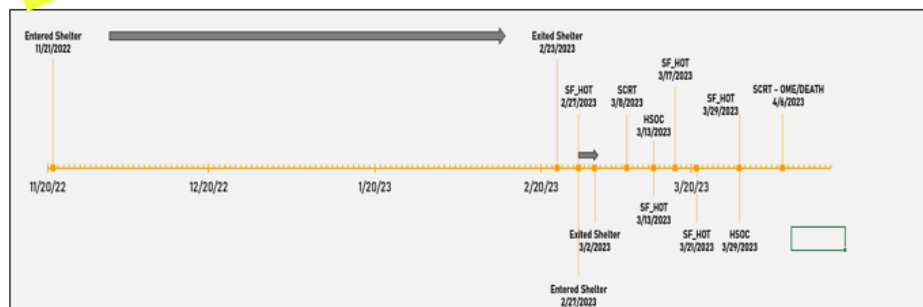
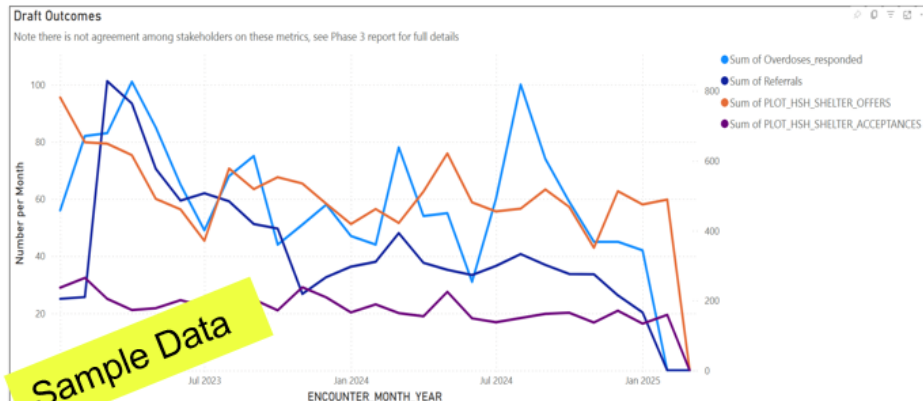


ASTRID Products (selected)

- Outreach Worker Tool
 - Individual, by-name client lookup
 - Enables better care by providing a more comprehensive history
 - In the field now with ~7 teams
- Policy Maker [Dashboard](#)
 - Aggregated counts and insights
 - For leadership/eventually for public
- Priority Clients Lists like SPL 3.0 and high utilizers
 - SPL 3.0 Acuity Matrix automation
 - 9% of clients are high utilizers, make up 50% of encounters
 - Provide visibility into who is using our system and how we can best help them

Outcomes:

- . This is a page under active development (as of Nov 4, 2024)
- . See dashboard design doc and Phase 3 report for more details on outcomes



PROGRESS TO DATE

While the future relies on engineering support, tremendous progress has already been made.

60% Completed



Data Sharing

Aligned around state MDT law – legal framework for sharing client/aggregated data.

ASTRID

V1 – ASTRID architecture is built. Data pipelines are successfully ingesting multiple teams' data.

Routine Uploads

All teams are aligned on the power of ASTRID. They are submitting weekly data.

Validation

Teams have taken initial steps to clean and validate data. Engineering support is needed.

ASTRID V2

Engineering support is needed to improve existing foundation & envision long-term, ASTRID technical roadman

ASTRID next steps

- Further data validation
- Integrate new data pipelines
- Simplify KPI and Outcomes road map
- Accelerate the outreach worker tool
- Public facing dashboard including KPIs
- **Huge potential** to leverage ML/AI to understand trends, inform strategies
 - 75% of people turn down offers of shelter
 - ML can help us learn more about compilation of services, which combinations yield best/worst results
 - Increase ROI, where/how to improve

Mayor's Office of Innovation
Integrated Street Teams Data

Client Look Up

Client First Name: John

Client Last Name: Doe

Client D.O.B: 2/14/1999

SEARCH

CLIENT INFO

Name: Jane Doe
Pronouns: She/Her
D.O.B: XX/XX/XXXX
Age: XX

Shared Priority List Client

POINT OF CONTACT
test updated XX/XX/XXXX
XXX-XXX-XXXX
Jane Doe, BEST Care Coordinator
XXX-XXX-XXXX
John Doe, OCC Case Manager

HOUSING INFO
test updated XX/XX/XXXX
Housing Status: Problem Solving

TOTAL OVERDOSES
6

TOTAL S150s
10

MOST RECENT OVERDOSES
test updated XX/XX/XXXX
XX/XX/XXXX
XX/XX/XXXX

MOST RECENT S150s
test updated XX/XX/XXXX
XX/XX/XXXX
XX/XX/XXXX

SHELTER HISTORY
test updated XX/XX/XXXX

MXM Health Center	XX/XX/XXXX
Health Right 360	XX/XX/XXXX
Health Right 360	XX/XX/XXXX

ER HISTORY
test updated XX/XX/XXXX

Hospital A	XX/XX/XXXX
Hospital B	XX/XX/XXXX
Hospital C	XX/XX/XXXX

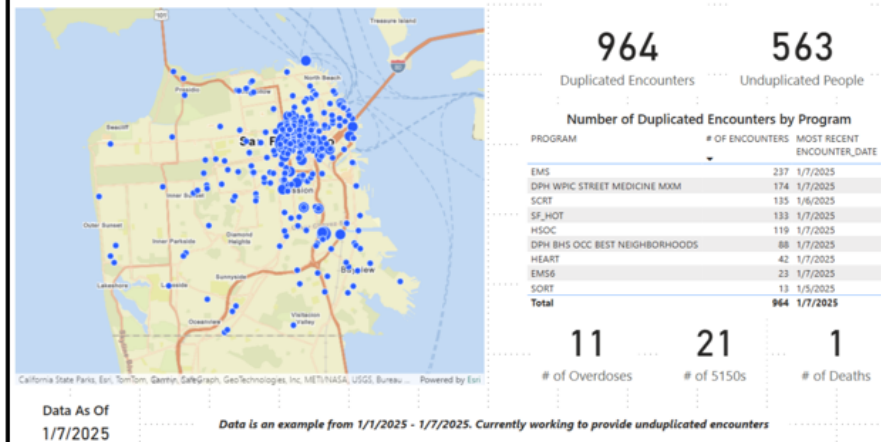
ENCOUNTER SUMMARY
test updated XX/XX/XXXX

SCRT	24 encounters
BEST	20 encounters
SORT	12 encounters
POET	10 encounters

ENCOUNTER HISTORY
test updated XX/XX/XXXX

Street Team	Location	Date
SCRT	Grove and Larkin st	XX/XX/XXXX
BEST	Overlook McDevitt	XX/XX/XXXX

ASTRID Street Encounters Dashboard (Previous 7 Days)



Sustainability: Project Needs

3

Positions

1. **Back-end engineer**
2. **Front-end engineer**
3. **Technical project manager**

Ideal - DEM/Data and Performance Team (ASTRID Team)

Title	Possible Reqs	FY25/26	FY 26/27	FY 27/28	Total
STAFFING					
TPM/Data Scientist	1054/5502	\$250,000.00	\$250,000.00	\$250,000.00	\$750,000.00
Back End Engineer	1043/1044	\$250,000.00	\$250,000.00	\$250,000.00	\$750,000.00
Front End Engineer	1042	\$250,000.00	\$250,000.00	\$250,000.00	\$750,000.00
RESOURCES					
Azure/Snowflake (~)		\$20,000.00	\$20,000.00	\$20,000.00	\$60,000.00
TOTAL		\$770,000.00	\$770,000.00	\$770,000.00	\$2,310,000.00

High-level project plan

Quarter/FY	Dates of Key Milestones	FY25	FY25	FY26	FY26	FY26	FY26	FY27	FY27
		Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Transition from MOI to DEM	1/25 – 4/25								
DEM Strategy and Resources Development	1/25 – 7/25								
POC to Production (Database)	7/25 – 12/25								
POC to Production (Outreach Worker Tool)	7/25 - 12/25								
Metrics, Outcomes, Reporting	3/25 -11/25								
Policy/Public Dashboard	1/26 - 6/26								
Program Evaluation, Predictive Analytics	3/26 – 6/26								

Project Risk Management Plan

<u>Potential Risk #1:</u> Failure to Update & Maintain Database	The back end of the database is the foundation. It's health and long-term sustainability is the fulcrum that everything else relies on. We must have engineering support for the database or it fails.
<u>Potential Risk #2:</u> Lack of Technical Expertise and Situational Awareness	In a multi-department, multi-team, integrated dataset, social and technical capital is needed for the project to be successful. It is key for the positions to be embedded in DEM, the department charged by the mayor's office to improve data coordination, which works hand and hand with partners on technical, operational and policy aspects of the work. We'd seek technical expertise in the hire and surround the person with subject matter expertise.
<u>Potential Risk #3:</u> Data as a Moving Target	As we move from POC to Production, ensure the database and outreach worker tool are flexible to support changes without breaking the architecture.
<u>Potential Risk #4:</u> <u>Lack of Sustained Buy-In</u>	Continued development to provide value add for those in the field, policy makers, and the public.



San Francisco Sheriff's Office

Presentation to COIT Budget & Performance Subcommittee

Public Safety -Records Management System

**Implement a Records Management System to improve public
safety records management and regulatory compliance**

3.14.2025

Executive Sponsor: Sheriff Paul Miyamoto

Captain Alejandro Cabebe

Martin Okumu - Chief Information Officer

Project Overview

- **Problem Statement**

- For many years, SFSO has been plagued with an inadequate and inefficient record-keeping system.
- The absence of an automated Records Management System hinders efforts to maintain compliance with regulatory standards, improve efficiency and provide transparent services.

- **Project Objective**

- Overhaul and modernize the current record keeping by implementing an automated and comprehensive Records Management System.

Project 5-Year Financial Forecast

	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30
COIT Allocation	\$2,493,706	\$2,493,706			
Other Sources					
Total Project Funding	\$2,493,706	\$2,493,706			

- **Project Performance: We plan to adjust limited positions from 4 to 2 in FY27**

COIT Request Breakdown

SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL	Comments/Description
COIT Allocation	2,493,706	2,493,706					
Non-COIT Funding	0	0					
USES							
Salaries	\$ 746,478	\$ 746,478				\$1,492,956	Temp COIT Positions
Mandatory Fringe Benefits	\$ 247,228	\$ 247,228				\$ 494,456	SALBE
Total Labor	\$ 993,706	\$ 993,706					Limited Staffing (4)
Implementation	\$ 1,000,000	\$ 1,000,000	\$0.00	\$0.00	\$0.00	\$2,000,000	Platform Data, Integration, Automation
Software Licensing Costs	\$ 150,000	\$ 150,000	\$150,000	\$0.00	\$0.00	\$450,000	Operating Licensing Fees YoY Cost Adjustment (535960)
Materials & Supplies	\$ 100,000	\$ 100,000	\$0.00	\$0.00	\$0.00	\$200,000	Storage
Other Services	\$ 250,000	\$ 250,000	\$0.00	\$0.00	\$0.00	\$ 500,000	Operational workflow support (other dept)
Total	\$2,493,706	\$2,493,706	\$150,000	\$0	\$0	\$5,137,412	



What will the funds be used for?

- Purchase materials and supplies (for example, user licenses)
- Pay labor cost for company that specializes in the implementation of the RMS
- Cover the cost of hiring four limited positions to support the project implementation (5506, 1062, 1053, 1064)
- Cover the cost of RMS integrations with other applications such as JMS, DEM's CAD, JUSTIS, BWC, and others.

High-Level Project Plan

Quarter/FY	Dates of Key Milestones	FY26	FY26	FY26	FY27	FY27	FY27	FY27	FY28	FY29	FY30
		Q2	Q3	Q4	Q1	Q2	Q3	Q4			
Project Initiation	WB1										
Requirement Analysis	WB1.1										
System Design	WB1.2										
Development and Customization	WB2										
Testing and QA	WB2.1										
Testing and User Adoption	WB2.2										
Deployment and Go-Live	WB3										
Post Implementation Review	WB4										

Detail the planning/scoping done to-date for new projects

Discussions

- Internal focus group – SME's from the field, custody operation, and administration.
- External – SFPD, DEM, Courts, SFDA, and other city public safety partners

Research

- Local & State Public Safety Partners
- Vendors

Have you identified a vendor?

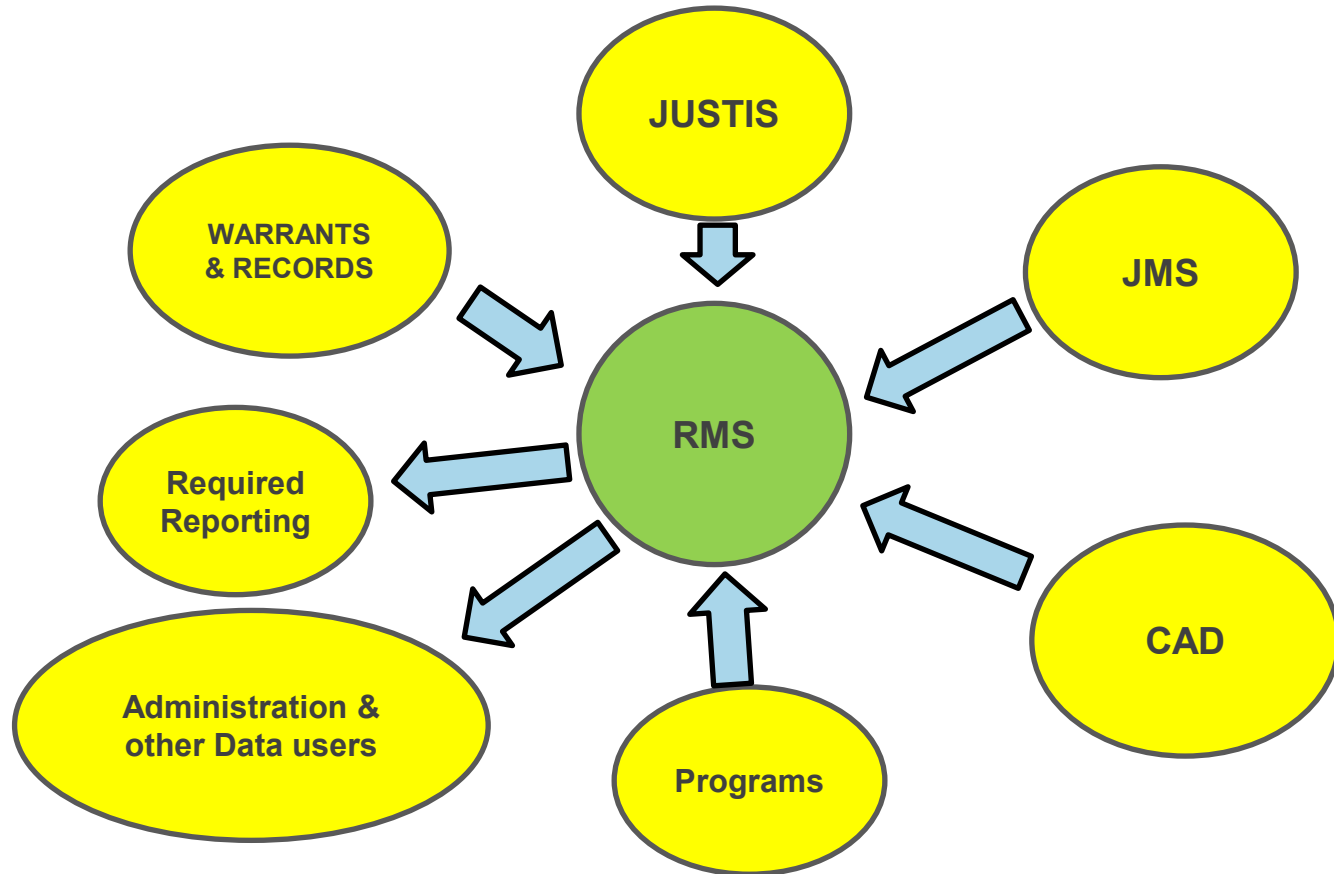
- RIMS Record Management System – Sun Ridge System
- Motorola Premiere RMS or CommandCentral
- Quickset Solution
- Tyler Technology Records Management
- Versaterm RMS

Other Relevant Information

Where we are.



Where we need to be.



Measuring Project Success

- **Key Performance Indicator(s)**

- **Compliance Rate (%)** – Percentage of records managed in accordance with legal and regulatory requirements [50% > 95%]
- **Time Saved in Record Retrieval (%)** – Reduction in time required to retrieve records compared to the previous system. [2 - 3 days > within 1 hour]
- **Incident Report Writing Time (hrs.)** – Average time taken to complete incident reports post - implementation. [3 - 8 hours > 1 hour]

Risk Mitigation Strategies

Project Risk Management Plan

Potential Risk #1: Budget Overrun and/or Vendor Delays	<u>Your Plan to Prepare for/Mitigate this Risk</u> <ul style="list-style-type: none">• Implement Change Control• Monitor Scope Creep• Independent Validation (Vendors/Quotes)
Potential Risk #2: Project Scope Creep (project deliverables expand beyond original plan and exceed available resources)	<u>Your Plan to Prepare for/Mitigate this Risk</u> <ul style="list-style-type: none">• Clearly well-defined scope and objectives• Independent Validation
Potential Risk #3: Staffing/Capacity for Implementation, Deployment, Training	<u>Your Plan to Prepare for/Mitigate this Risk</u> <ul style="list-style-type: none">• Professional services (vendor confidence)• Three COIT project based limited staffing request• Prioritization of tasks

Project Risk Management Plan, Continued

<u>Consequences of Not Funding</u>	<ul style="list-style-type: none">• Regulatory compliance - legal liability & penalties• Operational efficiencies - resource drain, time-consuming processes• Data vulnerabilities - susceptible to unauthorized access• Reduced transparency -erosion of trust• Financial consequences -increased costs and missed opportunities• Officer safety – in jeopardy
<u>Alternate Plans</u>	<ul style="list-style-type: none">• Status Quo• Add more complexity to current workflows and processes in an already overwhelmed function– magnifies the problem

Change Impact Assessment

Impact Analysis	
Dimension of Change	Description of the change
Operational Impact	<ul style="list-style-type: none">• Standardized central data• Streamlined processes and improved efficiencies• Save money and remove waste
Policy & Management Impact	<ul style="list-style-type: none">• Improved decision flows will be better executed by the Sheriff policies. Revisions may be needed to align with the improved automated processes.
Impact to Specific Roles/Teams, Departments, Residents	<ul style="list-style-type: none">• Officer safety – access to all records in a centralized location• Integration with CAD-911 –collect dispatch data about an offender, better equipped to respond• Resource drain looking for records – prevent diversions from critical work

Questions?



San Francisco Digital Services | DataSF

Department of Technology

Scaling a Unified Data Platform for the City

Presentation to the COIT Budget & Performance Sub-Committee

Soumya Kalra, CDO, Digital & Data Services, ADM

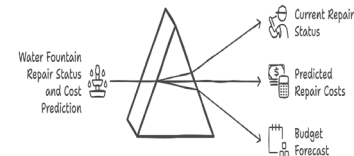
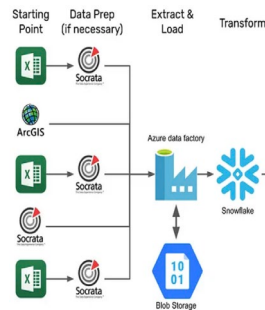
Jeff Johnson, Data Integration/ Platform Lead, Department of Technology

March 14, 2025

Water Fountains in SF



Speaker: Soumya



Collect Data

Unify &
Standardize
Data

Build Data
Pipelines

Visualize
Data

Analyze
Questions

Days to Months

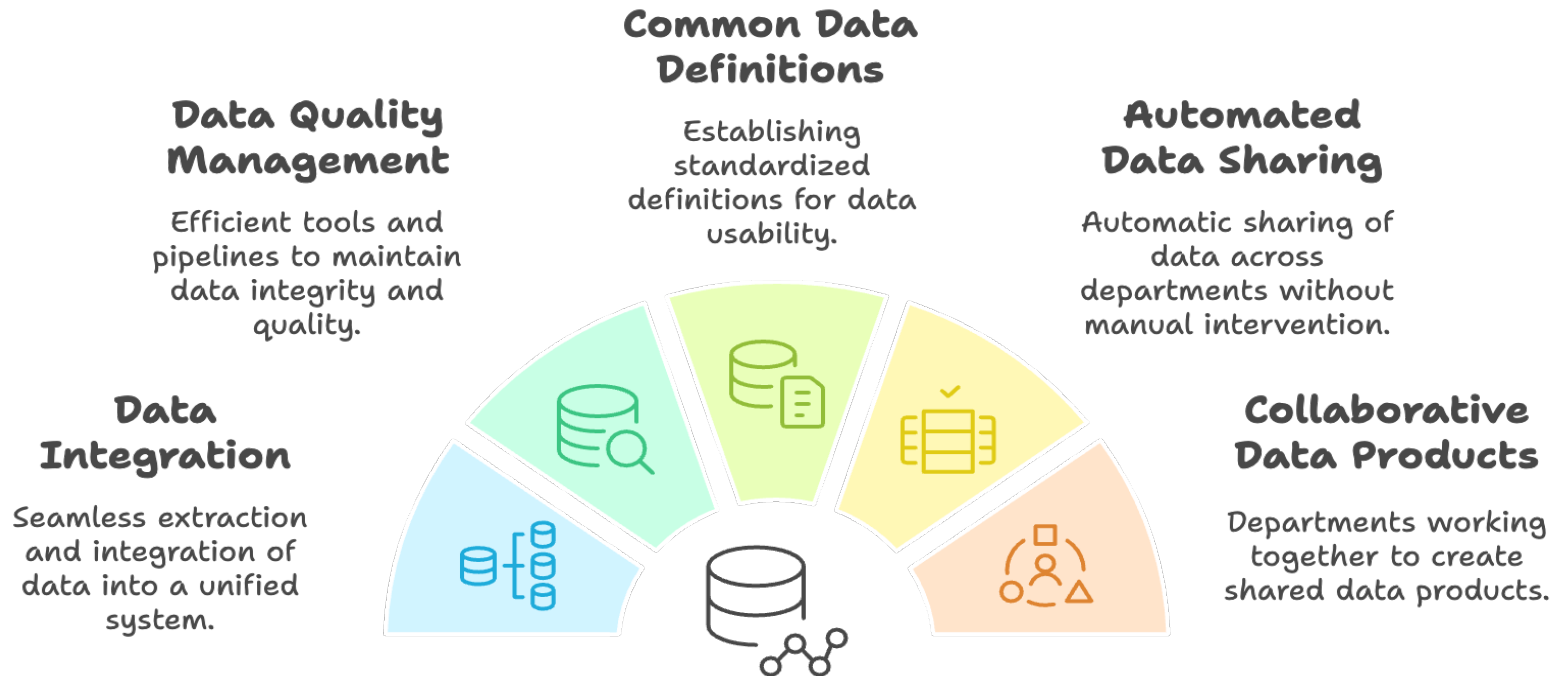
Days to Months

Hours

Hours

Hours to Days

Opportunity to build a truly unified platform



Launched Enterprise Data Warehouse



- ✓ Enterprise agreement with BAA signed
- ✓ Integration with City's SSO
- ✓ 9 departments onboarded & using Snowflake
- ✓ Launched dedicated data warehouse to support near real-time cross-department disaster response (ATC20)
- ✓ Tested out POC for central instance with DataSF & smaller departments
- ✓ Integrated DataSF pipelines used to publish data on internal & external portal

In production

In development

MOHCD

SFO

ADM/
DataSF

DHR

REC

DCYF

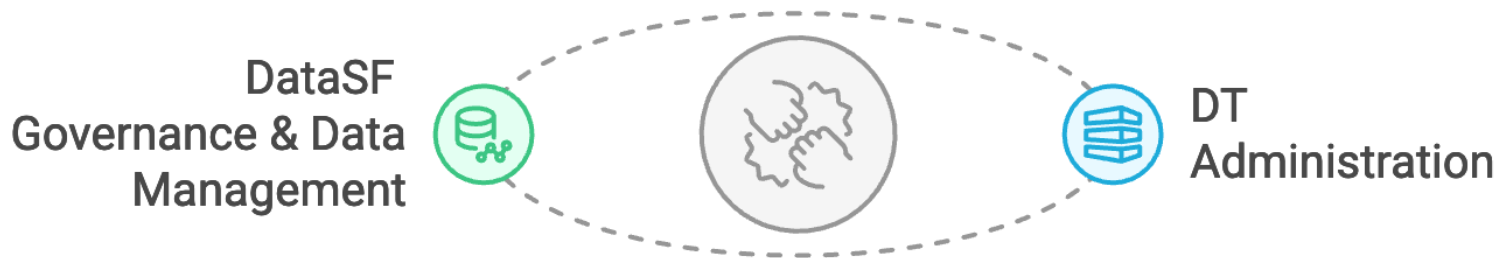
DPH

DEC

DBI

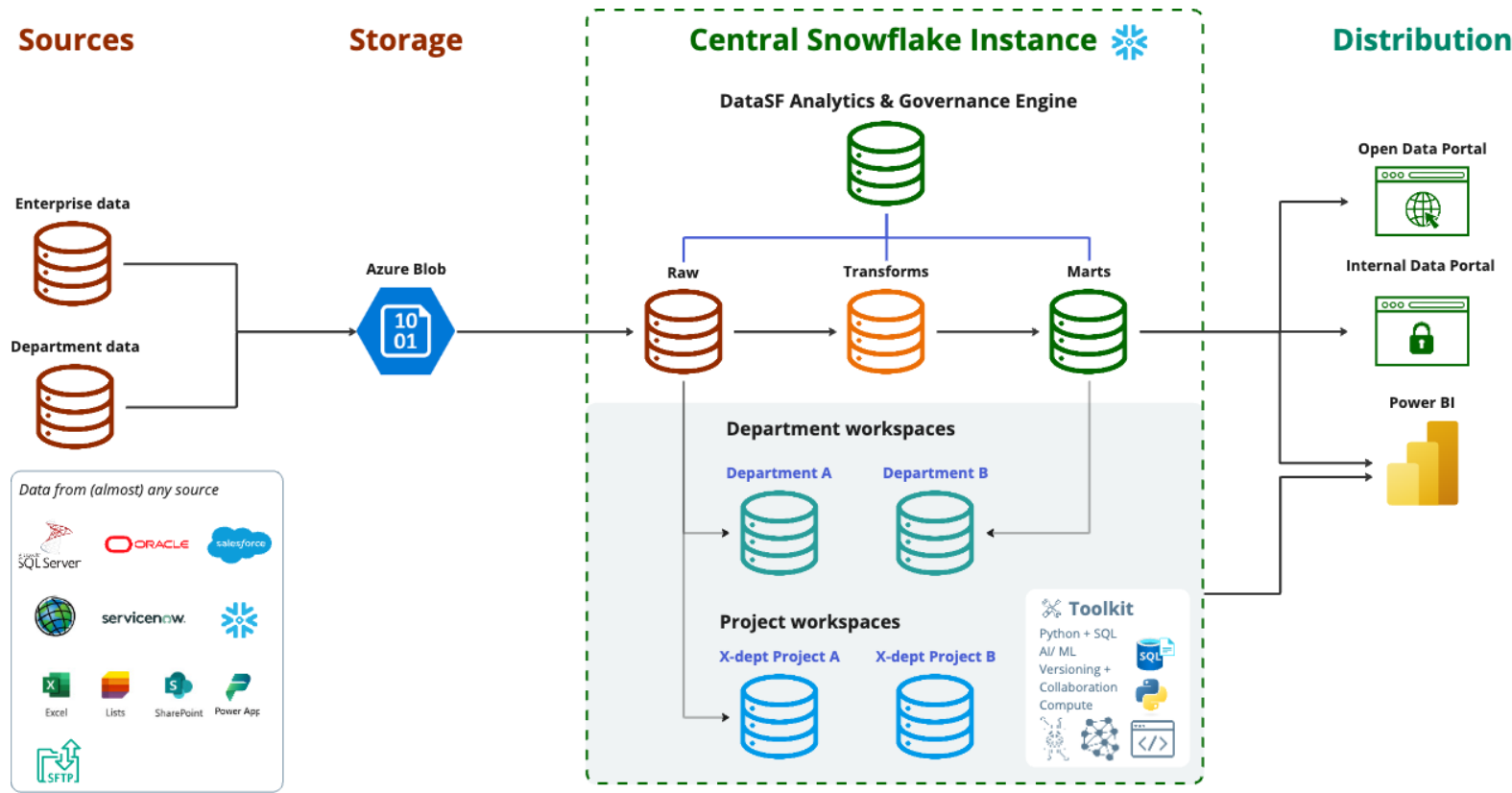


New partnership implementation: DT & DataSF



- Data integration and modeling support
- Instant access to enterprise data
- Easy & efficient data sharing
- Standard definitions and policy
- Enterprise -level governance
- Procurement and Finance
- Security
- Network
- Platform and ETL/ELT Expertise

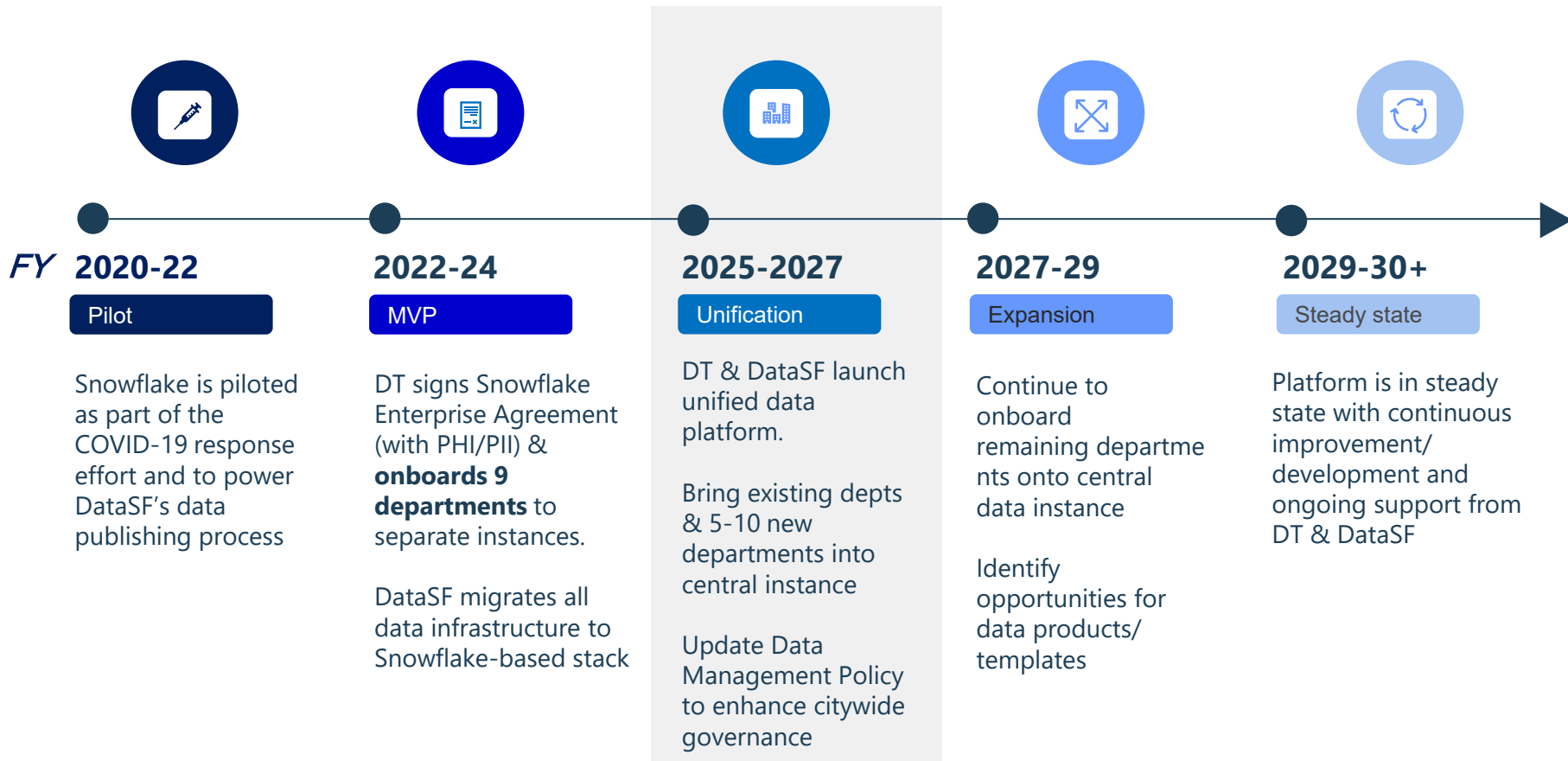
Unified Data Platform Technical Architecture



Orchestration, ELT & versioning



San Francisco's journey to a unified platform



COIT Request Breakdown

SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL
COIT Allocation	\$310,000	\$883,000	\$1,160,000	\$1,338,000	\$0	\$3,691,000
<i>Labor (FTE)</i>	0.75	2.50	3.00	3.00	0.00	9.25
Labor (\$)	\$210,000	\$733,000	\$905,000	\$933,000	\$0	\$2,781,000
Software Costs (\$)	\$100,000	\$150,000	\$255,000	\$405,000	\$0	\$910,000
Non-COIT Funding	\$1,500,000	\$1,511,000	\$1,547,000	\$1,584,000	\$3,628,000	\$9,770,000
USES (COIT & Non-COIT)						
<i>Labor (FTE)</i>	4.75	6.75	7.25	7.25	9.25	35.25
Labor (\$)	\$1,291,000	\$1,935,000	\$2,144,000	\$2,209,000	\$2,915,000	\$10,494,000
Software Licensing Costs (Compute)	\$440,000	\$378,000	\$478,000	\$628,000	\$628,000	\$2,552,000
Software Licensing Costs (Supporting Tools)	\$80,000	\$80,000	\$85,000	\$85,000	\$85,000	\$415,000
Total	\$1,811,000	\$2,393,000	\$2,707,000	\$2,922,000	\$3,628,000	\$13,461,000

Risks in Project Implementation

Potential Risk	Mitigation
Lack of willingness to use the platform	Data management policy change, attractive data & tooling on platform, clear onboarding path to reduce barriers to adoption
Lack of prioritization & capacity	Onboard departments at their speed, invest in relationship management at staff & leadership levels
Project team staffing/ capacity	Re-prioritize existing resources as needed

Risk if Project Not Funded

Consequences of Not Funding	<ul style="list-style-type: none">• Block progress on mayoral priorities• Increased citywide costs for similar data projects• Increased fragmentation of systems and data• Reduced end-to-end visibility across City services
Alternate Plans	<ul style="list-style-type: none">• Reduce unified data platform services and features to minimum and return next funding cycle• Only onboard departments that can provide funding

Questions?

Appendix

Measuring Project Success: KPIs

- Staff time saved & technology spend reduced (e.g. fewer legacy systems & duplicative analyses)
- Growth in compute usage across departments
- # of datasets shared
- # of shared data models & products built (e.g. PermitSF)
- # of departments on platform

Modernization didn't solve data fragmentation on its own

- Lack of connected data models for end-to-end process insights
- Lack of central governance for data shared across city departments & domains
- Lack of tools needed to leverage complex data and build sophisticated models (AI/ML/ predictive)

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	Moving off legacy systems and processes may require tackling technical debt, poor data quality, and developing new processes. This could impact business operations, data, and IT staff.
Policy & Management Impact	Increased need for standardized / citywide data governance in order to leverage data collaboration. Data Management policy should be updated to better support data collaboration.
Impact to Specific Roles/Teams, Departments, Residents	Department analysts and IT staff will need to upskill to learn modern data analysis techniques/ languages and modern data sharing and management approaches Moving off legacy systems and processes may require tackling technical debt, poor data quality, and developing new processes. This could impact business operations, data, and IT staff.

Project 5-Year Financial Forecast

~\$1.2M

SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL
COIT Proposed Allocation	\$310,000	\$883,000	\$1,160,000	\$1,338,000	\$0	\$3,691,000
Non-COIT Funding	\$1,500,000	\$1,511,000	\$1,547,000	\$1,584,000	\$3,628,000*	\$9,770,000
Total Project Funding	\$1,811,000	\$2,393,000	\$2,707,000	\$2,922,000	\$3,628,000	\$13,461,000

**Assumes operationalization into DT Cost Allocation/ Shared Services model from FY29-30 on*

COIT Request Breakdown

SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL
COIT Allocation	\$310,000	\$883,000	\$1,160,000	\$1,338,000	\$0	\$3,691,000
<i>Labor (FTE)</i>	<i>0.75</i>	<i>2.50</i>	<i>3.00</i>	<i>3.00</i>	<i>0.00</i>	<i>9.25</i>
Labor (\$)	\$210,000	\$733,000	\$905,000	\$933,000	\$0	\$2,781,000
Software Costs (\$)	\$100,000	\$150,000	\$255,000	\$405,000	\$0	\$910,000
Non-COIT Funding	\$1,500,000	\$1,511,000	\$1,547,000	\$1,584,000	\$3,628,000	\$9,770,000
USES (COIT & Non-COIT)						
<i>Labor (FTE)</i>	<i>4.75</i>	<i>6.75</i>	<i>7.25</i>	<i>7.25</i>	<i>9.25</i>	<i>35.25</i>
Labor (\$)	\$1,291,000	\$1,935,000	\$2,144,000	\$2,209,000	\$2,915,000	\$10,494,000
Software Licensing Costs (Compute)	\$440,000	\$378,000	\$478,000	\$628,000	\$628,000	\$2,552,000
Software Licensing Costs (Supporting Tools)	\$80,000	\$80,000	\$85,000	\$85,000	\$85,000	\$415,000
Total	\$1,811,000	\$2,393,000	\$2,707,000	\$2,922,000	\$3,628,000	\$13,461,000

JUSTIS - IT

FY 25-26 COIT
Program Request



SAN FRANCISCO
DEPARTMENT OF
TECHNOLOGY

JUSTIS Program Overview

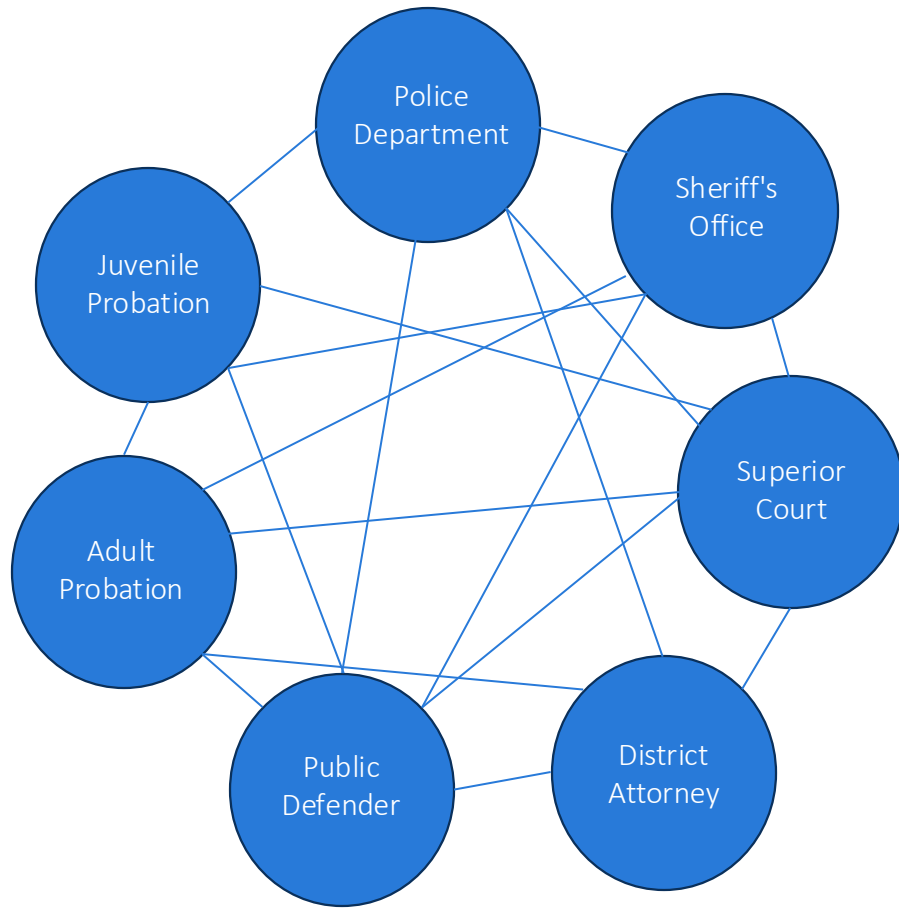
What is JUSTIS?

- **JUSTIS is San Francisco's centralized data-sharing platform for criminal justice agencies. It enhances collaboration, efficiency, and case management across law enforcement, courts, and public safety agencies in a secure data-exchange.**

Why is JUSTIS Important?

- **JUSTIS delivers real-time data to law enforcement and policymakers. By streamlining data exchange, it reduces redundancy, speeds response times, and optimizes resources, thereby strengthening public safety.**

Without JUSTIS



With JUSTIS



JUSTIS Program Overview

Projects

- **JUSTIS Data Exchange**
- **JUSTIS Application Modernization**
- **Microsoft Azure Cloud Migration**

DT is requesting funding for these 3 critical projects needed to modernize and enhance the JUSTIS platform.

Project Overview

Data Exchange

Projects

- **JUSTIS Data Exchange**
- JUSTIS Application Modernization
- Microsoft Azure Cloud Migration

Problem Statement

- Technology which supports the system integration "connectors" between department case management systems needs to be simplified.
- Departments are deploying new systems on modern technologies while JUSTIS still runs on a legacy platform.

Project Objective

- JUSTIS is creating a modern data exchange to allow one reusable connector with JUSTIS without needing to build customized connections.
- Deliver a set of tools to simplify connections.

Project Planning Data Exchange

JUSTIS API Project Phases

- **SF District Attorney -> Information Retrieval - *Complete***
- **SF District Attorney -> Information Updates - *Testing***
- **SF Sheriff -> Record Creation and Updates - *Ongoing***

Projects

- **JUSTIS Data Exchange**
- **JUSTIS Application Modernization**
- **Microsoft Azure Cloud Migration**



Project Overview Application

Projects

- JUSTIS Data Exchange
- **JUSTIS Application Modernization**
- Microsoft Azure Cloud Migration

Problem Statement

- **JUSTIS system relies on outdated software that is costly to maintain, difficult to support, and prone to failure, increasing the risk of service disruptions.**

Project Objectives

- **JUSTIS is modernizing its application using scalable, cost-effective technology to improve resilience, reduce maintenance costs, and enable the city to retire legacy systems while retaining legacy data backwards compatibility.**
- **Consolidating JUSTIS applications into a user-friendly web portal. Project includes the framework for the portal and the end-user features.**

Project Planning Application

Projects

- JUSTIS Data Exchange
- **JUSTIS Application Modernization**
- Microsoft Azure Cloud Migration

JUSTIS Application Modernization Project Phases

- **New JUSTIS Portal Framework – *Development/Testing***
 - IAM Single Sign-on
 - Full-Scale Audit Logging
- **JUSTIS Portal Features - *Ongoing***

Project Overview Cloud Migration

Projects

- JUSTIS Data Exchange
- JUSTIS Application Modernization
- **Microsoft Azure Cloud Migration**

Problem Statement

- **JUSTIS relies on aged, on-premise hardware that needs to be refreshed.**

Project Objective

- **To reduce costs and eliminate the risk of running on aging hardware, JUSTIS will migrate to a cloud-based infrastructure, removing reliance on on-premise hardware and reducing licensing expenses.**

Project Planning Cloud Migration

Azure Migration Project Phases

- **California Department of Justice Application – *In Review***
- **Supporting Infrastructure Services - *Ongoing***
- **Networking & Security - *Ongoing***
- **Workloads in Azure Government - *Planning***
- **Backup Solution - *Planning***
- **Disaster Recovery Strategy - *Planning***

Projects

- JUSTIS Data Exchange
- JUSTIS Application Modernization
- **Microsoft Azure Cloud Migration**

High-Level Project Plan

Key Milestones	FY25	FY25	FY25	FY26	FY26	FY26	FY26	FY27	FY28	FY29
	Q2	Q3	Q4	Q1	Q2	Q3	Q4			
Application										
Framework										
Features										
Data Exchange										
SF DA – Data Retrieval										
SF DA - Update										
SHF – Update & Create										
Cloud Migration										

Project Risk Management Plan

Potential Risk #1: Aging Infrastructure	<u>Your Plan to Prepare for/Mitigate this Risk</u> To mitigate the risk of unrecoverable failure, migrating to Azure Cloud will remove reliance on on-premise hardware, and eliminate hardware licensing costs.
Potential Risk #2: Technical Debt	<u>Your Plan to Prepare for/Mitigate this Risk</u> Technology which supports the system integration "connectors" between department case management systems and JUSTIS is decades behind. Departments are deploying new systems on modern technologies while JUSTIS still runs on a legacy platform. To mitigate, JUSTIS is employing modern technologies to allow new systems to connect with JUSTIS without building customized connections.
Potential Risk #3: Staffing Shortage	<u>Your Plan to Prepare for/Mitigate this Risk</u> JUSTIS-IT staffing levels are much lower than comparable criminal justice systems in similarly-sized cities. JUSTIS has 5 full-time employees supporting 24/7 operations and we are seeking COIT project funding to augment the core team.

JUSTIS Roadmap Budget FY'25 – FY'26

		FY2025-26	FY2026-27	FY2027-28	FY2028-29	FY2029-2030
Total Project Costs	High	Upcoming Need = \$2.25M <u>Carry Forward – Estimate: \$1.2M</u> Net Ask = \$1.05M	\$1.6M	\$1.6M	\$1.6M	\$1.6M
	Low	\$1.05M	\$1.48M	\$1.48M	\$1.48M	\$1.48M
Funding requested from COIT		\$1.05M	\$1.6M	\$1.6M	\$1.6M	\$1.6M

Breakdown of Funding Ask:	FY2025-26
JUSTIS Staffing:	
JUSTIS IS Business Analyst TEX 1052	\$193,000
JUSTIS IS Business Analyst – Senior TEX 1053	\$219,000
Python Developer TEX 1063	\$209,000
Project Manager 5502	\$257,000
ETL Contractor	\$450,000
Hub Enhancements	
Data Lake/Data Warehouse licensing	\$75,000
Data Catalog / On-Prem AI Capabilities	\$50,000
Oracle Licenses & Oracle SOA	\$400,000
Azure Migration & Subscription	\$200,000
AD Migration	\$200,000
Engineer cloud back-up environment	Existing Staff
Project Carryforward – Estimate	-\$1,200,000
Total:	\$1,053,000

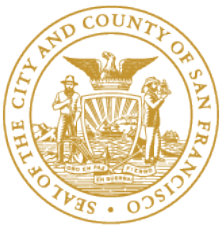
Questions?



SAN FRANCISCO
DEPARTMENT OF
TECHNOLOGY

Project Risk Management Plan, Continued

<u>Consequences of Not Funding</u>	<p>Not funding JUSTIS would cause significant impacts to the operations of San Francisco’s criminal justice system. Agencies such as the SFPD, Sheriff, DA, Public Defender, Courts, Adult Probation and Child Probation would have to dedicate more administrative resources to exchanging information between agencies.</p> <p>Partial funding of JUSTIS could significantly delay our projects on cloud migration, the data exchange, and application modernization. Thus, increasing our reliance on aging hardware and software and exposing JUSTIS to increased risk of an outage.</p>
<u>Alternate Plans</u>	<p>JUSTIS will continue to prioritize our projects, albeit with very limited resources. Previously-mentioned risks will remain in place until project work</p>



CONTROLLER'S OFFICE, AOSD

Presentation to COIT Budget & Performance Subcommittee

Financial Reporting Automation

March 14, 2025

Project Overview

- **Problem Statement**

- Highly manual financial reporting process leading to inefficiencies and errors
- Lack of integration between data sources, requiring extensive reconciliation
- Inconsistent formatting and reporting practices across departments
- Manual review process spread out over multiple documents using different software

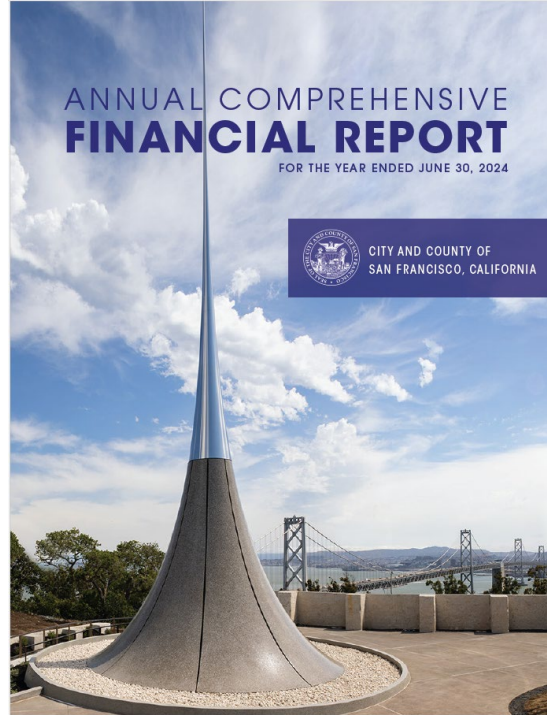
- **Project Objective**

- Efficient Review & Collaboration
- Data Linking & Automation
- Standardized Formatting
- Better Succession Planning & Training
- Enhanced financial reporting controls with better documentation and auditability

San Francisco Charter

SEC. 3.105. CONTROLLER; CITY SERVICES AUDITOR; INSPECTOR GENERAL.

(f) The Controller shall within **150** days of the end of each fiscal year prepare an annual report of the financial condition of the City and County. Such annual report shall be prepared in accordance with generally accepted accounting principles. The annual report shall contain such information and disclosures as shall be necessary to present to the public a full and understandable report of all City and County financial activity.



CITY AND COUNTY OF SAN FRANCISCO, CALIFORNIA

Annual Comprehensive Financial Report
Year ended June 30, 2024

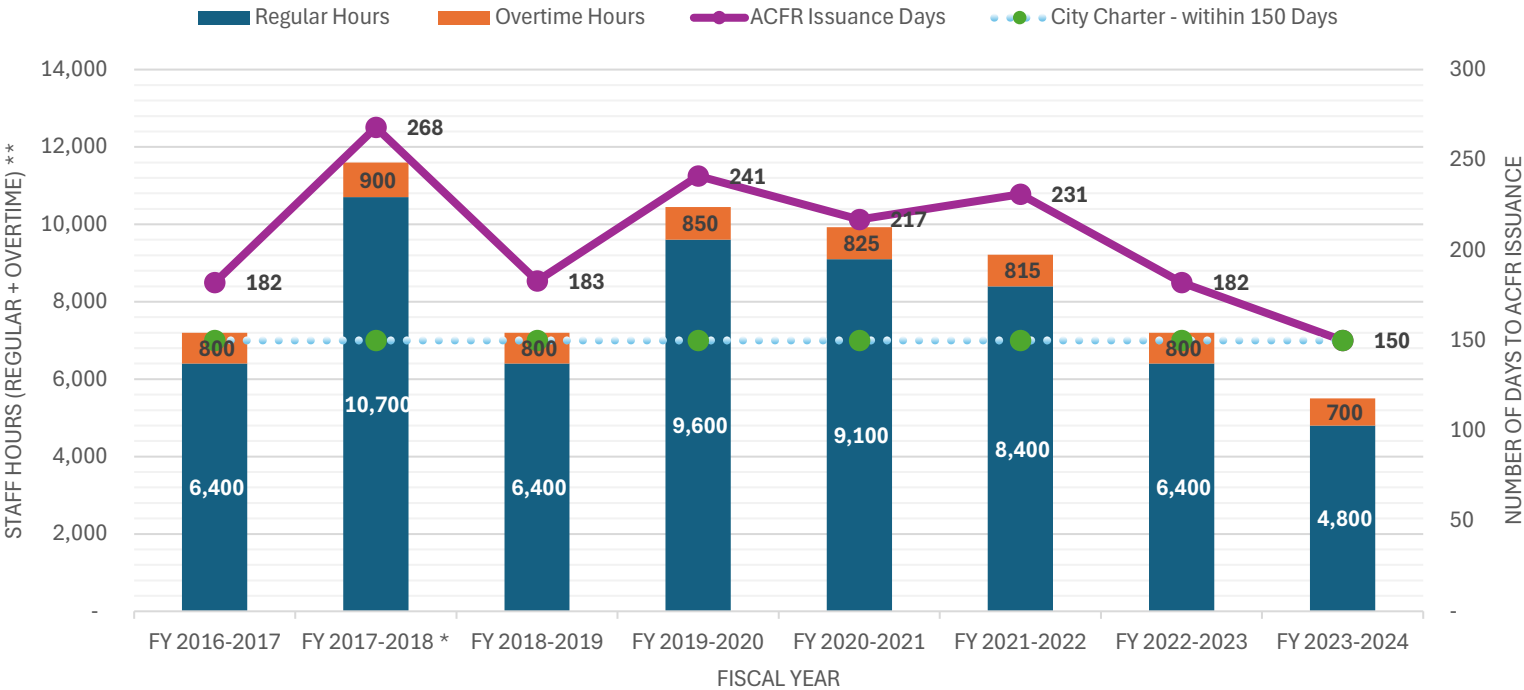


Prepared by:
Office of the Controller

Greg Wagner
Controller

Annual Comprehensive Financial Report (ACFR)

ACFR Issuance Days and Staff Hours Over 8 Years



* FY 2017-2018 is the first fiscal year using PeopleSoft data for ACFR

** Staff hours are estimated

Annual Comprehensive Financial Report (ACFR)

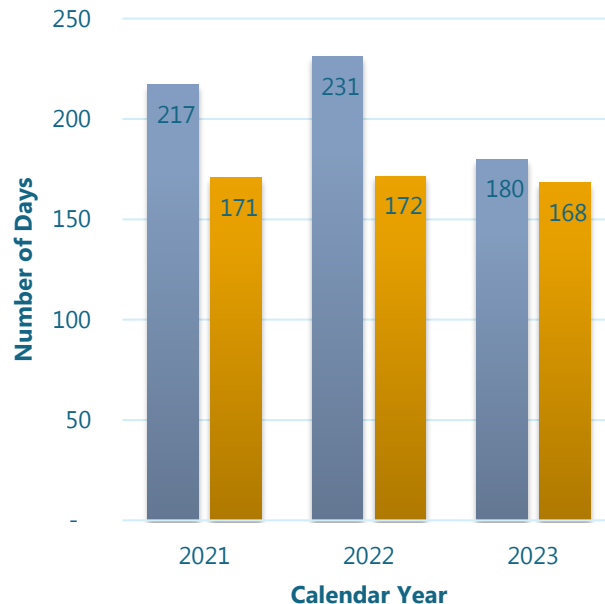
2021-2023 Revenue and ACFR Issuance Days by City

\$ in millions

City	Revenue			Number of Days of Issuance		
	2021	2022	2023	2021	2022	2023
New York, NY	\$ 104,176	\$ 107,535	\$ 110,250	121	119	118
*Los Angeles, CA	\$ 18,364	\$ 19,953	\$ 21,634	210	209	208
Washington, DC	\$ 18,370	\$ 19,362	\$ 19,261	116	116	116
*Chicago, IL	\$ 12,909	\$ 12,848	\$ 15,025	180	181	180
San Francisco, CA	\$ 13,107	\$ 13,375	\$ 14,206	217	231	182
Philadelphia, PA	\$ 8,764	\$ 10,214	\$ 10,850	240	240	239
*Houston, TX	\$ 6,339	\$ 6,763	\$ 6,851	163	172	140
*Seattle, WA	\$ 5,154	\$ 5,620	\$ 5,786	179	179	179
Phoenix, AZ	\$ 4,961	\$ 5,690	\$ 6,011	163	169	168
Austin, TX	\$ 4,436	\$ 5,204	\$ 5,688	165	159	164

* Used automation software

ACFR Issuance Timeline:
San Francisco vs. Major Cities



■ San Francisco

■ Average Top 10 Cities (excluding San Francisco)

Project 5-Year Financial Forecast

	FY24-25 (Actual)	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30
COIT Allocation	\$-	\$725,000	\$740,750	\$757,603	*\$275,635	*\$294,929
Other Sources	\$285,010	\$177,657	\$177,657	\$88,828	\$-	\$-
Total Project Funding	\$285,010	\$902,657	\$918,407	\$846,431	\$275,635	\$294,929

* Operationalize for CON's budget

Project 5-Year Financial Forecast – Detail

Financial Reporting Automation (AOSD)

COIT Request

Request	Type	Account Description	FY25 (Actual)**	FY26	FY27	2-year Total
None	Position	Labor (net new CCSF FTEs)	\$ -	\$ -	\$ -	\$ -
Software Licenses & Support (licenses)-base AOSD	Non-Position	Software Licenses & Support	-	225,000	240,750	465,750
System Implementation	Non-Position	Professional Services	-	500,000	500,000	1,000,000

Position Subtotal	Position		-	-	-	-
NON-Position Subtotal	Non-Position		-	725,000	740,750	1,465,750

Total Requested			\$ -	\$725,000	\$740,750	\$1,465,750
------------------------	--	--	-------------	------------------	------------------	--------------------

CON Funded

Current staff time*	Position	Labor	\$57,787	\$177,657	\$177,657	\$355,314
Software Licenses & Support (licenses)-base AOSD	Non-Position	Software Licenses & Support	98,423	-	-	-
System Implementation	Non-Position	Professional Services	128,800	-	-	-

Position Subtotal	Position		57,787	177,657	177,657	355,314
NON-Position Subtotal	Non-Position		227,223	-	-	-

Total CON Funded			\$285,010	\$177,657	\$177,657	\$355,314
-------------------------	--	--	------------------	------------------	------------------	------------------

Total Project			\$285,010	\$902,657	\$918,407	\$1,821,064
----------------------	--	--	------------------	------------------	------------------	--------------------

* FY25 staff time is actual for the pilot including contracting, FY26 & FY27 is 3 FTE for 3 months, FY28 is half of FY27 (due to implementation completion early in the year)

** FY25 amounts (prior to COIT requests) are not included in the 5-year total

FY28	FY29	FY30	5-year Total
\$ -	\$ -	\$ -	\$ -
257,603	275,635	294,929	1,293,916
500,000	-	-	1,500,000

-	-	-	-
757,603	275,635	294,929	2,793,916

\$757,603	\$275,635	\$294,929	\$2,793,916
------------------	------------------	------------------	--------------------

\$88,828	\$ -	\$ -	\$444,142
-	-	-	-
-	-	-	-

88,828	-	-	444,142
-	-	-	-

\$88,828	\$ -	\$ -	\$444,142
-----------------	-------------	-------------	------------------

\$846,431	\$275,635	\$294,929	\$3,238,058
------------------	------------------	------------------	--------------------

What will the funds be used for?

- The funds will be used to *implement automation software*, a cloud-based financial reporting platform, to streamline and automate the ACFR preparation process.
- We will use the funds to support *software integration*, ensuring automation software connects seamlessly with our existing systems like PeopleSoft.
- The funds will also help *train staff* on how to use automation software effectively, improving efficiency and reducing manual work.
- Resources will be allocated to *configuring the platform* to meet the City's specific financial reporting needs.

Project Planning

- **Needs Assessment & Problem Identification**

- Conducted stakeholder interviews with financial reporting staff, auditors, and department leads.
- Identified inefficiencies in the current manual financial reporting process, including excessive data reconciliation, error-prone manual workflows, and cumbersome review process.
- Determined the need for an integrated cloud-based financial reporting solution to improve accuracy, efficiency, and collaboration.

- **Vendor Selection & Solution Alignment**

- Discussed financial reporting automation software with GFOA participants at June 2024 conference.
- Evaluated multiple vendors for financial reporting automation.
- Selected automation software as the preferred vendor due to its ability to integrate with PeopleSoft, automate data linking, and enhance version control.
- Piloted software using existing 2023 and 2024 ACFR data to assess automation software's capabilities to meet City-specific reporting needs.

- **Budgeting & Resource Planning**

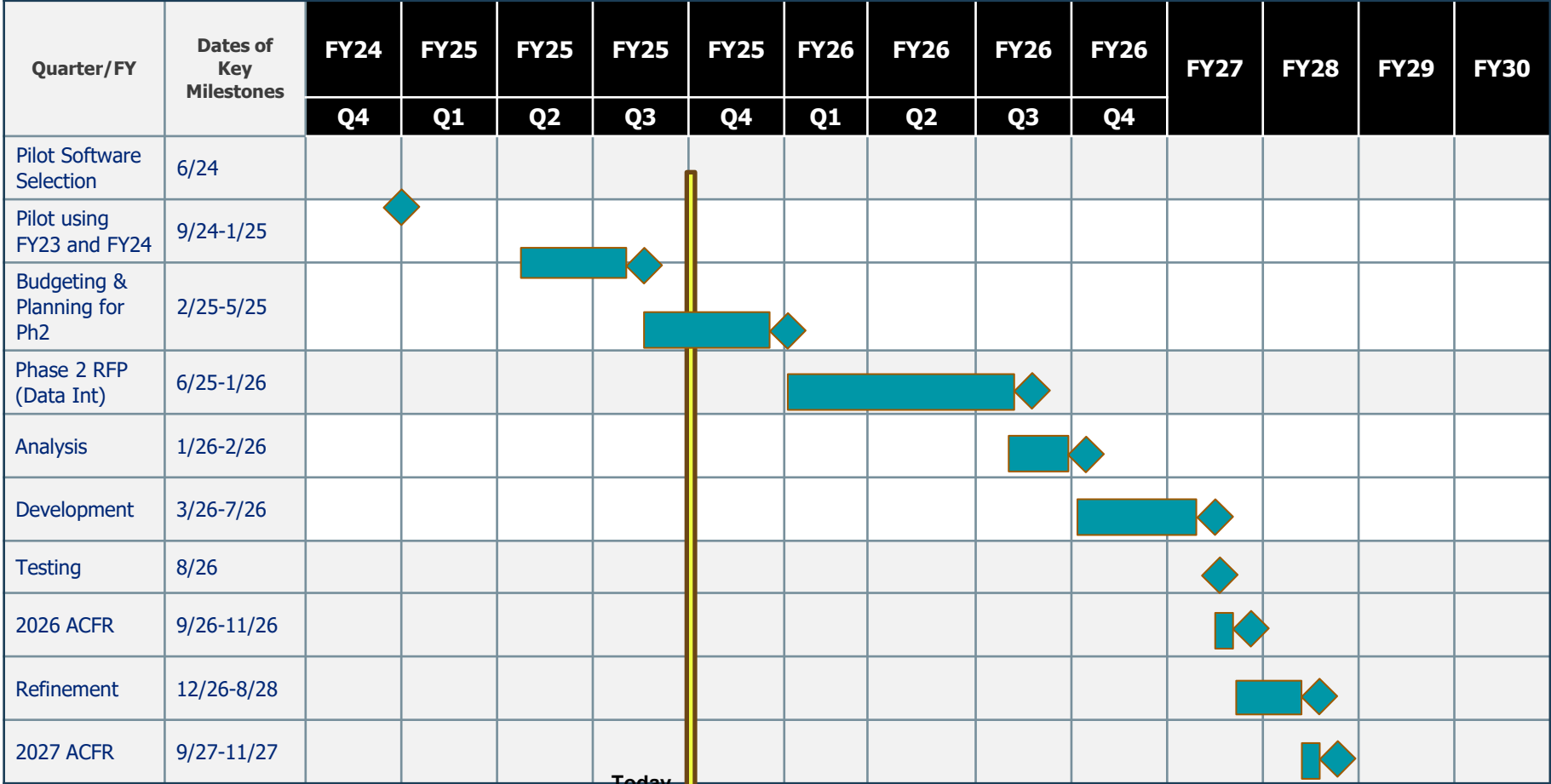
- Developed a cost estimate including software licensing and implementation support.
- Initiated initial funding approvals and outlined a phased implementation plan to ensure a smooth transition.

Measuring Project Success

- **Key Performance Indicators**

- **ACFR Timeliness:** Number of days after year-end to issue the ACFR, ensuring compliance with the 150-day Charter requirement.
- **Operational Efficiency:** Reduction in total staff hours, including overtime, needed to complete the ACFR.
- **Recognition & Compliance:** Attainment of the Government Finance Officers Association (GFOA) Certificate of Achievement for Excellence in Financial Reporting. Increase the credibility for debt issuance and grant application.

High-Level Project Plan



Risk Mitigation Strategies

Project Risk Management Plan

Budget Overrun and/or Vendor Delays	The software is a standard SaaS product at a predetermined cost. The City has already performed a pilot of the FY2023 and FY2024 ACFR to validate suitability to and to gain knowledge for the next phase in confirming requirements and professional services scope and cost
Project Scope Creep (<i>project deliverables expand beyond original plan and exceed available resources</i>)	The project is limited in scope to production of the ACFR only with experienced ACFR staff involved in the planning and implementation phases. We are including only Citywide ACFR reporting requirements – we will not include additional Enterprise departments’ reporting requirements (e.g. FAA, FERC, CPUC, etc.) or use of other software features.
Staffing/Capacity for Implementation, Deployment, Training	In addition to the scope limitations above, the affected staff will participate in the implementation. Other AOSD staff can be called in to assist if needed.

Project Risk Management Plan, Continued

<u>Consequences of Not Funding</u>	Without a new financial reporting platform, there are limited opportunities to improve our financial reporting process, so we would struggle to issue our reports on the timeline mandated by the City Charter and incur additional staff time in doing so. The software would replicate some functionality that was present in FAMIS (which was highly customized) and the associated EIS which was designed around our reporting needs. In addition, not adopting a Citywide platform for financial reporting may cause Enterprises to seek their own solutions which may make Citywide solutions more costly and difficult in the future.
<u>Alternate Plans</u>	Our current process uses PeopleSoft queries downloaded into Excel which are cut-and-pasted into MS Word. Without a new financial reporting platform, we would continue to use current manual methods of producing financial reports.

Change Impact Assessment

Impact Analysis	
Dimension of Change	Description of the change
Operational Impact	The impact is to the City's financial reporting and external audit processes.
Policy & Management Impact	Separate issuers (Enterprises) will need to make adjustments to standardize and streamline their financial reporting in order to join the platform (this should be a minimal impact).
Impact to Specific Roles/Teams, Departments, Residents	The only impact is to financial reporting staff at the various departments who could experience difficulty in implementation. We will mitigate this risk by including comprehensive hands-on training and additional support in the contract for Systems Implementation.

COIT Request Breakdown

SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL	Comments/Description
COIT Allocation	\$725,000	\$740,750	\$757,603	\$275,635	\$294,929	\$2,793,916	
Non-COIT Funding	177,657	177,657	88,828	-	-	444,142	
USES – Coit Funding	-	-	-	-	-	-	
Salaries Positions	-	-	-	-	-	-	
Mandatory Fringe Benefits	-	-	-	-	-	-	
Total Labor	-	-	-	-	-	-	
Deployment Services	-	-	-	-	-	-	
Other Professional Services	500,000	500,000	500,000	-	-	1,500,000	System Implementation
Software Licensing Costs	225,000	240,750	257,603	275,635	294,929	1,293,916	Software Subscription - AOSD
Services Of Other Depts	-	-	-	-	-	-	
Total COIT Allocation	\$725,000	\$740,750	\$ 757,603	\$ 275,635	\$294,929	\$2,793,916	



Before & After Visualizations

Before Automation



☐ Manual & Error-Prone Reporting

☐ Decentralized Data Storage

☐ Manual Error Identification & Correction

☐ Demand for a Streamlined, Automated, and Centralized Solution

After Automation



☐ Integrated & Automated Processes

☐ Cloud-Based Financial Reporting

☐ Enhance Efficiency & Accuracy by Automated Review

☐ Scalable & Adaptable for Citywide Use



Board of Supervisors

New Legislative Management System

Presentation to COIT Budget & Performance Subcommittee

March 14, 2025



Project Objective

Legislate, Automate, Innovate

- Implement a new, state-of-the art legislative management system
 - Innovate Legislative Drafting Tool for departments to confidentially draft legislative items
 - Create Online Public Portal with a Heat Map for tracking legislative items
 - Achieve integrated agenda, meeting, and minutes management
 - Automate legislative process from submission to codification in the Municipal Code
 - Provide a legislative management system for city boards, commissions, and task forces
 - Serve as a records repository for preserving the last century of the City's legislative history and saving department reports and records associated with each file



Functional & Technical Requirements

Complete list of requirements gathered from -

<u>Stakeholder</u>		<u>Example Feedback Added to Requirements</u>
Subject-matter-expert users in Clerk of the Board		Automate Legislative Process from Submission to Codification
District Offices		Submission of Legislation in the System with a Checklist
Secretaries of city commissions, boards, and task forces		Boards and Commissions System
Members of the public through Voice of the Customer Research		Public Portal with Heat Map for Tracking Legislation
Liaisons from the top ten departments using the current system:		
<u>Departments</u>		
City Administrator	District Attorney	Confidential Legislative Drafting Tool
Airport	Public Health	Platform Independent Accessibility to the Public
City Attorney	Mayor	Enhanced Searching, Querying, and Reporting
Controller	Police	Records Respository of Legislation, Reports, and Contracts
City Planning	Technology	Interfacing to other City IT Systems



Project Highlights

Phase 1 to Replace the Legacy System is Nearing Completion

- Database and Application Design - COMPLETE
- Data Migration – COMPLETE
- Legislative Introduction – COMPLETE
- Agenda, Meeting, Minutes, & Online Public Portal – NEARING COMPLETION

\$1,000,000 of Existing COIT Funding to Replace Legacy System Fully Expended by June 30, 2025.

The City owns the New Legislative Management System and will receive revenue from licensing to other Governments

COIT Funding Request of \$2,000,000 is for Phase 2 to Add the Following Innovations for San Francisco:

- Legislative Drafting Tool for Departments
- Boards and Commissions
- LBE Subcontractor Requirement for Language Translation

Other Governments are also interested in the above innovations



Project 5-Year Financial Forecast

SOURCES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL
COIT Allocation	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ 2,000,000
COIT Allocation - Contingency		\$ 2,000,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 2,750,000
Non-COIT Department Funding	\$ 2,761,590	\$ 2,334,163	\$ 536,543	\$ 413,034	\$ 389,040	\$ 6,434,370
Total Sources	\$ 4,761,590	\$ 4,334,163	\$ 786,543	\$ 663,034	\$ 639,040	\$ 11,184,370
USES	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL
Professional Services - Phase 2						
Legislative Drafting Tool	\$ 560,000					\$ 560,000
Boards and Commissions	\$ 1,120,000					\$ 1,120,000
LBE Subcontractor Requirement	\$ 320,000					\$ 320,000
Professional Services - Phase 3		\$ 1,750,000				\$ 1,750,000
Software Maintenance		\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 1,000,000
Total Uses - COIT	\$ 2,000,000	\$ 2,000,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 4,750,000
Matching by Clerk of the Board	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	TOTAL
Salaries	\$ 1,672,564	\$ 1,545,831	\$ 261,816	\$ 173,596	\$ 156,457	\$ 3,810,264
Mandatory Fringe Benefits	\$ 669,026	\$ 618,332	\$ 104,727	\$ 69,438	\$ 62,583	\$ 1,524,106
Total Labor	\$ 2,341,590	\$ 2,164,163	\$ 366,543	\$ 243,034	\$ 219,040	\$ 5,334,370
Capital Outlay - Servers & Backups	\$ 420,000	\$ 170,000	\$ 170,000	\$ 170,000	\$ 170,000	\$ 1,100,000
Total Uses - Department	\$ 2,761,590	\$ 2,334,163	\$ 536,543	\$ 413,034	\$ 389,040	\$ 6,434,370



Project Success Plan

Consequences of Not Funding	City will be stuck with existing Granicus system. City will be unable to add innovations to legislative management. City will be unable to license the system to other governments.
Change Management Plan	<ul style="list-style-type: none">• Requirements gathered from key stakeholders• Confidentiality and contact information privacy policy
<u>Risk #1</u> : Budget Overrun and/or Vendor Delays	<ul style="list-style-type: none">• Phase 1 to replace the legacy system is nearing completion• System is flexible and configurable• Implement innovations in parallel• Agile method to closely monitor contractor performance
<u>Risk #2</u> : Project Scope Creep (<i>project deliverables expand beyond original plan</i>)	<ul style="list-style-type: none">• Scope of work with complete list of functional and technical requirements has been gathered• Contractor has agreed to scope of work
<u>Risk #3</u> : Staffing/ Capacity for Implementation, Deployment, Training	<u>Training Plan</u> : <ul style="list-style-type: none">• The vendor will be required to write a user manual.• The vendor will provide training to users in Clerk of the Board.• Clerk of the Board staff and vendor will collaborate to provide training to department users.



Questions?

Project Champion:

- Angela Calvillo, Angela.Calvillo@sfgov.org

Project Sponsor:

- Alisa Somera, Alisa.Somera@sfgov.org

Project Managers:

- Edward de Asis, Edward.Deasis@sfgov.org
-

Adjournment