

City and County of San
Francisco

Planning Department

Department of Building
Inspection



Daniel Lurie, Mayor
Sarah Dennis Phillips, Director
David Kane, S.E., Interim Director

To: Civil Service Commission

From: Sarah Dennis Phillips, Director, San Francisco Planning

RE: Materials for June 18th, 2026 Commission Hearing

Date: June 17th, 2026

Materials for June 18th, 2026 Commission Hearing

I. Overview

Since the May 18th hearing, we have appreciated the opportunity to engage directly with Local 21. The union sent two sets of questions, and we responded in detail (the answers that were delivered to the union are included in this packet in full). In addition to the questions, we were also able to hold two in-person meetings (June 15th & June 16th), focused on answering follow-up questions to our RFI responses and discussing the knowledge transfer from OpenGov to City employees.

We appreciate the Commission's directive to engage with the union, and we also recognize that we can—and must—do a better job communicating with our staff. This is a project with an ambitious timeline in order to meet the moment for the City's recovery, but we are committed to not letting that timeline get in the way of more frequent and transparent communication with staff. We have been hard at work in introducing those improvements, with multiple pieces occurring this week, and we look forward to going into more detail during the hearing.

Ahead of the June 18th hearing, we are sending over a packet of materials, outlined in full in the next section.

II. List of Materials Included

- a. Our full responses to the union's questions
 - i. One sent June 8th that responded to the union's initial set of questions requested on May 28th. **(Appendix A)**.
 - ii. A second sent June 12th the responded to the union's follow-up questions requested on June 8th **(Appendix B)**.
- b. A condensed version pulling out the information directly responsive to the questions you had for us at the May 18th hearing **(Appendix C)**.
 - i. During our in-person meetings, the union asked for more specificity on the staff transition plan than our June 8th response provided.

We've included that additional detail in an effort to be responsive to their request.

III. Closing

Thank you to the Commission for your thoughtful engagement with us. We know we can do better, and we are committed to doing so. With the project still in its early, fluid, stages, we acknowledge there are things we may not always be able to answer immediately while they remain in active planning stage. That said, we are committed to sharing those plans with you as they are finalized. Thank you for your time.

IFPTE Local 21
Request for Information

City and County of San Francisco
Carol Isen
Human Resources Director



Department of Human Resources
Connecting People with Purpose
www.sfdhr.org

Via Email

DATE: June 8, 2026

TO: Emily Wallace, Representative, IFPTE Local 21

FROM: Greg Stalfa, Employee Relations Representative

CC: Mark Weirick, Regional Director, IFPTE Local 21
Jessica Nuti, Representative, IFPTE Local 21
Elizabeth Watty, Director of PermitSF & Director of Current Planning
Rebecca Villareal-Mayer, Director, Joint Technology Division
Claire McCaleb, Acting Classification and Compensation Director
Ardis Graham, Employee Relations Director
Jonathan T. Wright, Assistant Employee Relations Director

RE: International Federation of Professional and Technical Engineers, Local 21 - Request for Information – Personal Service Contract DHRPSC0006234

Dear Emily Wallace,

The City and County of San Francisco (City) is in receipt of your Request for Information (RFI) dated Thursday, May 28, 2026, regarding Personal Service Contract number DHRPSC0006234 (PSC 6234). The City submits the responses below in [blue font](#) in satisfaction of this request.

1. The City's 9/2/25 response does not adequately address our request for information. The selection of a proprietary vendor is irrelevant. The Union is requesting copies of any studies and/or assessments that were conducted *prior* to vendor selection, to support the Department's position that this scope of work could not be performed by our existing civil service classifications. **Did the City conduct any feasibility studies and/or assessments to confirm that this scope of work could not be performed by our existing civil service classifications and needed to be performed by a proprietary vendor? If so, please provide a copy of these studies and/or assessments.**

[The City did not feel that a feasibility study was warranted. Independent expert guidance, departmental consensus, vendor restrictions, and established Information & Communication Technology \(ICT\) policy collectively provided sufficient basis for this determination, as outlined below.](#)

[Expert recommendation and departmental agreement](#)

[In 2023 the City retained Gartner Consulting to assess technology modernization efforts. Gartner concluded that a Low-Code Application Platform \(LCAP\) was the best fit because its](#)

modular design drastically accelerates implementation while allowing cross-departmental City staff to collaboratively configure, scale, and maintain permitting workflows without relying on highly specialized, obsolete code. The Department of Building Inspection, the Planning Department, and the City Administrator's Permit Center Division all reviewed and agreed with that recommendation to address the urgent need to modernize legacy permitting technology that was reaching its end of life.

Alignment with the City's ICT strategy

The City's ICT plans have for many years directed departments towards modern Software as a Service (SaaS) platforms. Moving to cloud-hosted SaaS models ensure greater data security, operational adaptability, and modern customer experiences, allowing multiple departments to share a unified infrastructure. This is codified in Committee on Information and Technology's (COIT) Cloud Acquisition and Management Policy and reaffirmed in the FY 2026–2027 ICT Plan update, which establishes cloud infrastructure as the default for City technology and directs all departments to adopt cloud services.

Vendor-only implementation

The products under consideration are proprietary systems. Initial setup is restricted to the vendors themselves — City staff are not authorized to perform it.

2. Please provide full list of all city employees that currently have admin access and which ones will be included in the 3 year term. Please provide their first name, last name, and job classification.

See staff list table that includes current roles and responsibilities, below (page 4).

3. The City's 4/8/26 response does not adequately address our request for information. Local 21 requests a detailed transition plan for how the work to be contracted out will return to the City's workforce on or before the conclusion of the duration of this PSC. **What steps, if any, has the City taken to create a definitive schedule for the full transfer of technical tasks back to in-house staff? Local 21 requests a clear and enforceable knowledge transfer plan showing how this specific scope of work will be transitioned back to our in-house civil service classifications prior to the end date for PSC 6234.**

The City is currently developing a plan to transition specific technical components back to civil service employees. We are working with OpenGov to formalize this approach in a new Statement of Work for the contract amendment. Though the proposal is not yet final, the framework and timeline have been established – see below in our response to Question 12 (page 37).

Project Phase/Timeline	Vendor Activity	Knowledge Transfer Tactic
Year 1 (FY26) Active Learning	Foundation & Setup Vendor configures the system, connects/integrates to core City systems, and hands over administrative controls.	Side-by-Side Mentorship Internal technical staff partner directly with the vendor team to map business process logic, train internal staff, set up user roles and permissions, and enable

		management of administration tools.
Year 2 (FY27) Co-Delivery	Shared Ownership City begins to manage technology changes to the platform and workflow. Vendor transitions to an advisory role and responds to requests for design revisions on live applications.	Collaborative Building As new platform components are configured and finalized, City staff will assume responsibility for standard software administration, including workflow updates, mappings and custom integrations.
Year 3 (FY28) Full Autonomy	Support/Advisory Vendor engagement is limited to standard global SaaS cloud maintenance or updates, and staff support upon request.	Internal Mastery City assumes the lead support role by standardizing core configuration and deployment support to assist with onboarding future agencies.

- During the Civil Service Commission Meeting on May 18, 2026, Department leadership provided a slide deck showing 21 total IFPTE-represented positions that are currently providing technical support to PermitSF. Between DBI and CPC, our records indicate there are 38 total employees in the listed classifications. **Local 21 requests an organizational chart showing which specific employees occupy the 21 positions currently providing technical support to PermitSF, including first name, last name, classification, Department, and division. Please provide a description of the day-to-day technical tasks that each of the 21 listed employees are responsible for performing. For the remaining 17 positions in the relevant classifications, Local 21 requests an organizational chart showing their current Department and division assignment.**

The following is a modified version of the slide presented at the 5/18 Civil Service Commission Hearing to show the associated staff. This staffing list represents the primary departmental core team helping to implement and maintain the new platform.

In addition to the Planning staff listed below and the robust participation from front line city staff who are permitting experts and core to the development of the product, project implementation also depends on the City’s extensive network of civil service professionals in Central Support agencies like DataSF, Digital Services, and the Department of Technology (DT) who provide the continuous, ongoing support required for connectivity to the City’s central data systems.

While OpenGov provides proprietary workflow features, it cannot operate in isolation or take full control of permitting; it functions as a single component within a larger ecosystem driven by internal City technical personnel. OpenGov is a tool that helps administer permits, but our staff are the people who make it work.

Local 21 Staff Providing Technical Support

Technical staff are working closely with vendors to integrate City systems and provide basic maintenance and operational support

Project Manager <ul style="list-style-type: none"> 9976 Stephanie Tsai (CPC) 	9976 Technology Expert 1	Inspections Calendaring <ul style="list-style-type: none"> 1044 Raymond Yip (CPC) 1053 Hung Lam (CPC) 1053 Kelvin Nguyen (CPC) 1053 Jensen Pang (CPC) 1043 Jeff Ng (CPC) 	1044 IS Engineer Principal 1043 IS Engineer Senior 1053 IS Business Analyst Senior
Technology Lead <ul style="list-style-type: none"> 9976 Sarah Bindman (ADM) Temporarily assigned to CPC	9976 Technology Expert 1	Payment Processing & Financial Interfaces <ul style="list-style-type: none"> 1824 Mori Wallner (CPC) 	1824 Administrative Analyst Principal
Enablement Lead <ul style="list-style-type: none"> 9976 Darcy Bender (ADM) 5293 Bridget Hicks (ECN) Both work ordered to CPC	9976 Technology Expert 1 5293 Planner IV	Communications <ul style="list-style-type: none"> 9251 Michelle Reynolds (ECN) Assigned to PermitSF	1823 Administrative Analyst
Data & Reporting Strategy <ul style="list-style-type: none"> 1054 Reza Amindarbari (CPC) 1825 Megan Wall-Shui (CPC) 	1054 IS Business Analyst Principal 1825 Principal Administrative Analyst II	Help Desk Support <ul style="list-style-type: none"> 1070 Bruce Yuke (CPC) 1092 Vigeth Tek (CPC) 	1070 IS Project Manager 1092 IT Operations Administrator 2
Data Integrations <ul style="list-style-type: none"> 1042 Dan Tonkovich (ADM) 1043 Matt Smith (ADM) 	1044 IS Engineer 1824 Principal Administrative Analyst	Product Support and Configuration <ul style="list-style-type: none"> 1823 Brian Pettus (CPC) 	1053 IS Business Analyst Senior
GIS & Addressing <ul style="list-style-type: none"> 1054 Sam Valdez (DT) 1051 Teddy Sherbin (CPC) 1054 Mike Wynne (CPC) 	1054 IS Business Analyst Principal 1051 IS Business Analyst Assistant 1054 IS Business Analyst Principal	Infrastructure <ul style="list-style-type: none"> 1044 Chris Siu (CPC) 1043 Kevin Ip (CPC) 	1044 IS Engineer - Principal 1053 IS Business Analyst Senior

Last Name		First Name	Classification	Department	Division	Reports To	OpenGov Time Allocation	Day-to-Day Tech Tasks
1.	Tsai	Stephanie	9976	CPC	PermitSF Team	Liz Watty	100%	<ul style="list-style-type: none"> • Admin access • OpenGov technical product lead/project manager (PM) • Manages scope • Co-manages RAID log with OpenGov PM • Stakeholder management and alignment
2.	Bindman	Sarah	9976	MYR	PermitSF Team	Liz Watty	50% - 100%	<ul style="list-style-type: none"> • Admin access • Technology lead • Collaborates on technical solution design for permit platform • Manages technology integration strategy • Validates feasibility with City staff
3.	Bender	Darcy	9976	ADM	PermitSF Team	Liz Watty	100%	<ul style="list-style-type: none"> • Admin access • Lead current state interviews with City staff to understand processes, challenges, and needs • Configure and maintain workflows, forms, and solutions in OpenGov • Design and document future state processes to improve efficiency and service delivery • Own the continuous improvement cycle by identifying, prioritizing, and implementing enhancements. • Translate business requirements into system configurations and operational solutions • Partner with stakeholders to align technology, processes, and business goals

								<ul style="list-style-type: none"> • Monitor performance and recommend ongoing process and system improvements • Led service design, customer, and user experience •
4.	Hicks	Bridget	5293	ECN	PermitSF Team	Liz Watty	100%	<ul style="list-style-type: none"> • Admin access • Lead current state interviews with City staff to understand processes, challenges, and needs • Configure and maintain workflows, forms, and solutions in OpenGov • Design and document future state processes to improve efficiency and service delivery • Own the continuous improvement cycle by identifying, prioritizing, and implementing enhancements. • Translate business requirements into system configurations and operational solutions • Partner with stakeholders to align technology, processes, and business goals • Monitor performance and recommend ongoing process and system improvements • Obtain alignment with executive leadership between departments, divisions, staff, and customers
5.	Reza	Amindarbari	1054	CPC	Data & Analytics	Rebecca Mayer	10%	<ul style="list-style-type: none"> • OpenGov data strategist

								<ul style="list-style-type: none"> • Develop and implement data collection systems for land use • Design, build, launch and maintain efficient data extraction, transformation and loading processes • Develop and maintain databases, data models and data visualizations including Power BI dashboards, ArcGIS maps and other data products
6.	Wall Shui	Megan	1825	CPC	Data & Analytics	Reza Amindarbari	10%	<ul style="list-style-type: none"> • Previous data performance lead for OpenGov • Develops and maintains performance dashboards and reporting to support staff operational performance monitoring
7.	Smith	Matt	1043	ADM	DataSF	Soumya Kalra	20%	<ul style="list-style-type: none"> • Developed data pipelines between OpenGov and City • Design custom data transformations
8.	Vacant	Vacant	1042	ADM	DataSF	Soumya Kalra	15%	<ul style="list-style-type: none"> • Developed business requirements for Phase 1A • Facilitated data governance for Phase 1A
9.	McLendon	Helen	1044	ADM	DataSF	Soumya Kalra	10%	<ul style="list-style-type: none"> • Data pipeline development to Snowflake • Data strategy • Design custom data transformations
10.	Valdez	Sam	1054	DT	Emerging Tech	Jane Gong	15%	<ul style="list-style-type: none"> • Manages Enterprise Address System for City • Software modifications to support OpenGov • Address transformation to support OpenGov integration
11.	Navarro	Carlos	5380	DT	Emerging Tech	Sam Valdez	10%	<ul style="list-style-type: none"> • Address transformation to support OpenGov integration

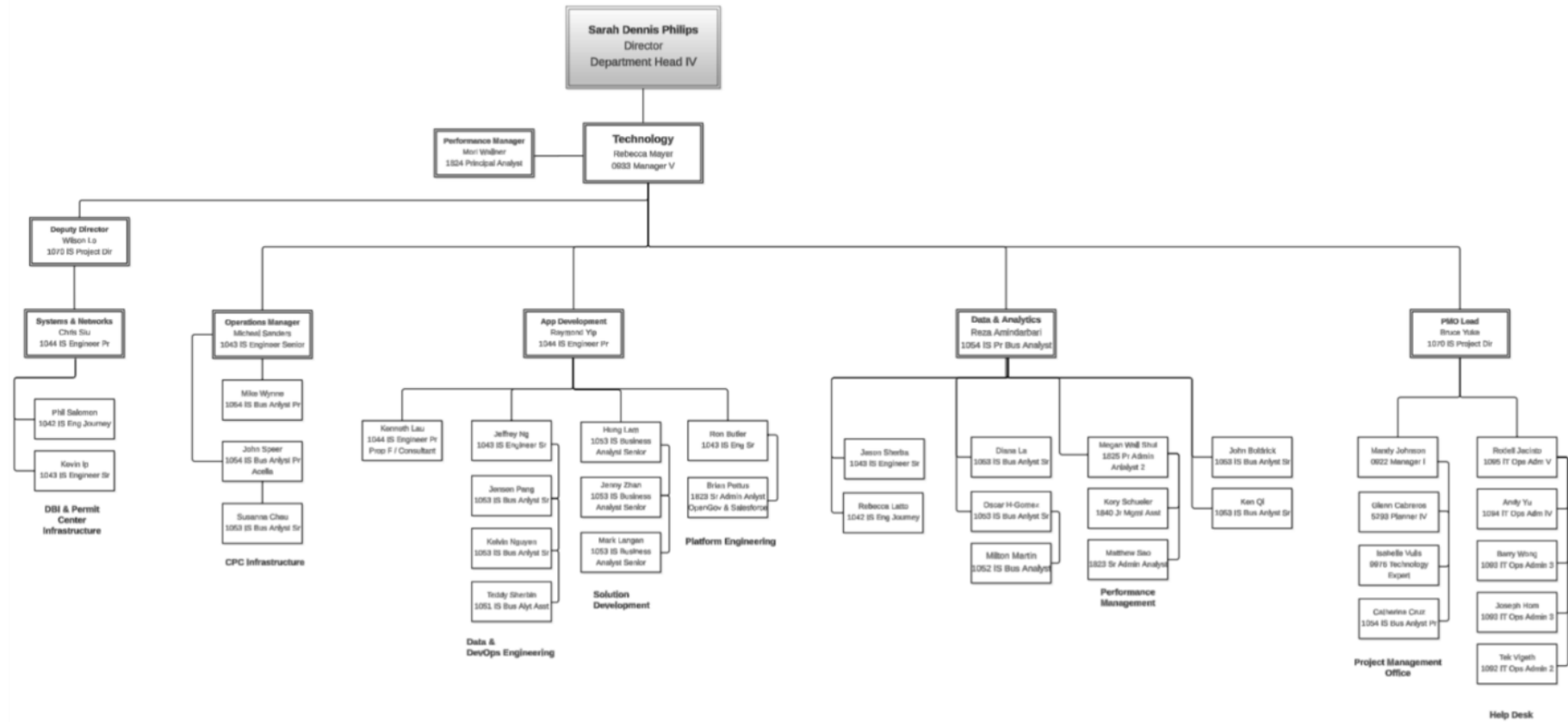
13. Wynne	Mike	1054	CPC	Infrastructure & Network	Micheal Sanders	15%	<ul style="list-style-type: none"> Supported integration of PIM to OpenGov Maintains City's GIS application for properties Responds to new service request Provides backup support for Accela Primary technical support for Arches
14. Sherbin	Theodore	1051	CPC	Products & Solutions	Raymond Yip	20%	<ul style="list-style-type: none"> Addressing support to EAS Team OpenGov to OnBase integration lead (business requirements and project management)
15. Yip	Raymond	933	CPC	Products & Solutions	Rebecca Mayer	10%	<ul style="list-style-type: none"> Plans and analyzes strategic solutions/applications need Performs as web application development SME Performs unit and system testing of developed systems and applications Leads the application help desk in responding to technical issues and change requests
16. Lam	Hung	1053	CPC	Products & Solutions	Raymond Yip	40%	<ul style="list-style-type: none"> Requirement analysis, assessment and design, and testing of OpenGov middleware solutions Performs unit and system testing of developed systems and applications Performs ongoing maintenance and support PTS and Online Permit, Oracle Forms and all other mission critical databases Performs as cloud and on-prem application infrastructure backup

							<ul style="list-style-type: none"> • Performs as primary database administrator • Leads the Data and DevOps team
17. Nguyen	Kelvin	1053	CPC	Products & Solutions	Raymond Yip	25%	<ul style="list-style-type: none"> • Requirement analysis, assessment and design, and testing of OpenGov middleware solutions • Performs unit and system testing of developed systems and applications • Performs ongoing maintenance and support PTS and Online Permit, Oracle Forms and all other mission critical databases • Performs as Oracle 12C migration SME
18. Pang	Jenson	1053	CPC	Products & Solutions	Raymond Yip	25%	<ul style="list-style-type: none"> • Requirement analysis, assessment and design, and testing of OpenGov middleware solutions • Performs unit and system testing of developed systems and applications • Performs ongoing maintenance and support PTS and Online Permit, Oracle Forms and all other mission critical databases • Performs as web application development backup • Performs as Oracle 12C migration SME
19. Ng	Jeffrey	1043	CPC	Products & Solutions	Raymond Yip	15%	<ul style="list-style-type: none"> • Requirement analysis, assessment and design, and testing of OpenGov middleware solutions • Performs unit and system testing of developed systems and applications

							<ul style="list-style-type: none"> • Performs ongoing maintenance and support PTS and Online Permit, Oracle Forms and all other mission critical databases • Performs as a SME for web application support and maintenance • Leads the Solution development team
20. Wallner	Mori	1824	CPC	Admin & Management	Rebecca Mayer	15% - 50%	<ul style="list-style-type: none"> • Supports OpenGov integrations with City payment products • Vendor management for OpenGov integrating software (Bluebeam, EUNA) • FinTech specialist • Performance management lead for Customer Service • Technology procurement specialist
21. Reynolds	Michelle	9251	OSB	PermitSF	Katy Tang	50%	<ul style="list-style-type: none"> • Internal and external communications • Customer engagement • Technical writing • OSB program management (grants, legacy business)
22. Yuke	Bruce	1070	CPC	User Experience	Rebecca Mayer	15%	<ul style="list-style-type: none"> • OpenGov Outlook integration scoping and project management • Manages key Oracle project including new fee schedule and Oracle Forms upgrade • Managing projects associated to Transfer of Function • Managing projects integrating PTS and Oracle
23. Tek	Vigeth	1092	CPC	Desktop Support	Rodell Jacinto	15%	<ul style="list-style-type: none"> • Admin access • OpenGov user account setup

							<ul style="list-style-type: none"> • OpenGov help desk ticket triaging • OpenGov Bluebeam support • Technical support & administration • Hardware & device management • System & software deployment
24. Pettus	Brian	1823	CPC	Products & Solutions	Ron Butler	20%	<ul style="list-style-type: none"> • Admin access • Responds to OpenGov workflow tickets • Supports OpenGov enablement lead with post go-live product support • Manages workflow processes for Permit Salesforce instance • FinTech backup
25. Siu	Chris	1044	CPC	Infrastructure & Network	Rebecca Mayer	5%	<ul style="list-style-type: none"> • Monitors network performance, and responds to infrastructure issues • Developing new network structure to support CPC/DBI merge
26. Ip	Kevin	1043	CPC	Infrastructure & Network	Chris Siu	10%	<ul style="list-style-type: none"> • Monitors network performance, and responds to infrastructure issues • Developing new network structure to support CPC/DBI merge

Current Planning & DBI Joint Technology Division



5. During the Civil Service Commission Meeting on May 18th, 2026, Department leadership provided a slide deck that stated the following:

“Expand staff roles: More City staff will help build the platform and make key decisions by adding a governance role that includes MEA and Local 21 staff to review technical logic, approve data models, and ensure all solutions meet the City’s open-data standards.”

- **How many Local 21-represented positions will be hired to perform this work during the 3-year duration of PSC 6234?**
- **What civil service classifications will be hired during the 3-year duration?**
- **What is the Department’s specific timeline for submitting each RTF and posting each recruitment?**

We request the Department be specific with its projected headcount and hiring timeline, as “more City staff” is not a useful or trackable metric.

A formal staffing plan is currently in development and is not yet ready to share. Staffing levels and roles will be structured to align with the phased rollout of the platform and the launch of additional permit types. We are committed to sharing this information with your body as soon as it is available and are making every good faith effort to be transparent and responsive throughout this process.

6. During the Civil Service Commission Meeting on May 18th, 2026, Department leadership admitted that certain technical functionality will remain with OpenGov going forward. Department leadership indicated that this would “shift” the day-to-day technical work and assignments that our existing City employees perform for CPC and DBI. **Which employees will see their day-to-day work assignments shift? When will this shift of employee assignments take place? What projects and assignments will these positions be responsible for performing now that OpenGov has absorbed a significant portion the Department’s day-to-day technical work?**

The City's goal is to build internal capacity to run and maintain the system independently over the next three years — and OpenGov’s implementation approach is designed to support that. Most of the hands-on work from OpenGov happens early in the project to make sure the platform is built around how the City already operates.

As the project moves forward, City staff will gradually take on more day-to-day responsibilities, including:

- **System configuration and maintenance** — City staff trained on the platform will own configuration updates, workflow modifications, and ongoing system management
- **Business requirements definition** — City staff decide and define how the platform must behave; OpenGov translates those requirements during implementation and equips City staff to take on these tasks directly as the City matures its usage

- **User support and troubleshooting** — City staff will serve as the first line of support for permit applicants and internal users
- **Reporting and data oversight** — City staff own the operational data and reporting functions within the platform

This doesn't happen all at once. Responsibilities shift gradually, tied to each project milestone. Staff won't be handed new duties without proper training and documentation first — hands-on support from OpenGov is built into every phase. Over time, the efficiency gained from using OpenGov are expected to free up staff to focus on more complex work. The following document details staff activities throughout the implementation.

https://sfgov1-my.sharepoint.com/personal/rebecca_villareal-mayer_sfgov_org/Documents/!!OpenGov%20Work/Local%2021%20Prep/Draft%20Responses/Client%20Team%20Structure%20OpenGov.pdf

Client Team Structure & Engagement Model

OpenGov Implementation Methodology

A successful OpenGov deployment depends on coordinated engagement across your organization: the right people, in the right roles, at the right times.

This document describes the client team structure that OpenGov recommends for implementation projects, including each role's responsibilities, estimated level of effort, and how each role participates across the Testing, Training, Readiness, and Launch phases.

The Workstream Model

Each functional area in your organization designates a Workstream Lead who serves as the primary point of contact between your team and the OpenGov implementation team. Workstream Leads are engaged throughout the project leading up to go-live.

What Workstream Leads Do

- Represent business processes and requirements for their functional area
- Validate system configuration against real-world operations
- Support internal team readiness and training delivery
- Drive adoption within their department post-launch
- Serve as the first line of support during and after go-live

Note: *Workstream Leads may also be engaged earlier during Validation and Configuration phases to provide input, review workflows, and ensure alignment with real-world operations.*

Your Project Team: Roles & Responsibilities

The table below outlines each role on the client side, what they do, and what level of time commitment to expect. OpenGov recommends filling all roles before kickoff to avoid delays and ensure clean milestone sign-offs.

Project Sponsor	
Role Description	Oversees high-level progress of the deployment; partners with the OpenGov Project Advisor to resolve escalated items or concerns. Attends steering committee meetings as defined.
Key Responsibilities	<ul style="list-style-type: none"> • Provide executive-level support and organizational authority • Attend steering committee meetings and approve major decisions • Help remove internal blockers and reduce identified risks • Establish and secure strategic priorities for the project • Partner with the OpenGov Project Advisor on escalated concerns

Project Manager / Owner	
Role Description	Primary point of contact for all project operational tasks. Works closely with the OpenGov Project Manager to review project plans, report on status, and obtain approvals.
Key Responsibilities	<ul style="list-style-type: none"> • Serve as the primary point of contact for day-to-day project coordination • Review and approve project plans, schedules, and milestone sign-offs • Manage and coordinate internal project team members • Ensure availability of required resources at each phase • Communicate project status to internal stakeholders • Monitor service delivery and implement strategic plans • Provide escalation and risk support to the Project Sponsor

Business Subject Matter Expert (SME)	
Role Description	Validates and refines the scope of future-state processes; provides the OpenGov team with the direction needed to achieve desired business outcomes. May create test scripts and participate in testing.
Key Responsibilities	<ul style="list-style-type: none"> • Answer business process questions raised by the OpenGov team • Validate and refine future-state workflows and configuration design • Sign off on solution blueprint documentation and scope

	<ul style="list-style-type: none"> • Provide clear internal alignment and decision-making • Participate in validation workshops and configuration reviews • Assist in developing and executing test scripts • Support change management and internal communications
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Solution User / Champion

Role Description	Validates functional scope of future-state processes from an end-user perspective. Partners with Implementation Consultants and Solution Architects to confirm the solution meets day-to-day operational needs.
Key Responsibilities	<ul style="list-style-type: none"> • Validate that configuration matches real-world operational workflows • Execute test scenarios during User Acceptance Testing (UAT) • Identify gaps between configured behavior and expected outcomes • Participate in train-the-trainer sessions and support end-user training delivery • Reinforce new processes within their teams post-launch • Serve as first line of support for their teams during and after go-live • Distinguish between training issues and system issues

Data Subject Matter Expert (SME)

Role Description	Provides functional and technical knowledge to enable data decisions throughout the implementation. Validates data scenarios and ensures data availability in line with business rules and processes.
Key Responsibilities	<ul style="list-style-type: none"> • Validate data scenarios and confirm data availability from source systems • Ensure business rules governing data are established and documented • Support the OpenGov Data Solutions Engineer with data mapping and migration • Respond to data QA questions during the Configure phase • Validate the integrity of migrated data during testing cycles • Confirm that data integration flows match documented specifications

Technical Lead

Role Description	Provides expertise related to your organization's architecture, security, and system infrastructure. Answers technical questions raised by the OpenGov team regarding user provisioning, integrations, or IT processes.
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**Key
Responsibilities**

- Provide technical input on architecture, security, and user provisioning
- Validate technical integration requirements and data infrastructure
- Set up data integration processes within customer environments
- Respond to technical questions raised during configuration and testing
- Ensure system readiness for production cutover
- Support SSO configuration and IT-related prerequisites

Phase-by-Phase Engagement

The four phases below describe how your team engages across the implementation. Each phase builds on the prior one — testing validates configuration, training builds on tested workflows, readiness confirms operational alignment, and launch transitions your team into live operations.

1. Initiate

The Initiate phase establishes the foundation for everything that follows. Your team and the OpenGov Project Manager align on project structure, introduce key stakeholders, confirm resource availability, and agree on the tools, cadences, and timeline that will govern the engagement.

What Your Team Does

- Appoint your Project Sponsor, Project Manager/Owner, and core project team
- Confirm availability of management resources for the steering group
- Participate in the Welcome Call and project kickoff workshop
- Review and prepare current “as-is” business flows and data scope
- Begin internal change management and communications planning
- Review OpenGov documentation and standard data specifications

Workstream Lead Role

- Be identified and introduced to the OpenGov team
- Confirm bandwidth and availability for the project duration
- Begin reviewing relevant business processes in preparation for Validate

Key Deliverables Requiring Your Input

- Confirmed project team roster (sponsor, PM, SMEs, technical lead)
- Signed Project Charter — including success criteria, compelling dates, and UAT exit criteria
- Availability of current business process documentation

Estimated Level of Effort (per week)

- **Project Sponsor:** 2–4 hours (kickoff and charter review)
- **Project Manager / Owner:** 20+ hours/week
- **Business SMEs / Workstream Leads:** 10 hours (introductions and initial scoping)

2. Validate

The Validate phase is where your business processes are translated into documented system design. OpenGov works closely with your team to understand your workflows, map configuration options to your use cases, and produce the Solution Blueprint Document (SBD) – the governing specification for everything built in Configure.

What Your Team Does

- Participate in validation workshops to walk through your current processes and future-state requirements
- Review and provide feedback on configuration options presented by OpenGov
- Confirm data requirements and integration needs with your Data SME and Technical Lead
- Review and sign off on the Solution Blueprint Document – this document locks scope
- Finalize and baseline the project schedule
- Approve the test plan strategy and training plan

Workstream Lead Role

- Serve as the primary business voice during validation workshops for your functional area
- Confirm that proposed workflows and configuration match real operational needs
- Escalate any gaps or conflicts between the proposed design and your business rules
- Provide timely decisions to keep the project moving – ambiguity in this phase creates risk downstream

Key Deliverables Requiring Your Input

- Signed Solution Blueprint Document (scope baseline – changes after this point require a Change Request)
- Validated requirements matrix aligned to the Statement of Work
- Approved test plan strategy and training plan
- Baselined project schedule

Note: *Sign-off on the Solution Blueprint Document is mandatory before Configure begins. This is the most consequential approval in the project – it defines what gets built.*

Estimated Level of Effort per week

- **Project Sponsor:** 2–4 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs / Workstream Leads:** 15–20 hours
- **Data SME:** 10 hours hours
- **Technical Lead:** As needed for integration and SSO requirements

3. Configure

In the Configure phase, OpenGov builds and tests the solution against the approved Solution Blueprint. Your team's role shifts toward data preparation, providing QA responses, and identifying the right people for UAT and training.

What Your Team Does

- Provide master data and data migration inputs as requested by the OpenGov Data Solutions Engineer
- Respond promptly to data QA questions to keep integration work on track
- Set up data integration processes within your own systems where required
- Participate in an end-to-end demo of the configured solution with the OpenGov team
- Identify and confirm the team members who will participate in UAT and Training
- Begin preparing internal test scenarios based on your real business cases

Workstream Lead Role

- Review configuration checkpoints as they are presented by OpenGov
- Flag any discrepancies between the configured system and your approved design
- Confirm your team's readiness and availability for the upcoming Test phase

Key Deliverables Requiring Your Input

- Data migration QA responses
- Confirmation of UAT and training participants

Estimated Level of Effort

- **Project Sponsor:** 1-2 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs:** 10-15 hours
- **Data SME:** 2-4 hours
- **Technical Lead:** as needed

5. Training

Preparation of end users to confidently and effectively use the system on day one. Training materials are based on tested, real workflows.

What Your Team Does

- Participate in train-the-trainer sessions
- Validate training materials against actual workflows
- Deliver or support internal team training
- Identify and address knowledge gaps

Workstream Lead Role

- Act as subject matter experts during training delivery
- Translate system functionality into day-to-day operations language
- Reinforce new processes within their teams

Going Into This Phase

- Core workflows and SOPs have been validated through testing
- Workstream Leads have hands-on familiarity with the system
- Training materials are developed from tested, real workflows

Estimated Level of Effort

- **Project Sponsor:** 1-2 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs:** 10 hours
- **Data SME:** as needed
- **Technical Lead:** as needed

6. Readiness (Pre-Go-Live Preparation)

Final alignment of people, processes, and system configuration to ensure a smooth transition to production.

What Your Team Does

- Confirm staff roles, responsibilities, and workflow ownership
- Finalize SOPs and internal job aids
- Validate reports, dashboards, and operational processes
- Prepare for go-live: cutover planning, communications, support model

Workstream Lead Role

- Ensure their team is operationally ready
- Communicate expectations and process changes to their department
- Identify and resolve any remaining gaps before launch

Going Into This Phase

- Users have been trained on validated workflows
- SOPs reflect finalized system behavior
- Remaining gaps from testing and training have been addressed or prioritized

Estimated Level of Effort

- **Project Sponsor:** 1-2 hours
- **Project Manager / Owner:** 10 hours
- **Business SMEs:** 6-10 hours
- **Data SME:** as needed
- **Technical Lead:** as needed

7. Launch (Go-Live & Hypercare)

Transition to live system usage with structured support to ensure adoption and stability. The Hypercare period provides elevated support while your team builds confidence in the new system.

What Your Team Does

- Provide day-one support to end users
- Triage issues and escalate as needed to OpenGov
- Reinforce adoption of new workflows and prevent fallback to legacy processes
- Gather feedback for continuous improvement

Workstream Lead Role

- Serve as first line of support for their teams
- Distinguish between training issues and system issues
- Drive consistent usage and prevent reversion to legacy processes

Going Into This Phase

- Teams are trained and aligned on new processes
- Operational readiness is confirmed across workstreams
- Support structure and escalation paths are clearly defined

Estimated Level of Effort

- **Project Sponsor:** 5-10 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs:** 20+ hours
- **Data SME:** 10 hours
- **Technical Lead:** 5-10 hours

Responsibility Summary (RACI)

The table below summarizes how each client role is engaged across key project activities. RACI stands for: Responsible (does the work), Accountable (owns the outcome), Consulted (provides input), Informed (kept up to date).

Phase	Key Activity / Deliverable	Project Sponsor	Project Manager	Business SME	Solution User / Champion	Data SME	Technical Lead
Initiate	Appoint sponsor & project team	A	R	I	I	I	I
Initiate	Coordinate customer team ramp-up	I	C	A	C	C	C
Initiate	Review current "as-is" business flows	I	C	R/A	C	C	C
Validate	Validate solution design & sign-off	I	A	R	C	C	C
Validate	Change management transitions	I	C	A	C	C	C
Validate	Test plan strategy sign-off	I	A	R	C	C	C
Configure	Data integration QA responses	I	C	C	C	R/A	C
Configure	Identify resources for UAT & Training	I	A	R	C	C	C
Train	User Acceptance Testing	I	A	C	R	C	C
Train	Business Readiness Checkpoint	C	A	R	C	C	C
Launch	Go-Live sign-off (M5)	A	C	C	C	C	C
Launch	Evaluate success of deployment	A	C	R	C	C	C

Governance Model

OpenGov's governance model structures project oversight into four levels, providing the right support, perspective, and decision-making authority at each tier of your organization.

Level	Name	Who	Focus	Cadence
4	Strategic	Executive Project Sponsors	Establish & secure strategic priorities	Quarterly
3	Stakeholders	Project Sponsors, Regional Directors	Approve business solution & technical approaches	Monthly / Bi-weekly
2	Management	Project Manager / Owner	Monitor service delivery, risk, budget, timeline	At least weekly

1	Operational	Business SMEs, Solution Users, Data & Technical Leads	Execute project tasks; accountable to Project Manager	Daily
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Each level has a defined meeting cadence designed to keep the project progressing with the right visibility at the right altitude – from daily operational execution to quarterly strategic alignment.

Quick Reference: Who to Involve When

Project Phase	Primary Roles to Engage
Initiate	Project Sponsor · Project Manager / Owner · Business SMEs
Validate	Project Manager / Owner · Business SMEs · Technical Lead (as needed)
Configure	Business SMEs · Data SME · Technical Lead
Test (UAT)	Solution Users / Champions · Business SMEs · Data SME
Train	Solution Users / Champions · Business SMEs
Readiness	Project Manager / Owner · All Workstream Leads
Launch	All Roles · Workstream Leads as first-line support
Hypercare	Project Manager / Owner · Solution Users / Champions

7. What is the specific process for the Department to define PermitSF business requirements and translate them into configuration?

PermitSF Enablement Leads employ a structured implementation methodology to define business requirements and translate them into system configurations, applied consistently across all customer engagements. For each permit type, this process unfolds as follows:

- **Discovery and Requirements Gathering:** The project team meets with subject matter experts to understand how a specific permit type should work. These discussions help capture the needs of applicants, staff processes, required data, payments, and fees. Multiple sessions may be needed to document the full set of requirements. Critically, this is when business processes are re-imagined. Does the current process work for customers? Should we change our business process now that we have different technologies available? How could we do things better? These questions are iterative in nature, require expertise from permitting staff, and strategic leadership to re-imagine how permitting could be done differently to better serve our customers, be responsive to City staff feedback, and adapt to a changing regulatory environment. Some business processes need no re-engineering; some need dramatic rethinking. This effects timeline.
- **Configuration Design:** Using the information gathered, the team creates a proposed design for how the permit should function in the system. This design is reviewed with City front line staff, subject matter experts, and department leaders to confirm accuracy and alignment before any system building begins.
- **Iterative Build and Review:** The team builds the permit in OpenGov in a series of small cycles. After each cycle, they review the draft with stakeholders to gather feedback and make improvements.
- **User Acceptance Testing (UAT):** Once the draft is complete, it undergoes formal testing by a group of City front line staff, subject matter experts, and department leaders. They verify that the permit works correctly and meets all requirements. Any issues that arise are resolved by the configuration team.
- **Launch:** After successful testing and issue resolution, the permit is released for public use.
- **Post Launch Support and Change Management:** If questions, issues, or new configuration needs come up after launch, they are reviewed through a structured request process. The configuration team works with City front line staff, subject matter experts, and department leaders to validate whether requested changes are indeed needed and make any necessary updates.

OpenGov works hand in hand with City staff at each stage of this process including members of the enablement team and subject matter experts within each division. This approach ensures the platform accurately reflects changes to internal business workflows.

8. What is the Department's process for validating that a permit workflow is functioning as expected?

The Department uses a step-by-step process to make sure workflows function correctly before they go live. This includes ongoing, informal testing during build and a formal round of User Acceptance Testing (UAT) with staff at all levels from across the departments. The following is a breakdown of our testing process:

Workflow Validation Process

1. Iterative Build Testing

- Configuration team and OpenGov test record types as they're built.
- Configuration team shares early drafts with key stakeholders for feedback.
- Identify and fix issues in real time before formal testing.

2. Formal UAT Preparation

- Assemble cross-functional testers: OpenGov, config team, SMEs, department leaders.
- Confirm test scenarios for both customer portal and staff portal.

3. Execute UAT

- Testers walk through full workflows end-to-end.
- Document issues.

4. Track & Triage Findings

- Log all issues in the consolidated UAT feedback tracker.
- Capture: issue description, operational impact, department response, and resolution status.

5. Resolve Issues

- Route findings to the correct pathway:
 - Configuration fixes
 - SOP development
 - Policy decisions (department leadership)
 - Implementation team follow up

6. Finalize & Approve

- Confirm all critical issues are resolved.
- Validate that workflows function correctly before go-live.

7. Post Go Live

- Use feedback from staff and customer escalation channels to find opportunities for improvements and identify bugs
- Coordinate with OpenGov to fix bugs
- Maintain a backlog of issues and improvements with weekly prioritization, configuration, and releases

9. How is the Department reviewing and addressing legal and compliance obligations currently coded into existing systems?

Building and Planning are regulatory agencies: ensuring compliance with regulations is of utmost importance to us. The legacy system was identified by the Controller's Office as having risk shortcomings that needed reinforcement through bespoke enhancements to ensure fraudulent behaviors of the past could not persist. The new system will achieve those same goals, and in many instances, will enhance our ability to better meet our legal and compliance obligations.

We approached designing this new system with the commitment of meeting all legal and compliance requirements and providing transparency to the public. Given the dynamic nature of the new system, we saw this as an opportunity to build in new features to better meet our legal and compliance obligations. Legal and compliance obligations that previously required one-off bespoke enhancements can now be addressed by features

that the City can dynamically build into the new platform. These features are being developed in coordination with City employees with expertise in legal issues and compliance management. Department leadership has also engaged the City's Controller's office to ensure that new compliance tactics, at the very least, achieve the same goals that their report originally sought to solve. We believe all legal and compliance requirements are being met and that the new system will prove to be more safe, secure, and transparent than the current system. These are not static needs, and we expect that the City's needs, and the system's requirements, will continue to evolve over time, which is why we are building up the muscle for City staff to dynamically work with the platform to design what is needed as time goes on.

10. Please list the specific Planning Department positions (including first name, last name, and classification number) that are currently involved in configuring and testing permit workflows.

PermitSF and the Planning Department utilize a cross-functional project team to ensure both technical system architecture and operational business logic are correctly aligned, and work in an iterative manner during configuration and testing.

*Indicates City employees reassigned to the Planning Department for this project.

Classification Number	Classification Title	First Name	Last Name	Project Role / Focus Area
9976	Technology Expert I	Stephanie	Tsai	Requirements Design, Configuration, Testing
9976*	Technology Expert 1	Darcy	Bender	Requirements Design, Configuration, Testing
9976*	Technology Expert 1	Sarah	Bindman	Requirements Design, Configuration, Testing
5293*	Planner IV	Bridget	Hicks	Requirements Design, Configuration, Testing
0933	Manager V	Rebecca	Mayer	Requirements Design, Testing, Finance Integration
1824	Principal Administrative Analyst	Mori	Wallner	Requirements Design, Testing, Finance Integration, Workflow
1823	Senior Administrative Analyst	Brian	Pettus	Configuration, Testing
1043	IS Engineer-Senior	Raymond	Yip	Requirement Analysis, Assessment and Design, Testing

1053	IS Business Analyst - Senior	Hung	Lam	Architecture, development, and integration of the custom middleware scheduling solution bridging OpenGov, Outlook Calendaring, and legacy City systems.
1053	IS Business Analyst - Senior	Jeff	Ng	Architecture, development, and integration of the custom middleware scheduling solution bridging OpenGov, Outlook Calendaring, and legacy City systems
1053	IS Business Analyst - Senior	Jensen	Pang	Requirement Analysis, Assessment and Design, Testing
1053	IS Business Analyst - Senior	Kelvin	Nguyen	Requirement Analysis, Assessment and Design, Testing
1044	IS Engineer-Principal	Chris	Siu	Network Access and Security, Testing
0931	Manager III	Rich	Sucre	Requirements Design, Test and Train manager, User Acceptance Testing
5293	Planner IV	Xinyu	Liang	Requirements Design, Configuration, User Acceptance Testing
5293	Planner IV	Natalia	Fossi	Requirements Design, User Acceptance Testing
5293	Planner IV	Kelly	Wong	User Acceptance Testing
5291	Planner III	Kalyani	Agnihotri	Requirements Design, SOP development User Acceptance Testing
5291	Planner III	Dakota	Spycher	User Acceptance Testing
5278	Planner II	Kathryn	Yi	SOP development, User Acceptance Testing
5278	Planner II	Wesley	Wong	User Acceptance Testing

5278	Planner II	Maggie	Dong	User Acceptance Testing
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11. How do staff file or report bugs with OpenGov?

- a. How many bugs have been reported by CCSF staff between October 2025 to date? Please include a breakdown of bugs/incidents reported by Department, including the specific resolution provided, and the turnaround time for each incident's resolution.

City staff report issues through the designated staff escalation path, which outlines how issues are submitted, triaged, and routed based on severity. Staff may also escalate directly through their designated OpenGov team contact for time-sensitive matters.

It's worth noting that many reported issues turn out to be questions about business process changes, configuration preferences, or expected platform behavior, rather than true system bugs. These are critical items to track but are differentiated from software "bugs". System uptime, which users sometimes experience as a bug, can be monitored in real time via the [OpenGov Status Page](#).

Since launching the first permits in February there have been 14 reports of bugs impacting staff or applicants. Resolution time varied based on the nature of the issue and the priority based on impact.

The following is the City's escalation procedure that has been distributed to staff using the PermitSF Portal.

OpenGov Launch Staff Support Escalation Plan

Overview

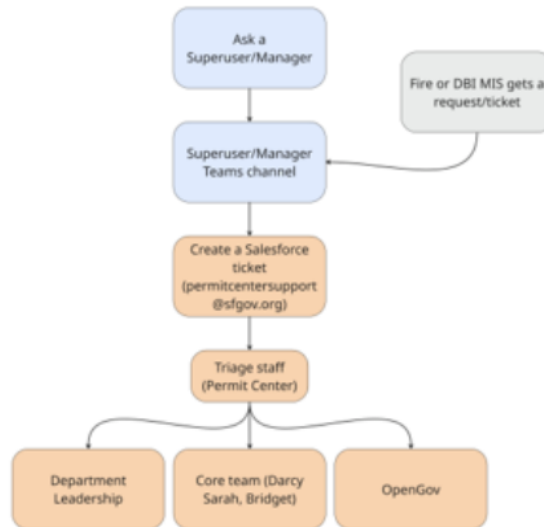
This document outlines the support escalation process for staff during the launch of our new permitting system. The goal is to provide quick, effective assistance to front-line staff while managing workload for Super Users and support teams.

Order of Escalation

Follow these steps in order when you need assistance:

1. Ask a Supervisor, Manager, or Super User (depending on your team's workflow)
2. Your Supervisor, Manager, or Super User will submit a Salesforce ticket on your behalf if needed

Important: Only Super Users, Supervisors, and Managers should submit tickets to Salesforce. Front-line staff should work through their Super User or Supervisor to escalate issues.



Support Channels

Microsoft Teams Channel (Super User Peer Support)

Purpose: Peer support channel for Super Users to collaborate, share solutions, and quickly resolve questions with each other during the launch period.

Channel Members:

- Super Users
- Supervisors and Managers
- Core Team members (as needed)
- Fire and DBI MIS staff
- Additional staff may be added as needed based on support requirements

How It Works:

- Super Users can post questions they encounter while supporting staff
- Other Super Users and supervisors monitor and respond to help resolve issues quickly
- Fire and DBI MIS staff can submit requests they receive through their channels
- Core Team will post known issues, FAQs, and important updates to keep Super Users informed
- This channel keeps noise manageable while ensuring Super Users have fast access to peer support
- Only [superusers](#) should post directly to this channel

Best practices:

- Start with the process or team name - Uses your exact examples (Intake, Fire inspections, Planning)
- Tag specific people when you need their [expertise](#) - @mentions for direct attention
- Search before posting - Reduces duplicate questions
- Mark issues as resolved - Helps others see what's been answered
- Include key details upfront - Permit numbers, error messages, context; include screenshots when available

Response Goal (Launch Period: February 13-27):

- Acknowledgement within 30 minutes when possible
- Collaborative problem-solving to resolve or escalate to Salesforce within 60 minutes

Workload Impact for Super Users:

- Monitoring this peer support channel will require 1-2 hours during the first few weeks as Super Users work together to build expertise

Note: As patterns and common issues emerge, the Core Team will compile FAQs and known issues into a reference document. During the launch period, this information will be shared [in](#) the Teams channel for quick access.

Salesforce Ticketing System

Purpose: Track and resolve issues that require more time, research, or specialized expertise.

Who Can Submit Tickets:

- Super Users
- Supervisors and Managers
- Fire and DBI MIS staff
- Front-line staff should work through their Super User or Supervisor to submit tickets

How to Submit a Ticket:

Email your issue to: permitcentersupport@sfgov.org

Your email will automatically create a ticket [in](#) the Permit Center Support channel.

Ticket Workflow:

1. **Triage:** Permit Center Team receives and reviews the ticket
2. **Initial Resolution Attempt:** Team attempts to resolve using Standard Operating Procedures (SOPs)
3. **Assignment:** If not immediately resolved, ticket is assigned via one of three options:

Option 1: [Assign to](#) designated Salesforce agents (Darcy, Sarah, Bridget) to resolve within the product

Option 2: Forward to appropriate department leadership for business process issues

- DBI: Mary Wilkinson-Church, David Kane
- SFFD:
- Planning
- OSB

Option 3: Escalate to [OpenGov](#) (vendor) for product defects or technical issues that cannot be resolved internally

Licensed Salesforce Users:

- Most Super Users do not have Salesforce access
- [Darcy Sarah](#) and Bridget will be added to Salesforce and will escalate issues assigned to [OpenGov](#)

Ticket Tracking:

- Tickets will be exported to a shared spreadsheet or tracker
- Staff can view ticket status and information through this shared tracker

Service Level Agreement:

- Response within 1 business day
- Many tickets will be resolved faster based on complexity

Workload Impact:

- Approximately 2-3 hours per day for research, responses, and tracker maintenance

- Permit Center Team (customer service and IT) will staff the triage queue until additional resources can be assigned.

Note: The Permit Center Salesforce Org is being migrated into a new Salesforce space the week of 2/2. The PermitSF Salesforce workflow will be ready to launch on 2/9 after the org migration.

Ticket Tracking System

Purpose: Provide transparency and visibility into support tickets for staff and Super Users.

What You'll See:

- Ticket status updates (delay will depend on integration or manual set up)
- Ticket details including issue description, assigned resolver, and current status
- Submission and resolution dates
- Ability to filter and search tickets by department, status, or issue type

Benefits:

- Check your ticket status without sending follow-up emails
- See if your issue is already reported (reduces duplicate tickets)

Access: Details on how to access the ticket tracker will be shared during the launch period.

OpenGov On-Site Support (February 9-27)

During the soft launch and go-live period, OpenGov staff will be on-site to provide direct support. Understanding how they're deployed will help you know where to direct questions.

Where to Find OpenGov Staff

Permit Center Floor:

- OpenGov staff will be available to help customers and Permit Center staff with account creation and permit submission
- They can provide general guidance on permits from initiation through submission

49 South Van Ness Office:

- OpenGov staff will be embedded with Core Team and supervisors
- They focus on configuration questions, product questions, and technical support
- They work closely with staff performing business processes in OpenGov

Office Hour Sessions for Super Users

OpenGov is offering dedicated office hours for Super Users to ask questions and get expert guidance. These are optional but highly recommended for Super Users who want deeper product knowledge.

- Monday-Friday: 10:00-11:00 AM and 2:30-3:30 PM
- Location: 49 South Van Ness (conference room or open workspace)

Daily Coordination (Core Team Only)

The Core Team will participate in daily coordination meetings with OpenGov to ensure alignment, surface issues early, and adjust support as needed. Super Users and front-line staff do not need to attend these meetings—the Core Team will communicate important updates through the Teams channel.

Morning Standup:

- Monday: 8:30-8:45 AM | Tuesday-Friday: 7:30-7:45 AM
- Purpose: Share known issues, confirm focus permits, align on messaging

Midday Checkpoint:

- Daily at 1:00 PM
- Purpose: Share morning observations, identify emerging issues, adjust afternoon focus

End-of-Day Close (Core Team + Dept Leadership):

- Daily: 4:00-4:45 PM
- Purpose: Capture key issues, confirm escalations, make decisions as needed, prepare for next day

Roles and Responsibilities

Role	Responsibilities
Front-Line Staff	<ul style="list-style-type: none"> • Follow escalation order when encountering issues • Work with Super User or Supervisor to escalate complex issues • Document issue details to help with ticket submission • Provide feedback on system improvements
Supervisors/Managers	<ul style="list-style-type: none"> • First point of contact for staff questions • Monitor Teams peer support channel • Submit Salesforce tickets for complex issues on behalf of staff • Escalate to Super Users or Salesforce as needed
Super Users	<ul style="list-style-type: none"> • Provide direct support to staff in their department • Use Teams peer support channel to collaborate with other Super Users • Submit Salesforce tickets for issues requiring escalation • Respond to department-specific Salesforce tickets when assigned

	<ul style="list-style-type: none"> • Share solutions and learnings with peer Super Users
Fire and DBI MIS Staff	<ul style="list-style-type: none"> • Monitor their department channels for support requests • Submit requests/tickets received through Fire or DBI channels to Teams or Salesforce
Permit Center Team (Triage)	<ul style="list-style-type: none"> • Receive and triage all Salesforce tickets • Attempt resolution using SOPs • Route tickets to appropriate resolver (Salesforce agents, Super Users, or vendor) • Escalate product defects and technical issues to <u>OpenGov</u> • Maintain shared ticket tracker
Core Team (Darcy, Sarah, Bridget)	<ul style="list-style-type: none"> • Resolve tickets assigned to Salesforce agents • Handle complex product-related issues • Work within 1 business day SLA
Department Leadership	<ul style="list-style-type: none"> • Resolve escalated tickets specific to department operations • Provide guidance on department-specific processes
<u>OpenGov</u>	<ul style="list-style-type: none"> • Resolve escalated tickets related to system functionality • Provide technical support for product issues

Success Metrics

We will measure the effectiveness of this support plan through:

Response times: Percentage of questions acknowledged within 60 minutes (Teams)

Resolution times: Percentage of tickets resolved within 1 business day

- **Ticket volume:** Tracking trends to identify common issues and training needs
- **Staff satisfaction:** Feedback on support quality and accessibility (TBD based on capacity to survey staff)

Important Dates

Launch Period: February 13-27, 2026

During this critical two-week period, Teams channel SLAs will be actively monitored to ensure staff receive immediate support.

Questions?

If you have questions about this support plan, please contact your supervisor or manager.

12. Describe in detail how our in-house civil service classifications will be involved in planning, designing, configuring, maintaining, and auditing OpenGov during the 3-year contract duration outlined in PSC 6234?

The City's overarching strategy for the three-year contract duration focuses on leveraging, training, and expanding the capabilities of our internal civil service workforce. As detailed in the City's response to Union Question 1 (Transition Plan Matrix), the operational relationship with the vendor shifts systematically from side-by-side mentorship to complete internal mastery by Year 3.

To ensure clear operational accountability and career trajectory protection, the involvement of in-house civil service classifications—including staff detailed in the earlier organizational chart which includes, **1070, 1044, 1043, 1054, 1053, 1824, 1823, and related Citywide service providers from** DataSF, Digital Services, and Department of Technology, is broken down by core functional lifecycle disciplines below:

Planning & Designing

Throughout the three-year lifecycle, City IT and Administrative Analyst classifications serve as the structural architects of the platform's footprint.

Year 1: Civil service personnel partner with vendor architects to translate departmental permitting logic and business process maps into functional design blueprints.

Years 2 & 3: Internal staff assume sole authority for planning future expansion phases, designing system architectures for oncoming departments (such as DPW or PUC), and designing custom, proprietary middleware integrations without vendor reliance.

Configuring

Core system configuration is handled via a structured handoff model to guarantee complete civil service platform administration.

Year 1: Internal technical staff work side-by-side with the vendor to map system logic, configure user role hierarchies, and establish core workflow rules.

Year 2 (Co-Delivery): City IT and Administrative Analyst classifications take the primary role in executing standard workflow adjustments, modifying routing maps, and developing custom middleware scheduling tools (e.g., bridging OpenGov to Microsoft Outlook and legacy infrastructure databases).

Year 3 (Full Autonomy): 100% of platform configuration, software modifications, and application environment styling are executed exclusively by City staff.

Maintaining & Auditing

System stability, data security, and platform governance remain entirely within civil service custody to safeguard enterprise integrity.

Operational Maintenance: In-house technical personnel utilize isolated sandbox environments to prototype, test, and safely promote configuration adjustments to the live database, managing all internal change control protocols natively.

Platform Governance & Auditing: Designated civil service administrators use built-in system governance tools, platform audit trails, and the Activity Log API to track data access, monitor configuration alterations, and perform regular security audits. This ensures complete system transparency and protects data boundaries across all participating City departments.

13. What is the Department's strategy to address legal changes to workflows that require modification to the OpenGov system? Please describe what tasks would be the responsibility of the vendor and which tasks would be the responsibility of in-house City staff.

Both the Planning Department and the Department of Building Inspection (DBI) maintain dedicated legislative analysts who continuously monitor changes to federal, state, and local codes. These internal staff members are directly involved in the development, review, modification, and implementation of municipal ordinances.

The City entirely drives, owns, and mandates any changes required within City systems to accommodate legislative updates. Like other City technology projects, we intend to leverage the expertise of both the vendor and our staff to identify and develop these system revisions.

14. Have OpenGov consultants authored, or have they been directed to author, a white paper on San Francisco's permitting processes? If so, Local 21 requests a copy of this white paper. Additionally, please clarify and explain why this research and reporting work was not included in the description of the professional services to be performed under PSC 6234 and/or PSC 5585, as this is work that's routinely performed by civil service classifications represented by IFPTE Local 21.

The City did not direct, commission, or expend professional service hours for a custom research paper on local permitting practices. However, as part of its standard software implementation onboarding, the vendor shared a complimentary, high-level industry overview titled "OpenGov Standard Inspection Recommendations." A copy of this document is attached.

This document was provided at no cost to the City. Because no City funds were expended and no billable consultant hours were utilized to draft this document, it was not included in the professional services scope of work under PSC 5585.

The document shares general industry trends and how the basic, out-of-the-box OpenGov software works. It does not do the actual hands-on work of analyzing, setting up, or running San Francisco's specific permitting systems. That local, day-to-day technical work belongs to, and will continue to be done by, the City's own civil service employees represented by Local 21.

https://sfgov1-my.sharepoint.com/personal/rebecca_villareal-mayer_sfgov_org/Documents/!!OpenGov%20Work/Local%2021%20Prep/Draft%20Responses/OpenGov%20Standard%20Inspection%20Recommendations.pdf

15. During the RFI process for PermitSF, did the Mayor's Office of Innovation request that OpenGov build "backdoors" into the system to allow City leadership to override agency permitting determinations? Did OpenGov agree to provide this functionality?

No. The Mayor's Office of Innovation did not request, and OpenGov has not built, any features or system "backdoors" that allow City leadership to override or overturn agency permitting determinations.

16. During the Civil Service Commission Meeting on May 18th, Liz Watty mentioned that OpenGov has a certification program. Please describe what the OpenGov certification program entails, the timeline for in-house City staff to receive OpenGov certification, and which City staff will receive this certification.

The formal program details and curriculum overviews covering platform administration, core configuration, and systemic operational use are attached.

While formal certification courses are typically hosted at OpenGov's annual user conference, the City is actively working with OpenGov to deliver the training in San Francisco before the end of the current calendar year. To maximize training efficiency, the formal certification sessions will be scheduled following the official kickoff of new department onboarding projects anticipated in late Fall.

The certification program will be delivered to designated IT and Analyst classifications responsible for system architecture and platform administration across participating City departments.

To ensure continuous professional development, all City personnel have ongoing access to OpenGov University, a comprehensive, self-paced online training platform. Furthermore, administrative training was directly embedded into the initial implementation phases for the core City technology team, in addition to full access and encouragement to attend OpenGov University courses. These individuals currently serve as internal Subject Matter Experts (SMEs), providing peer-to-peer technical mentorship and configuration support across departments to maintain team capabilities ahead of the formalized certification delivery.

https://sfgov1-my.sharepoint.com/personal/rebecca_villareal-mayer_sfgov_org/Documents/!!OpenGov%20Work/Local%2021%20Prep/Draft%20Responses/Permitting%20and%20Licensing%20Administrative%20Certification_2026.pdf

City-owned Configuration.

OpenGov Admin Certification — what city staff learn to own

The certification is a structured, two-level program built for one outcome: **city staff who configure, manage, and evolve their own permitting environment without OpenGov dependency.** Every skill below is one PermitSF controls.

WHAT PERMITSF STAFF WILL DO THEMSELVES

System configuration & access control

"Who sets up users and controls who can see what?"

- Configure org settings, departments, and date/time
- Set up and update public portal branding, theme, search settings, and project display
- Add, edit, and remove user accounts; set and modify access levels
- Create and manage user groups; assign group-based permissions
- Enterprise Access Control (EAC): granular role-level permissions
- Test Mode: safely validate any config change before it goes live

Record types, forms & fees

"Who builds and changes our permit and license forms?"

- Access, navigate, and manage all record types
- Add new form fields, re-order existing ones
- Configure conditional logic: show/hide fields based on applicant input
- Build multi-entry form sections (subcontractor lists, fixture counts, etc.)
- Set up and maintain fee schedules and rate-based calculations
- Configure partial refunds, fee waivers, and ledger reconciliation
- Build and maintain a Rate Library for reusable fees across record types
- Link related records across departments (e.g. planning approvals to building permits)
- Configure Plan Review workflows and connect to permit records
- Build document templates: merge tags, error handling, formatting and layout
- Embed images, signatures, and barcodes in templates
- Connect documents to specific workflow steps

Inspections, renewals & workflows

"Who manages day-to-day operations when things change?"

- Create and configure inspection types and schedule settings
- Manage the inspect tab: assign, complete, and step through inspections
- Handle concurrent inspection workloads across staff
- Manage coverage when staff are absent — reassign without vendor help
- Configure Smart Inspections: routing and schedule optimization

- Set up mobile app access and configuration for field inspectors
- Build renewal workflows with conditional form logic
- Set up automated renewal campaigns and notification schedules
- Configure Communication Center: message templates and applicant notification triggers
- Auto-assign workflow steps based on group workload
- Configure inspection results to trigger record expiration date changes

Reporting & data

"Who pulls the numbers when leadership asks?"

- Build, customize, and save in-app reports
- Track open records, pending approvals, and inspection status
- Run GL reports and perform payment reconciliation
- Configure Department Form Fields to standardize data across record types
- Use smart templates and searchable record types on the public portal

HOW DEEP THE LEARNING GOES

AWARENESS

Know what's there and why

Staff understand what each feature does, where it lives, and how it connects to their daily work.

SF example: A DBI inspector knows Smart Inspections exists and what routing optimization means for their workload.

COMPETENCY

Configure it without asking

Staff build, change, and troubleshoot configurations independently. Validated through hands-on exercises.

SF example: A DPW admin adds a conditional fee field, tests it in Test Mode, and pushes it live — no ticket filed.

MASTERY

Lead it across departments

Staff train colleagues, diagnose issues, and drive adoption across a fragmented multi-department environment.

SF example: A PermitSF champion walks Planning and DBI through linking their records — without OpenGov in the room.

WHERE PERMITSF LANDS — AND WHERE IT GOES FROM HERE

L1 Initial	L2 Managed	L3 Defined	L4 City-led strategy	L5 SF-optimized
Record types live, basic workflows, payments enabled	Auto-assigned workflows, conditional fields, mobile inspections, renewals	Complex fees, multi-entry forms, GIS triggers, standardized reporting	SF-defined workflows, location triggers, API-driven data to city systems	Self-service portal, citizen satisfaction tracking, continuous improvement
Blue = directly taught in certification				Green = SF reaches independently after cert

WHAT PERMITSF OWNS AFTER THIS — NO VENDOR TICKET REQUIRED

Any user, group, or permission change

New hire onboarding, departures, access adjustments, group restructuring — done by city admins, same day.

Inspection and renewal operations

Coverage gaps, schedule changes, new inspection types, renewal campaigns — managed by the department that owns the work.

Form and fee updates on any record type

New field, new condition, fee change, document template update — city staff make it, test it, push it live.

Reports when leadership asks

Build, save, and run in-app reports on open permits, inspection status, payments, and cross-department activity — no data request needed.

OpenGov provides enablement and training on new features through Expert Services.

WHAT OPENGOV MANAGES AFTER THIS — REQUIRED VENDOR TICKET

BACK-END INTEGRATIONS

Finance export updates, most MAT changes, creating/updating Location Flags, and Autofill Integrations, including the scheduled run time of these integrations.

AUTOMATIC WORKFLOW LOGIC

Changes to Validated Review, Ownership Info Population, First Year Free, and Automated Intake Review processes.

SUPER USER ACCESS

Template store, edit/delete inspection results, Restore deleted record types/departments

EXPANDED COMPLIANCE CONTROL **

Names added, removed, or modified from the ECC list that is used in the Validate Review Logic and the Automated Intake Review process.

***The current SLA for updates is 4 business hours from receipt of request. The City will have full control and ownership to maintain the ECC list once productized in 3 months.*

17. What are the product enhancements that OpenGov engineering staff have made or will be making at San Francisco's request since the RFI?

Since the initial Request for Information (RFI), the City has collaborated with OpenGov's engineering team to deliver target-built platform enhancements designed to accommodate San Francisco's complex enterprise scale, data policies, and field operational structures. Rather than relying on generic, out-of-the-box configurations, these enhancements actively support City staff by automating administrative overhead, ensuring fiscal precision, and optimizing complex resource allocation.

These delivered enhancements are categorized below by their operational outcomes:

Core Platform Administration & Secure Governance

- **Enhanced Role-Based Permissions:**
 - Establishes granular data access boundaries, ensuring that staff have clear, role-appropriate system permissions to protect operational security and departmental workflows.
- **Activity Log API:**
 - Provides internal technical teams with native capabilities to extract, audit, and track platform modifications, maintaining a transparent administrative history of all system activities.
- **Sandbox Promotion Environments:**
 - Allows City IT professionals to isolate, build, and thoroughly test configuration modifications in an isolated staging environment before deploying them to the live production database, eliminating service delivery interruptions.

Fiscal Control & Evaluation Upgrades

- **Centralized Fee Rate Library:**
 - Streamlines financial management by housing standardized fee schedules in a centralized engine. This drives down manual calculation errors, automates multi-departmental rate updates, and guarantees auditing accuracy.

Automated Inspection Scheduling & Field Capacity Management

The most significant engineering development is a comprehensive field scheduling system built to transform the tracking of field operations from manual tracking to an automated, resource-aware workflow. This directly optimizes the field management landscape through three operational vectors:

- **Geographic Field Zoning & Resource Distribution:**
 - District-Based Operations: Establishes geographic zoning boundaries directly inside the platform to ensure field inspections are structurally grouped by location.
 - Intelligent Inspector Assignment: Dynamically map inspectors to specific geographic zones while natively supporting "floating" inspectors to handle fluid cross-district demand.

- Customizable Shift Balancing: Equips supervisors with the ability to define individualized AM and PM scheduling slot counts per inspector, taking into account specialized assignment scopes.
- **Automated Capacity Optimization & Supervisor Oversight:**
 - Real-Time Capacity Automation: Systematically calculates district-wide availability automatically, eliminating manual cross-referencing and scheduling over-allocation.
 - District Capacity Dashboard: Provides supervisors with near real-time operational visibility into field workloads across the entire City footprint.
 - Dynamic Surge & Capacity Management: Gives management the agility to inject emergency scheduling capacity on-the-fly to absorb unexpected field demands, while capturing and bulk-assigning overflow requests systematically.
 - Duration-Aware Balancing: Automatically recognizes long-duration inspection types and deducts their equivalent slot weight from an inspector's daily capacity, preventing field burnout.
- **Sequential Tracking & Workflow Integrity:**
 - Granular Tracking Per Type: Allows distinct inspection types to be scheduled independently, tracked through unique histories, and handled by different specialized inspectors.
 - Multi-Day and Vertical Splitting: Natively supports splitting a single inspection type across multiple calendar days or separating reviews per floor for major high-rise construction developments.
 - Enforced Logic Sequencing: Restricts scheduling anarchy by enforcing a strict required order of operations based on San Francisco's custom templates (e.g., framing must pass before drywall can occur).
 - Automated Progress Summaries: Automatically closes an overarching step the moment all individual underlying inspections pass, updating both internal staff summaries and the applicant portal simultaneously to decrease status inquiries.

Workflow Efficiency Enhancements

- **Local Template Control & Enforced Logic Sequencing:**
 - Rather than forcing staff to manually police the scheduling order of complex field actions, the platform natively enforces chronological sequencing based on San Francisco's pre-configured business rules (e.g., preventing a drywall inspection from being requested before structural framing is formally logged). This safeguards workflow compliance while keeping complete structural custody of the templates in the hands of internal City administrators.
- **Isolated Inspection Auditing & History Tracking:**
 - To eliminate overlapping record-keeping and diagnostic confusion, every individual inspection type maintains its own dedicated, permanent history file. This provides field staff and supervisors with an instant, unclouded timeline of previous results, notes, and re-inspections for that specific trade, without sifting through unrelated records.
- **Real-Time Progress Summaries:**

- The platform generates a live, per-step operational summary showing precisely how close a multi-layered permitting phase is to final sign-off. This immediate transparency allows administrative staff to track overall case progression at a glance and drastically cuts down on repetitive manual status inquiries from both applicants and internal teams.

18. How will future feature requests be handled in terms of prioritization and OpenGov compensation?

Future feature requests fall into one of three categories below:

1. **Internal Configuration:** Assess whether City staff can implement the change independently using standard platform administration tools. There is no cost to the City.
2. **Core Product Enhancement:** Submit the request to OpenGov for consideration as part of their standard product roadmap. If prioritized by OpenGov engineering, these enhancements are rolled out globally to all customers as part of core platform updates and do not require additional compensation from the City. This is included in our software license. There is no cost to the City.
3. **Change Order:** If specific, customized functionality is required immediately, the City may pursue a formal Change Order process to prioritize and fund the development of that special functionality. The cost of these changes cannot be predicted until the City and OpenGov thoroughly explore the specific business problem, the proposed technical solution, and the exact scope of work required for implementation.

19. If workflow inefficiencies increase due to missing OpenGov functionality (e.g., instant permit issuance), will the Department be allowed to hire additional staff to offset the increased workload?

The Department continuously monitors staff workload to ensure staffing levels and workloads remain appropriate to support departmental operations and maintain service levels. If adjustments are needed, staffing resources will be evaluated and addressed as appropriate.

20. What is the security and governance plan? Thus far, it seems to be limiting technical staff's administrative access.

The platform's security and governance architecture follows established enterprise IT best practices designed to protect data integrity, enforce strict data custody rules, and insulate the City's production environment against unintentional system disruptions. Rather than restricting technical capability, the governance framework optimizes it by establishing distinct, clear environments for development and live operations.

To ensure system stability, direct configuration adjustments are not performed globally on the live, public-facing database. Instead, technical staff utilize isolated staging and sandbox environments to safely prototype and test system enhancements without risking disruption to daily departmental operations or public service delivery.

Platform administrative access is systematically mapped to specific functional assignments. This role-based configuration aligns technical classifications precisely with their designated operational scopes, minimizing administrative overlap and protecting the system's security architecture.

Modifications, configuration updates, and system-wide structural enhancements are promoted from sandbox environments to production through a formalized change-management process. This protocol guarantees that all technical modifications are thoroughly reviewed, logged, and audited prior to deployment.

21. Who has authority to override SME and how does their authority relate to the department's organizational chart?

We have standing bi-weekly PermitSF Executive Leadership meetings with Department heads or their designees who have authority to override their agency's SMEs' recommendations.

22. Does OpenGov's platform contain logs that enable users to view and track the history of a permit application? If a permit request is approved, denied, or sent back to the applicant for revision, can City staff see who worked on the permit request previously and view what changes were made?

Yes. The OpenGov platform contains built-in system audit logs that track the comprehensive lifecycle of every permit application. These logs record permit activities in real time, and any changes are documented in publicly accessible electronic files.

Authorized City staff have native access to view a detailed history log for any individual file. This ledger records every system action, including when an application is approved, denied, or returned to an applicant for revision. The log explicitly captures the time, employee, modifications and administrative notes associated with a system action.

The parties are next scheduled to meet on Tuesday, June 16, 2026, from 2:00-4:00 PM. The City is available to meet to discuss the information contained herein prior to that date and time. If you are available to do so, please contact Employee Relations Representative Greg Stalfa at gregory.stalfa@sfgov.org with your availability prior to June 16, 2026.

City and County of San Francisco
 Carol Isen
 Human Resources Director



Department of Human Resources
Connecting People with Purpose
www.sfdhr.org

Via Email

DATE: June 12, 2026

TO: Emily Wallace, Representative, IFPTE Local 21

FROM: Greg Stalfa, Employee Relations Representative

CC: Mark Weirick, Regional Director, IFPTE Local 21
 Jessica Nuti, Representative, IFPTE Local 21
 Elizabeth Watty, Director of PermitSF & Director of Current Planning
 Rebecca Villareal-Mayer, Director, Joint Technology Division
 Claire McCaleb, Acting Classification and Compensation Director
 Ardis Graham, Employee Relations Director
 Jonathan T. Wright, Assistant Employee Relations Director

RE: International Federation of Professional and Technical Engineers, Local 21 - Request for Information – Personal Service Contract DHRPSC0006234

Dear Emily Wallace,

The City and County of San Francisco (City) is in receipt of your Request for Information (RFI) dated June 8, 2026, regarding Personal Service Contract number DHRPSC0006234 (PSC 6234). The City submits the responses below in [blue font](#) in satisfaction of this request.

15. Do all OpenGov customers share the same software infrastructure? Do all OpenGov customers share the same code base? Are the customers secure from other OpenGov customers? Does CCSF share the same backend database with other OpenGov customers?

[OpenGov operates a multi-tenant SaaS platform on AWS and Azure, similar to other SaaS providers. Each customer's data is logically isolated at the application and database layer; there is a shared underlying cloud infrastructure. Data is not accessible to other customers.](#)

[Tenant isolation is enforced through application-level RBAC and data partitioning controls.](#)

16. How many vendor employees, contractors, or subcontractors currently have access to customer production environments, and in which countries are they located?

[Access is restricted to specific OpenGov employees in the United States and Pune, India. More detailed information can be provided directly to CCSF upon request, under appropriate confidentiality terms.](#)

**17. How many vendor personnel currently have direct database access to CCSF production customer environments, and are such activities logged and auditable?
 How is this information logged, and how can CCSF staff access these logs?**

All production activity is logged and auditable. It is available for all San Francisco city administrators to see what is happening in the environment.

18. Under what circumstances is customer production data copied into development, test, support, or training environments, and is sensitive data masked before such copies are made? Please describe in detail to what extent the sensitive data is masked, and the specific steps OpenGov takes to mask sensitive data.

The City is fully aware that production data is copied into the test environment for operational and validation purposes. The City did not provide requirements to OpenGov to mask sensitive data within this test environment. This is because the City maintains comprehensive confidentiality agreements with all participating staff. These agreements dictate that staff must treat, protect, and use data in the test environment with the same strict appropriateness and confidentiality as required in the production environment. Therefore, active data-masking steps are not implemented for this specific environment.

19. Are encryption keys unique to each OpenGov customer, or can the same encryption keys be used to access data belonging to multiple customers? How is Personal Identifiable Information (PII) secured in the OpenGov system?

Customer data in the permitting and licensing product is isolated at the database level. Each customer is provisioned with a dedicated database, ensuring that application credentials, queries, and data access are restricted to that customer's environment. This tenant-level database segregation serves as the primary control preventing cross-customer access to data.

All customer data, including personally identifiable information (PII), is encrypted both at rest and in transit. Data at rest is protected through transparent data encryption provided by the underlying managed database service, while data in transit is secured using Transport Layer Security (TLS). These controls are implemented and maintained as part of OpenGov's SOC 2 compliance program.

20. Has the OpenGov platform experienced any security incidents, unauthorized disclosures, or access-control failures involving customer data or PII during the past three years? If so, how were affected customers notified by OpenGov, and how was each security incident resolved by OpenGov?

OpenGov maintains a documented incident response program and has undergone annual SOC 2 Type II audits. In the event of a qualifying incident, customer notification procedures are governed by contract/DPA terms. We have suffered no material breaches in the last three years.

21. What framework(s) does OpenGov use for the public-facing components of their system? Is the framework on a recent version that is supported, and are all packages up to date according to the National Vulnerability Database (NVD)?

OpenGov maintains a vulnerability management program that includes continuous scanning against the NVD and the CISA Known Exploited Vulnerabilities (KEV) catalog. Framework and dependency versions are actively maintained and updated in response to published CVEs.

Specific component versions are not disclosed publicly, as doing so could create undue security exposure, but this is validated as part of OpenGov's annual SOC 2 Type II audit.

22. Local 21 requests a list of anyone with administrative and/or “super user” access to the CCSF OpenGov instance. Please define all levels of access for CCSF staff and non-CCSF staff and the permission available with each level of access.

OpenGov can provide a confidential list of OpenGov employees who have been added to the SF production environment, along with access-level definitions, through the appropriate secure channel with CCSF's designated IT/security contacts, as prescribed by the terms of the contract.

23. Local 21 requests an audit log of the GIT commits and a list of all direct database access logs that have occurred between October 2025 and today.

Providing raw GIT commit histories and direct database access logs in a public forum would expose system configuration details and access patterns that adversarial actors could exploit, creating security risk for OpenGov, CCSF and its residents. This information is available to CCSF through the appropriate contractual data-request process with authorized City security and IT personnel, under suitable confidentiality protections.

**24. Does OpenGov have a mechanism to track staff time against a project and can the system track transactional billing rates, and generate invoices based on staff time logged? What impact do proposed billing changes have on the OpenGov system?
Can staff directly update the fee schedule in OpenGov?**

Using OpenGov's flexible form configuration, users can create custom fields to track time spent on a project, and system administrators can update fee schedules as needed. However, there is currently no native way to generate invoices directly from employee time tracked against a project.

25. Are OpenGov consultants currently stationed to work in 49SVN? Have OpenGov consultants historically been assigned to work in 49SVN? If so, how many?

OpenGov has committed to an onsite presence in San Francisco throughout implementation. The number of OpenGov staff varies depending on the work being completed for the week. During the training phase, five to six OpenGov staff are on hand two to four days per week.

The parties are next scheduled to meet on Monday, June 15, 2026, from 2:00-3:00 PM. If you have any questions or concerns, please contact Employee Relations Representative Greg Stalfa at gregory.stalfa@sfgov.org.

Current Staff Engagement

Last Name	First Name	Classification	Department	Division	Reports To	OpenGov Time Allocation	Day-to-Day Tech Tasks
1. Tsai	Stephanie	9976	CPC	PermitSF Team	Liz Watty	100%	<ul style="list-style-type: none"> • Admin access • OpenGov technical product lead/project manager (PM) • Manages scope • Co-manages RAID log with OpenGov PM • Stakeholder management and alignment
2. Bindman	Sarah	9976	MYR	PermitSF Team	Liz Watty	50% - 100%	<ul style="list-style-type: none"> • Admin access • Technology lead • Collaborates on technical solution design for permit platform • Manages technology integration strategy • Validates feasibility with City staff
3. Bender	Darcy	9976	ADM	PermitSF Team	Liz Watty	100%	<ul style="list-style-type: none"> • Admin access • Lead current state interviews with City staff to understand processes, challenges, and needs • Configure and maintain workflows, forms, and solutions in OpenGov • Design and document future state processes to improve efficiency and service delivery • Own the continuous improvement cycle by identifying, prioritizing, and implementing enhancements. • Translate business requirements into system configurations and operational solutions • Partner with stakeholders to align technology, processes, and business goals

							<ul style="list-style-type: none"> • Monitor performance and recommend ongoing process and system improvements • Led service design, customer, and user experience
4.Hicks	Bridget	5293	ECN	PermitSF Team	Liz Watty	100%	<ul style="list-style-type: none"> • Admin access • Lead current state interviews with City staff to understand processes, challenges, and needs • Configure and maintain workflows, forms, and solutions in OpenGov • Design and document future state processes to improve efficiency and service delivery • Own the continuous improvement cycle by identifying, prioritizing, and implementing enhancements. • Translate business requirements into system configurations and operational solutions • Partner with stakeholders to align technology, processes, and business goals • Monitor performance and recommend ongoing process and system improvements • Obtain alignment with executive leadership between departments, divisions, staff, and customers
5.Reza	Amindarbari	1054	CPC	Data & Analytics	Rebecca Mayer	10%	<ul style="list-style-type: none"> • OpenGov data strategist • Develop and implement data collection systems for land use

							<ul style="list-style-type: none"> • Design, build, launch and maintain efficient data extraction, transformation and loading processes • Develop and maintain databases, data models and data visualizations including Power BI dashboards, ArcGIS maps and other data products
6. Wall Shui	Megan	1825	CPC	Data & Analytics	Reza Amindarbari	10%	<ul style="list-style-type: none"> • Previous data performance lead for OpenGov • Develops and maintains performance dashboards and reporting to support staff operational performance monitoring
7. Smith	Matt	1043	ADM	DataSF	Soumya Kalra	20%	<ul style="list-style-type: none"> • Developed data pipelines between OpenGov and City • Design custom data transformations
8. Vacant	Vacant	1042	ADM	DataSF	Soumya Kalra	15%	<ul style="list-style-type: none"> • Developed business requirements for Phase 1A • Facilitated data governance for Phase 1A
9. McLendon	Helen	1044	ADM	DataSF	Soumya Kalra	10%	<ul style="list-style-type: none"> • Data pipeline development to Snowflake • Data strategy • Design custom data transformations
10. Valdez	Sam	1054	DT	Emerging Tech	Jane Gong	15%	<ul style="list-style-type: none"> • Manages Enterprise Address System for City • Software modifications to support OpenGov • Address transformation to support OpenGov integration

11. Navarro	Carlos	5380	DT	Emerging Tech	Sam Valdez	10%	<ul style="list-style-type: none"> • Address transformation to support OpenGov integration
13. Wynne	Mike	1054	CPC	Infrastructure & Network	Micheal Sanders	15%	<ul style="list-style-type: none"> • Supported integration of PIM to OpenGov • Maintains City's GIS application for properties • Responds to new service request • Provides backup support for Accela • Primary technical support for Arches
14. Sherbin	Theodore	1051	CPC	Products & Solutions	Raymond Yip	20%	<ul style="list-style-type: none"> • Addressing support to EAS Team • OpenGov to OnBase integration lead (business requirements and project management)
15. Yip	Raymond	933	CPC	Products & Solutions	Rebecca Mayer	10%	<ul style="list-style-type: none"> • Plans and analyzes strategic solutions/applications need • Performs as web application development SME • Performs unit and system testing of developed systems and applications • Leads the application help desk in responding to technical issues and change requests
16. Lam	Hung	1053	CPC	Products & Solutions	Raymond Yip	40%	<ul style="list-style-type: none"> • Requirement analysis, assessment and design, and testing of OpenGov middleware solutions • Performs unit and system testing of developed systems and applications • Performs ongoing maintenance and support PTS and Online Permit, Oracle Forms and all other mission critical databases

							<ul style="list-style-type: none"> • Performs as cloud and on-prem application infrastructure backup • Performs as primary database administrator • Leads the Data and DevOps team
17. Nguyen	Kelvin	1053	CPC	Products & Solutions	Raymond Yip	25%	<ul style="list-style-type: none"> • Requirement analysis, assessment and design, and testing of OpenGov middleware solutions • Performs unit and system testing of developed systems and applications • Performs ongoing maintenance and support PTS and Online Permit, Oracle Forms and all other mission critical databases • Performs as Oracle 12C migration SME
18. Pang	Jenson	1053	CPC	Products & Solutions	Raymond Yip	25%	<ul style="list-style-type: none"> • Requirement analysis, assessment and design, and testing of OpenGov middleware solutions • Performs unit and system testing of developed systems and applications • Performs ongoing maintenance and support PTS and Online Permit, Oracle Forms and all other mission critical databases • Performs as web application development backup • Performs as Oracle 12C migration SME
19. Ng	Jeffrey	1043	CPC	Products & Solutions	Raymond Yip	15%	<ul style="list-style-type: none"> • Requirement analysis, assessment and design, and testing of OpenGov middleware solutions • Performs unit and system testing of developed systems and applications

							<ul style="list-style-type: none"> • Performs ongoing maintenance and support PTS and Online Permit, Oracle Forms and all other mission critical databases • Performs as a SME for web application support and maintenance • Leads the Solution development team
20. Wallner	Mori	1824	CPC	Admin & Management	Rebecca Mayer	15% - 50%	<ul style="list-style-type: none"> • Supports OpenGov integrations with City payment products • Vendor management for OpenGov integrating software (Bluebeam, EUNA) • FinTech specialist • Performance management lead for Customer Service • Technology procurement specialist
21. Reynolds	Michelle	9251	OSB	PermitSF	Katy Tang	50%	<ul style="list-style-type: none"> • Internal and external communications • Customer engagement • Technical writing • OSB program management (grants, legacy business)
22. Yuke	Bruce	1070	CPC	User Experience	Rebecca Mayer	15%	<ul style="list-style-type: none"> • OpenGov Outlook integration scoping and project management • Manages key Oracle project including new fee schedule and Oracle Forms upgrade • Managing projects associated to Transfer of Function • Managing projects integrating PTS and Oracle

23. Tek	Vigeth	1092	CPC	Desktop Support	Rodell Jacinto	15%	<ul style="list-style-type: none"> • Admin access • OpenGov user account setup • OpenGov help desk ticket triaging • OpenGov Bluebeam support • Technical support & administration • Hardware & device management • System & software deployment
24. Pettus	Brian	1823	CPC	Products & Solutions	Ron Butler	20%	<ul style="list-style-type: none"> • Admin access • Responds to OpenGov workflow tickets • Supports OpenGov enablement lead with post go-live product support • Manages workflow processes for Permit Salesforce instance • FinTech backup
25. Siu	Chris	1044	CPC	Infrastructure & Network	Rebecca Mayer	5%	<ul style="list-style-type: none"> • Monitors network performance, and responds to infrastructure issues • Developing new network structure to support CPC/DBI merge
26. Ip	Kevin	1043	CPC	Infrastructure & Network	Chris Siu	10%	<ul style="list-style-type: none"> • Monitors network performance, and responds to infrastructure issues • Developing new network structure to support CPC/DBI merge

APPENDIX C

Staff Transition Plan

The City is currently developing a plan to transition specific technical components back to civil service employees. We are working with OpenGov to formalize this approach in a new Statement of Work for the contract amendment. Though the proposal is not yet final, the framework and timeline have been established.

In the initial February launch, a small group of City staff worked with the OpenGov team to configure the platform. Now, as we head into our summer launches, City staff has been taking the lead more in configuring and testing the system, and the project team is set to expand.

As we begin to bring more staff onto the project, we are committed to providing the training and support necessary to prepare staff to be successful. This includes setting up dedicated time for the incoming project team members and current team members to walk through the entire system and share knowledge as well as OpenGov providing OpenGov certification training to City employees.

The goal is to build internal capacity to run and maintain the system independently over the next three years.

As the project moves forward, City staff will gradually take on more day-to-day responsibilities, including:

- **System configuration and maintenance** — City staff trained on the platform will own configuration updates, workflow modifications, and ongoing system management
- **Business requirements definition** — City staff decide and define how the platform must behave; OpenGov translates those requirements during implementation and equips City staff to take on these tasks directly as the City matures its usage
- **User support and troubleshooting** — City staff will serve as the first line of support for permit applicants and internal users
- **Reporting and data oversight** — City staff own the operational data and reporting functions within the platform

This doesn't happen all at once. Responsibilities shift gradually, tied to each project milestone. Staff won't be handed new duties without proper training and documentation first — hands-on support from OpenGov is built into every phase. Over time, the efficiency gained from using OpenGov are expected to free up staff to focus on more complex work. The following document details staff activities throughout the implementation.

Project Phase/Timeline	Vendor Activity	Knowledge Transfer Tactic
Year 1 (FY26) Active Learning	Foundation & Setup Vendor configures the system, connects/integrates to core City systems, and hands over administrative controls.	Side-by-Side Mentorship Internal technical staff partner directly with the vendor team to map business process logic, train internal staff, set up user roles and permissions, and enable management of administration tools.
Year 2 (FY27) Co-Delivery	Shared Ownership	Collaborative Building

APPENDIX C

	City begins to manage technology changes to the platform and workflow. Vendor transitions to an advisory role and responds to requests for design revisions on live applications.	As new platform components are configured and finalized, City staff will assume responsibility for standard software administration, including workflow updates, mappings and custom integrations.
Year 3 (FY28) Full Autonomy	Support/Advisory Vendor engagement is limited to standard global SaaS cloud maintenance or updates, and staff support upon request.	Internal Mastery City assumes the lead support role by standardizing core configuration and deployment support to assist with onboarding future agencies.

Client Team Structure & Engagement Model

OpenGov Implementation Methodology

A successful OpenGov deployment depends on coordinated engagement across your organization: the right people, in the right roles, at the right times.

This document describes the client team structure that OpenGov recommends for implementation projects, including each role's responsibilities, estimated level of effort, and how each role participates across the Testing, Training, Readiness, and Launch phases.

The Workstream Model

Each functional area in your organization designates a Workstream Lead who serves as the primary point of contact between your team and the OpenGov implementation team. Workstream Leads are engaged throughout the project leading up to go-live.

What Workstream Leads Do

- Represent business processes and requirements for their functional area
- Validate system configuration against real-world operations
- Support internal team readiness and training delivery
- Drive adoption within their department post-launch
- Serve as the first line of support during and after go-live

Note: *Workstream Leads may also be engaged earlier during Validation and Configuration phases to provide input, review workflows, and ensure alignment with real-world operations.*

Your Project Team: Roles & Responsibilities

The table below outlines each role on the client side, what they do, and what level of time commitment to expect. OpenGov recommends filling all roles before kickoff to avoid delays and ensure clean milestone sign-offs.

Project Sponsor	
Role Description	Oversees high-level progress of the deployment; partners with the OpenGov Project Advisor to resolve escalated items or concerns. Attends steering committee meetings as defined.
Key Responsibilities	<ul style="list-style-type: none"> • Provide executive-level support and organizational authority • Attend steering committee meetings and approve major decisions • Help remove internal blockers and reduce identified risks • Establish and secure strategic priorities for the project • Partner with the OpenGov Project Advisor on escalated concerns

Project Manager / Owner	
Role Description	Primary point of contact for all project operational tasks. Works closely with the OpenGov Project Manager to review project plans, report on status, and obtain approvals.
Key Responsibilities	<ul style="list-style-type: none"> • Serve as the primary point of contact for day-to-day project coordination • Review and approve project plans, schedules, and milestone sign-offs • Manage and coordinate internal project team members • Ensure availability of required resources at each phase • Communicate project status to internal stakeholders • Monitor service delivery and implement strategic plans • Provide escalation and risk support to the Project Sponsor

Business Subject Matter Expert (SME)	
Role Description	Validates and refines the scope of future-state processes; provides the OpenGov team with the direction needed to achieve desired business outcomes. May create test scripts and participate in testing.
Key Responsibilities	<ul style="list-style-type: none"> • Answer business process questions raised by the OpenGov team • Validate and refine future-state workflows and configuration design • Sign off on solution blueprint documentation and scope

	<ul style="list-style-type: none"> • Provide clear internal alignment and decision-making • Participate in validation workshops and configuration reviews • Assist in developing and executing test scripts • Support change management and internal communications
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Solution User / Champion

Role Description	Validates functional scope of future-state processes from an end-user perspective. Partners with Implementation Consultants and Solution Architects to confirm the solution meets day-to-day operational needs.
Key Responsibilities	<ul style="list-style-type: none"> • Validate that configuration matches real-world operational workflows • Execute test scenarios during User Acceptance Testing (UAT) • Identify gaps between configured behavior and expected outcomes • Participate in train-the-trainer sessions and support end-user training delivery • Reinforce new processes within their teams post-launch • Serve as first line of support for their teams during and after go-live • Distinguish between training issues and system issues

Data Subject Matter Expert (SME)

Role Description	Provides functional and technical knowledge to enable data decisions throughout the implementation. Validates data scenarios and ensures data availability in line with business rules and processes.
Key Responsibilities	<ul style="list-style-type: none"> • Validate data scenarios and confirm data availability from source systems • Ensure business rules governing data are established and documented • Support the OpenGov Data Solutions Engineer with data mapping and migration • Respond to data QA questions during the Configure phase • Validate the integrity of migrated data during testing cycles • Confirm that data integration flows match documented specifications

Technical Lead

Role Description	Provides expertise related to your organization's architecture, security, and system infrastructure. Answers technical questions raised by the OpenGov team regarding user provisioning, integrations, or IT processes.
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Key Responsibilities

- Provide technical input on architecture, security, and user provisioning
- Validate technical integration requirements and data infrastructure
- Set up data integration processes within customer environments
- Respond to technical questions raised during configuration and testing
- Ensure system readiness for production cutover
- Support SSO configuration and IT-related prerequisites

Phase-by-Phase Engagement

The four phases below describe how your team engages across the implementation. Each phase builds on the prior one — testing validates configuration, training builds on tested workflows, readiness confirms operational alignment, and launch transitions your team into live operations.

1. Initiate

The Initiate phase establishes the foundation for everything that follows. Your team and the OpenGov Project Manager align on project structure, introduce key stakeholders, confirm resource availability, and agree on the tools, cadences, and timeline that will govern the engagement.

What Your Team Does

- Appoint your Project Sponsor, Project Manager/Owner, and core project team
- Confirm availability of management resources for the steering group
- Participate in the Welcome Call and project kickoff workshop
- Review and prepare current “as-is” business flows and data scope
- Begin internal change management and communications planning
- Review OpenGov documentation and standard data specifications

Workstream Lead Role

- Be identified and introduced to the OpenGov team
- Confirm bandwidth and availability for the project duration
- Begin reviewing relevant business processes in preparation for Validate

Key Deliverables Requiring Your Input

- Confirmed project team roster (sponsor, PM, SMEs, technical lead)
- Signed Project Charter — including success criteria, compelling dates, and UAT exit criteria
- Availability of current business process documentation

Estimated Level of Effort (per week)

- **Project Sponsor:** 2–4 hours (kickoff and charter review)
- **Project Manager / Owner:** 20+ hours/week
- **Business SMEs / Workstream Leads:** 10 hours (introductions and initial scoping)

2. Validate

The Validate phase is where your business processes are translated into documented system design. OpenGov works closely with your team to understand your workflows, map configuration options to your use cases, and produce the Solution Blueprint Document (SBD) — the governing specification for everything built in Configure.

What Your Team Does

- Participate in validation workshops to walk through your current processes and future-state requirements
- Review and provide feedback on configuration options presented by OpenGov
- Confirm data requirements and integration needs with your Data SME and Technical Lead
- Review and sign off on the Solution Blueprint Document — this document locks scope
- Finalize and baseline the project schedule
- Approve the test plan strategy and training plan

Workstream Lead Role

- Serve as the primary business voice during validation workshops for your functional area
- Confirm that proposed workflows and configuration match real operational needs
- Escalate any gaps or conflicts between the proposed design and your business rules
- Provide timely decisions to keep the project moving — ambiguity in this phase creates risk downstream

Key Deliverables Requiring Your Input

- Signed Solution Blueprint Document (scope baseline — changes after this point require a Change Request)
- Validated requirements matrix aligned to the Statement of Work
- Approved test plan strategy and training plan
- Baseline project schedule

Note: *Sign-off on the Solution Blueprint Document is mandatory before Configure begins. This is the most consequential approval in the project — it defines what gets built.*

Estimated Level of Effort per week

- **Project Sponsor:** 2–4 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs / Workstream Leads:** 15–20 hours
- **Data SME:** 10 hours hours
- **Technical Lead:** As needed for integration and SSO requirements

3. Configure

In the Configure phase, OpenGov builds and tests the solution against the approved Solution Blueprint. Your team's role shifts toward data preparation, providing QA responses, and identifying the right people for UAT and training.

What Your Team Does

- Provide master data and data migration inputs as requested by the OpenGov Data Solutions Engineer
- Respond promptly to data QA questions to keep integration work on track
- Set up data integration processes within your own systems where required
- Participate in an end-to-end demo of the configured solution with the OpenGov team
- Identify and confirm the team members who will participate in UAT and Training
- Begin preparing internal test scenarios based on your real business cases

Workstream Lead Role

- Review configuration checkpoints as they are presented by OpenGov
- Flag any discrepancies between the configured system and your approved design
- Confirm your team's readiness and availability for the upcoming Test phase

Key Deliverables Requiring Your Input

- Data migration QA responses
- Confirmation of UAT and training participants

- Internal test scripts based on your operational scenarios
- Sign-off on the Configure phase (M3 Milestone) confirming the built solution meets documented specifications

Estimated Level of Effort

- **Project Sponsor:** 2–4 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs:** 10–15 hours
- **Data SME:** 6–10 hours during data migration and integration work
- **Technical Lead:** 4–8 hours during integration setup

4. Testing

Validation of the system using real-world scenarios to ensure workflows, rules, and outputs function as expected. Also called user acceptance testing (UAT) or end-to-end user testing.

What Your Team Does

- Execute test scenarios based on real operational workflows
- Validate forms, routing, notifications, and outcomes
- Identify and document defects or gaps
- Provide feedback and approve system readiness

Workstream Lead Role

- Provide feedback on testing design and coverage
- Lead testing for their functional area
- Coordinate testers and consolidate feedback
- Help make decisions on priority fixes vs. future enhancements

Going Into This Phase

- Workstream Leads have been introduced to system configuration through workflow walkthroughs and demonstrations
- Scenario-based SOPs are drafted to reflect real-world processes
- Test scenarios and scripts are prepared and aligned to those SOPs

Estimated Level of Effort

- **Project Sponsor:** 1-2 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs:** 10-15 hours
- **Data SME:** 2-4 hours
- **Technical Lead:** as needed

5. Training

Preparation of end users to confidently and effectively use the system on day one. Training materials are based on tested, real workflows.

What Your Team Does

- Participate in train-the-trainer sessions
- Validate training materials against actual workflows
- Deliver or support internal team training
- Identify and address knowledge gaps

Workstream Lead Role

- Act as subject matter experts during training delivery
- Translate system functionality into day-to-day operations language
- Reinforce new processes within their teams

Going Into This Phase

- Core workflows and SOPs have been validated through testing
- Workstream Leads have hands-on familiarity with the system
- Training materials are developed from tested, real workflows

Estimated Level of Effort

- **Project Sponsor:** 1-2 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs:** 10 hours
- **Data SME:** as needed
- **Technical Lead:** as needed

6. Readiness (Pre-Go-Live Preparation)

Final alignment of people, processes, and system configuration to ensure a smooth transition to production.

What Your Team Does

- Confirm staff roles, responsibilities, and workflow ownership
- Finalize SOPs and internal job aids
- Validate reports, dashboards, and operational processes
- Prepare for go-live: cutover planning, communications, support model

Workstream Lead Role

- Ensure their team is operationally ready
- Communicate expectations and process changes to their department
- Identify and resolve any remaining gaps before launch

Going Into This Phase

- Users have been trained on validated workflows
- SOPs reflect finalized system behavior
- Remaining gaps from testing and training have been addressed or prioritized

Estimated Level of Effort

- **Project Sponsor:** 1-2 hours
- **Project Manager / Owner:** 10 hours
- **Business SMEs:** 6-10 hours
- **Data SME:** as needed
- **Technical Lead:** as needed

7. Launch (Go-Live & Hypercare)

Transition to live system usage with structured support to ensure adoption and stability. The Hypercare period provides elevated support while your team builds confidence in the new system.

What Your Team Does

- Provide day-one support to end users
- Triage issues and escalate as needed to OpenGov
- Reinforce adoption of new workflows and prevent fallback to legacy processes
- Gather feedback for continuous improvement

Workstream Lead Role

- Serve as first line of support for their teams
- Distinguish between training issues and system issues
- Drive consistent usage and prevent reversion to legacy processes

Going Into This Phase

- Teams are trained and aligned on new processes
- Operational readiness is confirmed across workstreams
- Support structure and escalation paths are clearly defined

Estimated Level of Effort

- **Project Sponsor:** 5-10 hours
- **Project Manager / Owner:** 20+ hours
- **Business SMEs:** 20+ hours
- **Data SME:** 10 hours
- **Technical Lead:** 5-10 hours

Responsibility Summary (RACI)

The table below summarizes how each client role is engaged across key project activities. RACI stands for: Responsible (does the work), Accountable (owns the outcome), Consulted (provides input), Informed (kept up to date).

Phase	Key Activity / Deliverable	Project Sponsor	Project Manager	Business SME	Solution User / Champion	Data SME	Technical Lead
Initiate	Appoint sponsor & project team	A	R	I	I	I	I
Initiate	Coordinate customer team ramp-up	I	C	A	C	C	C
Initiate	Review current "as-is" business flows	I	C	R/A	C	C	C
Validate	Validate solution design & sign-off	I	A	R	C	C	C
Validate	Change management transitions	I	C	A	C	C	C
Validate	Test plan strategy sign-off	I	A	R	C	C	C
Configure	Data integration QA responses	I	C	C	C	R/A	C
Configure	Identify resources for UAT & Training	I	A	R	C	C	C
Train	User Acceptance Testing	I	A	C	R	C	C
Train	Business Readiness Checkpoint	C	A	R	C	C	C
Launch	Go-Live sign-off (M5)	A	C	C	C	C	C
Launch	Evaluate success of deployment	A	C	R	C	C	C

Governance Model

OpenGov's governance model structures project oversight into four levels, providing the right support, perspective, and decision-making authority at each tier of your organization.

Level	Name	Who	Focus	Cadence
4	Strategic	Executive Project Sponsors	Establish & secure strategic priorities	Quarterly
3	Stakeholders	Project Sponsors, Regional Directors	Approve business solution & technical approaches	Monthly / Bi-weekly
2	Management	Project Manager / Owner	Monitor service delivery, risk, budget, timeline	At least weekly

1	Operational	Business SMEs, Solution Users, Data & Technical Leads	Execute project tasks; accountable to Project Manager	Daily
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Each level has a defined meeting cadence designed to keep the project progressing with the right visibility at the right altitude – from daily operational execution to quarterly strategic alignment.

Quick Reference: Who to Involve When

Project Phase	Primary Roles to Engage
Initiate	Project Sponsor · Project Manager / Owner · Business SMEs
Validate	Project Manager / Owner · Business SMEs · Technical Lead (as needed)
Configure	Business SMEs · Data SME · Technical Lead
Test (UAT)	Solution Users / Champions · Business SMEs · Data SME
Train	Solution Users / Champions · Business SMEs
Readiness	Project Manager / Owner · All Workstream Leads
Launch	All Roles · Workstream Leads as first-line support
Hypercare	Project Manager / Owner · Solution Users / Champions

City-owned Configuration.

OpenGov Admin Certification — what city staff learn to own

The certification is a structured, two-level program built for one outcome: **city staff who configure, manage, and evolve their own permitting environment without OpenGov dependency.** Every skill below is one PermitSF controls.

WHAT PERMITSF STAFF WILL DO THEMSELVES

System configuration & access control

"Who sets up users and controls who can see what?"

- Configure org settings, departments, and date/time
- Set up and update public portal branding, theme, search settings, and project display
- Add, edit, and remove user accounts; set and modify access levels
- Create and manage user groups; assign group-based permissions
- Enterprise Access Control (EAC): granular role-level permissions
- Test Mode: safely validate any config change before it goes live

Record types, forms & fees

"Who builds and changes our permit and license forms?"

- Access, navigate, and manage all record types
- Add new form fields, re-order existing ones
- Configure conditional logic: show/hide fields based on applicant input
- Build multi-entry form sections (subcontractor lists, fixture counts, etc.)
- Set up and maintain fee schedules and rate-based calculations
- Configure partial refunds, fee waivers, and ledger reconciliation
- Build and maintain a Rate Library for reusable fees across record types
- Link related records across departments (e.g. planning approvals to building permits)
- Configure Plan Review workflows and connect to permit records
- Build document templates: merge tags, error handling, formatting and layout
- Embed images, signatures, and barcodes in templates
- Connect documents to specific workflow steps

Inspections, renewals & workflows

"Who manages day-to-day operations when things change?"

- Create and configure inspection types and schedule settings
- Manage the Inspect tab: assign, complete, and step through inspections
- Handle concurrent inspection workloads across staff
- Manage coverage when staff are absent — reassign without vendor help
- Configure Smart Inspections: routing and schedule optimization

- Set up mobile app access and configuration for field inspectors
- Build renewal workflows with conditional form logic
- Set up automated renewal campaigns and notification schedules
- Configure Communication Center: message templates and applicant notification triggers
- Auto-assign workflow steps based on group workload
- Configure inspection results to trigger record expiration date changes

Reporting & data

"Who pulls the numbers when leadership asks?"

- Build, customize, and save in-app reports
- Track open records, pending approvals, and inspection status
- Run GL reports and perform payment reconciliation
- Configure Department Form Fields to standardize data across record types
- Use smart templates and searchable record types on the public portal

HOW DEEP THE LEARNING GOES

AWARENESS

Know what's there and why

Staff understand what each feature does, where it lives, and how it connects to their daily work.

SF example: A DBI inspector knows Smart Inspections exists and what routing optimization means for their workload.

COMPETENCY

Configure it without asking

Staff build, change, and troubleshoot configurations independently. Validated through hands-on exercises.

SF example: A DPW admin adds a conditional fee field, tests it in Test Mode, and pushes it live — no ticket filed.

MASTERY

Lead it across departments

Staff train colleagues, diagnose issues, and drive adoption across a fragmented multi-department environment.

SF example: A PermitSF champion walks Planning and DBI through linking their records — without OpenGov in the room.

WHERE PERMITSF LANDS — AND WHERE IT GOES FROM HERE

L1	L2	L3	L4	L5
Initial Record types live, basic workflows, payments enabled	Managed Auto-assigned workflows, conditional fields, mobile inspections, renewals	Defined Complex fees, multi-entry forms, GIS triggers, standardized reporting	City-led strategy SF-defined workflows, location triggers, API-driven data to city systems	SF-optimized Self-service portal, citizen satisfaction tracking, continuous improvement systems

Blue = directly taught in certification

Green = SF reaches independently after cert

WHAT PERMITSF OWNS AFTER THIS — NO VENDOR TICKET REQUIRED

Any user, group, or permission change

New hire onboarding, departures, access adjustments, group restructuring — done by city admins, same day.

Inspection and renewal operations

Coverage gaps, schedule changes, new inspection types, renewal campaigns — managed by the department that owns the work.

Form and fee updates on any record type

New field, new condition, fee change, document template update — city staff make it, test it, push it live.

Reports when leadership asks

Build, save, and run in-app reports on open permits, inspection status, payments, and cross-department activity — no data request needed.

OpenGov provides enablement and training on new features through Expert Services.

WHAT OPENGOV MANAGES AFTER THIS — REQUIRED VENDOR TICKET

BACK-END INTEGRATIONS

Finance export updates, most MAT changes, creating/updating Location Flags, and Autofill Integrations, including the scheduled run time of these integrations..

AUTOMATIC WORKFLOW LOGIC

Changes to Validated Review, Ownership Info Population, First Year Free, and Automated Intake Review processes.

SUPER USER ACCESS

Template store, edit/delete inspection results, Restore deleted record types/departments

EXPANDED COMPLIANCE CONTROL**

Names added, removed, or modified from the ECC list that is used in the Validate Review Logic and the Automated Intake Review process.

***The current SLA for updates is 4 business hours from receipt of request. The City will have full control and ownership to maintain the ECC list once productized in 3 months.*

OpenGov | Inspection Standards & Best Practices

November 2025

Executive Summary

This white paper outlines OpenGov’s recommended approach for the City and County of San Francisco (CCSF) to standardize inspections and permitting practices through three guiding pillars:

1. **Industry Best Practices** – establishing consistency, transparency, and accountability across inspection divisions;
2. **San Francisco Controller’s Office Report ([2021 Preliminary Assessment](#)) ([2025 Internal Audit Final Report](#))** – reinforcing audit integrity, ethical oversight, and role-based authority;
3. **OpenGov Platform Capabilities** – enabling automation, logic-driven processes, and audit-logged transparency.

These recommendations reflect San Francisco’s continued commitment to institutional reform following the Controller’s Public Integrity Review and Internal Audit findings. Together, they outline a clear path to modernize the City’s inspection and permitting framework through a single, transparent system of record grounded in ethics, accountability, and standardization.

Theme 1 | Inspections: Ethics, Accountability & Standardization

Summary

Inspections represent one of CCSF’s most public-facing points of accountability. Industry standards and Controller guidance both emphasize transparency, equity, and auditability in how inspections are requested, routed, conducted, and recorded. OpenGov supports these standards through automation, role-based permissions, and traceable workflows.

Scheduling, Routing & Assignment

Industry & Controller Standard

Most jurisdictions require online inspection scheduling and use structured AM/PM blocks to balance workloads. Assignments are made based on objective criteria—district, trade, and availability—and routing changes require supervisory approval to prevent conflicts of interest.

OpenGov Recommendation

OpenGov’s **Public Portal** enables applicants to schedule inspections online, ensuring timestamped, equitable queueing.

- Applicants select inspection types and time blocks.
- Smart routing through Groups distributes inspections by trade and geography.
- Supervisors manage exceptions and overrides; all changes are logged in the activity tracker.

This configuration ensures consistent scheduling, transparent workload management, and ethical routing across all inspection divisions.

Reassignment & Authority

Industry & Controller Standard

Reassignment authority should rest solely with senior staff to maintain accountability and prevent bias or favoritism. All reassignments must be documented.

OpenGov Recommendation

OpenGov's **permissions and Inspection module** will allow only senior CCSF staff to reassign inspections. Every change automatically records who made it, when, and why. This approach ensures **ethical transparency, equitable workloads, and public trust** in the inspection process.

Reinspection Fees & Triggers

Industry & Controller Standard

Reinspection fees should be charged only when defined triggers are met (e.g., no-show, incomplete work, repeat failure) and not at inspectors' discretion.

OpenGov Recommendation

- Configure rule-based **automated triggers** for reinspection fees.
 - Monitor fee frequency and trends through dashboards for consistency. This minimizes subjectivity and enforces predictable, transparent fee application across divisions.
-

Documentation & Evidence (Checklists, Photos, Job Cards)

Industry & Controller Standard

Documented evidence, including checklists, photos, and electronic reports, ensures consistency and traceability. Physical job cards are outdated.

OpenGov Recommendation

- Implement **inspection checklists** per inspection type.
- For Phase 1, encourage **photo** uploads where concealment, life-safety, or code compliance require verification. For Phase 2, consider requiring photo uploads for certain permit and inspection types.

- **Job Cards:** Eliminate physical job cards. Permits, displayed onsite per code, serve as the official record and are available digitally in OpenGov as part of the CCSF’s shift away from paper-based processes.
 - To preserve the public-facing value of job cards, include a **QR code on posted permits** that links directly to the corresponding record in the OpenGov Public Portal. This allows residents and stakeholders to confirm authorization and project status in real time.
- **Note on printing options:** All OpenGov documentation—including permits, inspection reports, and checklists—can be printed if physical copies are desired or required for field or archival use.

This approach replaces paper-based workflows with verifiable, accessible, and ethically transparent digital records, aligning with Controller recommendations for consistent documentation and public accountability.

Inspection Record Integrity

Industry & Controller Standard

Inspectors must document every inspection stage individually; “batch passing” multiple stages in one click undermines transparency and accuracy.

OpenGov Recommendation

OpenGov enforces step-by-step completion of inspection stages.

- Require inspectors to pass or fail each stage explicitly.
- Capture notes, photos, and timestamps automatically.
- QA/QC dashboards allow supervisors to review skipped or incomplete entries.

This ensures auditability, consistent documentation, and protection against data manipulation.

Accountability and Scheduling for Multi-Permit Sites

Industry & Controller Standard

Each permit represents an independent authorization for specific, permitted work. When a contractor holds multiple adjacent permits—such as for separate condo units—each permit must follow its own inspection workflow to preserve the integrity of project records and accountability for each approved scope.

The inspection request and scheduling process should clearly communicate to both applicants and inspectors that each permit requires a separate inspection request. However, process should allow for (and supervisory staff may coordinate) routing efficiencies (i.e., scheduling multiple inspections in one site visit) when this does not compromise record accuracy, public transparency, or the independence of each permit's workflow.

OpenGov Recommendation

OpenGov recommends maintaining the independence of each permit record while using system functionality to promote scheduling efficiency and transparency.

- **Separate Requests, Unified Experience:** Each permit requires its own inspection request within OpenGov. Applicants must submit inspection requests for each permit individually, even for adjacent units or identical scopes of work. Clear portal guidance and messaging should reinforce this expectation.
- **Supervisor Coordination for Efficiency:** When an inspector is already on-site and the contractor requests an additional inspection for an adjacent permitted area, the inspector should contact the inspection supervisor. The supervisor may approve and assign the additional inspection in OpenGov so both can be performed during the same visit but documented under their separate permit records.
- **Routing and Workload Optimization:** OpenGov's smart scheduling and grouping logic can be configured to help supervisors identify opportunities to route multiple inspections by location or contractor, improving travel efficiency while preserving audit separation between records.

- **Audit and Accountability:** Each inspection remains tied to its respective permit ID, checklist, and final report. All actions—requests, approvals, and reassignments—are tracked in OpenGov’s audit trail for full visibility.

This configuration preserves compliance integrity and ethical accountability, while enabling CCSF to deliver efficient, customer-focused service supported by automated routing and transparent recordkeeping.

Inspector District Design & Equity

Industry & Controller Standard

Districts should reflect equitable caseloads and travel efficiency, not identical maps across trades.

OpenGov Recommendation

Use OpenGov **Groups** to organize flexible, data-driven districts.

- Configure routing based on workload metrics and location.
- Conduct annual reviews of district balance.
- Audit all reassignment activity automatically.

This achieves equitable inspection distribution citywide and supports transparent workload oversight.

To measure equity and ensure oversight, OpenGov provides in-app reporting, activity tracking, data exports and access to data that can be used to create ongoing queries and reports to flag reassignments, inconsistencies, and inspections patterns, as needed.

Theme 2 | Permit Integrity & Change Control

Summary

Permit integrity safeguards CCSF’s public record and ethical obligations. The Controller’s audit highlighted the importance of managing revisions and data

changes within strict, auditable boundaries. OpenGov replaces manual controls with real-time audit trails and defined change types.

Revision & Reopening Policies

Industry & Controller Standard

Revisions should occur only under documented procedures—minor changes through resubmittal, major changes through new or revision permits. Supervisors must authorize all reopenings.

OpenGov Recommendation

OpenGov recommends a standardized and conservative approach to change control that allows only limited, tracked edits once a record has been submitted. This aligns with CCSF's goals of ethics, accountability, and standardization by ensuring staff follow transparent, role-based processes that prevent undocumented changes.

OpenGov functionality enables intake reviewers, plan reviewers, and inspectors to operate within a defined standard operating procedure that minimizes the need for manual edits after submission. For example, inspectors can update checklist items and status of each component before finalizing an inspection report, creating a complete, versioned record without re-entry or overwrite.

To maintain data integrity and ethical oversight, OpenGov recommends utilizing the following features and permissions-based processes:

- **Request Changes** – Used for minor applicant edits (e.g., typos, attachments) during intake and review. This feature allows CCSF users to return a record to the applicant with timestamped tracking and version control.
- **New Submission** – Required for material scope changes. Applicants should submit a new record, and the original, superseded application should be moved to “Stopped” status to preserve the audit trail.
- **Reinstate Permit** – An optional ad hoc workflow step available only to senior staff through user defined permissions. This function applies to narrowly

defined situations (e.g., recently expired or suspended permits) and automatically records every user action in the activity tracker.

- **Supervisor Correction** – Based on defined user permissions, supervisor correction for verified errors within policy limits, may also be used. The in-app activity tracker creates an audit trail of each click related to these corrections.

Beyond these cases, no edits should occur. All changes are logged with user and timestamp, reviewed, and auditable, modernizing the SF Controller’s 48-hour lock into a real-time, user permission-driven accountability model.

Inspection-Stage Corrections

Industry & Controller Standard

Post-inspection data corrections require supervisory approval and documentation to prevent record tampering.

OpenGov Recommendation

- Inspectors record all outcomes through dropdowns (Pass/Fail/Partial).
- Supervisors may correct errors within a defined window; all changes are logged.
- After that window, corrections must occur via a **subsequent inspection report** or **new permit**.

This ensures ethical recordkeeping and prevents unauthorized data edits.

Handling Violations & Enforcement Holds

Industry & Controller Standard

Applications may continue through review even when a violation exists, but issuance is paused until compliance is achieved.

OpenGov Recommendation

Use conditional workflow logic to:

- Flag active violations.
- Trigger an **Enforcement/Resolution** workflow step before processing continues.
- Display contextual help text notifying applicants of the hold and next steps.

This maintains consistency across departments while ensuring compliance actions are tracked transparently. Additionally, this process ensures no permits are issued to applicants or locations with active violations.

Theme 3 | Governance & Oversight

Summary

Governance ensures CCSF's inspection and permitting systems operate with integrity and measurable accountability. OpenGov's automated audit logs, QA/QC dashboards, and role-based permissions support continuous ethical oversight.

QA/QC Tracking

Industry & Controller Standard

Supervisors should review inspection results regularly to ensure accuracy and completeness.

OpenGov Recommendation

Deploy **QA/QC dashboards** to monitor inspection outcomes, reinspection rates, and reassignment activity. This replaces manual reviews with data-driven oversight and early anomaly detection. To support data-driven oversight and a proactive mindset, OpenGov provides in-app reporting, activity tracking, data exports and access to data that can be used to create ongoing queries and reports to flag inspection related actions.

Audit Logs & Transparency

Industry & Controller Standard

All changes to permitting and inspection records must be traceable, reviewable, and attributable—including who made the change, when it occurred, and what was modified. Transparent change tracking is essential for maintaining ethical accountability, data integrity, and public trust.

The Controller's report emphasized that incomplete audit controls and post-entry edits created risk for unauthorized modifications. Best-in-class jurisdictions mitigate this by maintaining immutable audit trails accessible to supervisors for proactive monitoring and performance review.

OpenGov Recommendation

The Controller's report recommended implementing a 24–48-hour data lock to prevent unauthorized edits after inspection entry. OpenGov improves on this standard by replacing time-based restrictions with real-time, role-based audit controls.

Every action taken in OpenGov—whether by intake staff, inspectors, or supervisors—is automatically captured in the activity tracker, creating a complete, click-by-click audit log. Instead of waiting for a lock window to expire, records are instantly secured once finalized, while authorized supervisors can still make verified corrections that are fully logged and reviewable.

To support data-driven oversight and proactive compliance, OpenGov provides configurable in-app reporting, activity tracking, data exports, and access to data that can enable supervisors to monitor edits, generate queries, and analyze trends. This transforms the Controller's lock concept from a static safeguard into a continuous, transparent system of accountability.

Public Visibility of Inspection Comments

Industry & Controller Standard

Inspection comments are public records under California law, but most jurisdictions restrict detailed narrative access to applicants to protect privacy, security, and sensitive building information. Typically, only applicants and authorized agents can view full comments, while the general public accesses summaries or requests detailed records through formal processes.

OpenGov Recommendation

OpenGov's configuration supports CCSF's commitment to both **transparency and data integrity** through customizable access settings:

- **Applicant Access:** Applicants and authorized guests can view complete inspection comments, results, and attachments through the OpenGov Public Portal as part of their active records.
- **Records Requests:** Members of the public may still obtain full inspection details via CCSF's formal records request process, ensuring proper review and redaction.

This approach aligns with the Controller's recommendations for consistent disclosure practices by making public data **searchable, standardized, and secure**, while maintaining clear ethical boundaries between applicant-level visibility and public access. OpenGov provides data exports and access to data that can be used to display inspection-related data more publicly.

Conclusion

By aligning industry standards, Controller oversight expectations, and OpenGov functionality, CCSF can strengthen ethics, accountability, and standardization across inspections and permitting.

Automated, role-based, and auditable workflows will create a transparent system of record that protects the public interest, reinforces staff accountability, and maintains public trust.

These recommendations directly advance the Controller's call for stronger internal controls and an ethical "tone at the top," embedding transparency and accountability into daily operations and sustaining a culture where integrity is continuously measured.