Budget & Performance Subcommittee
2026 Kick-Off Meeting
January 30, 2026

Agenda

1. Call to Order by Chair
2. Roll Call
3. General Public Comment
4. Department Updates and Announcements
5. Approval of the Meeting Minutes from September 12, 2025
6. Update on FY2026-28 Technology Project Proposals & Expectations
7. Adjournment

Item Number 3

General Public Comment

Discussion Item

Item Number 4

Department Updates and Announcements

Discussion Item

Item Number 5

Approval of meeting minutes from September 12, 2025

Action Item

Item Number 6

Update on Fiscal Year 2026-2028
Technology Project Proposals & Expectations

Discussion Item

Welcome to Budget & Performance Kick-Off

Today we will be summarizing 2025 outcomes and planning for

2026 budget recommendations to the Mayor's Office

SUPPORT
EVIDENCED BASED
DECISION-MAKING

FOCUS ON
BUDGET BASED
OUTCOMES

Fiscal Year 2025-27 Financial Commitments

Dept	COIT Project Title	FY2025-26	FY2026-27
ADM	Cloud Telecom Upgrade	275,000	-
ADM	Unified Data Platform	310,000	883,000
ADM	ASTRID	675,000	675,000
ADM	Digital Accessibility (Sf.gov)	680,000	700,000
ASR	Property Assessment and Tax System	1,560,000	-
BOS	Legislative Management System	2,000,000	-
CON	Financial Reporting Automation	200,000	200,000
CON	SF Reports and Analytics	200,000	200,000
DEM	Finance Payment	3,739,872	1,875,436
DEM	DEM CAD Replacement- Scoping	6,600,000	13,215,000
DHR	HRD Onboarding-Digital Record	430,000	450,000
DHR	HRD Intranet-Employee Portal	1,570,000	1,620,000
DPA	Cloud migration	545,000	-
HSS	HT Benefits Admin Process	100,000	100,000
HSS	HT PeopleSoft eBenefits	100,000	100,000
SHF	SH Jail Monitoring System JMS	2,500,000	1,000,000
TIS	JUSTIS	50,000	50,000
TIS	DT DR for Critical City Apps	50,000	50,000
TIS	DT Generative AI	500,000	1,040,000
TIS	City Cloud Enhancement	640,000	1,050,000
TIS	Telecom - VOIP Project	1,070,000	1,300,000
TTX	TTX - Business Tax Application	1,500,000	-
Total		**25,294,872**	**24,508,436**

Submission comparison between 2025 & 2026

Category	January 2025 (FY25 - 27)	January 2026 (FY26 - 28)
Total Projects Submitted (COIT & Self-funded)	106	62
Total Project Cost (COIT & Self-funded)	$123 million	$70 million
Projects Requesting COIT funding	39	36
COIT Request Only	$101 million	$48 million
Self-Funded Projects Only	40	8
Self-Funded Fund Request Only	$22 million	$22 million

Process Improvements for 2026

Background: Based on the subcommittee's input and feedback in 2025, COIT staff developed guardrails to establish a more comprehensive evaluation system for technology investments that ensure consistent, strategic, and financially responsible decision-making across all city departments.
COIT staff introduced revised budget instructions to departments.

Revised Budget Instructions	
In the Past	**New Updates**
No list of active projects with details beyond budget	Depts must submit all active technology projects.
Threshold for technology projects was $100,000	The threshold for technology projects is now $500,000
Limited standardization & definitions for project proposals	Introduced standards for tech proposals to ensure consistent reporting across all IT projects

New Standardized Requirements

- All proposals must include a problem statement and solution
- Depts must classify projects to the new four-level scale (next slide)
- Depts must submit a detailed project management plan
- Depts develop an ongoing maintenance and support structure that focuses on operationalizing costs
- Depts identify compliance requirements and create a policy framework for implementation
- Detail all potential expenses for visibility into how funds will be utilized
- Create a project schedule that includes a comprehensive and realistic timeline
- Depts clearly document key assumptions, constraints, and risks underlying the project plan
- Depts create a contingency framework to address potential issue types

Organizational Structure & Method

Background: This year, departments propose projects based on levels of complexity to ensure appropriate resource allocation and oversight. Since departments must classify proposed projects according to the four-level complexity scale shown below, this year the meetings will be organized based on this structure with Level (1) being the first to present to the committee.

Level 1: Simple (< $500K, < 6 months)
- Single Department Impact
- Minimal integration requirements
- Standard procurement processes
- Low technical risk

Level 2: Moderate ($1M - $1.5M, 6-12 months)
- Multi-department coordination
- Moderate system integration
- Custom configuration required
- Medium technical/operational risk

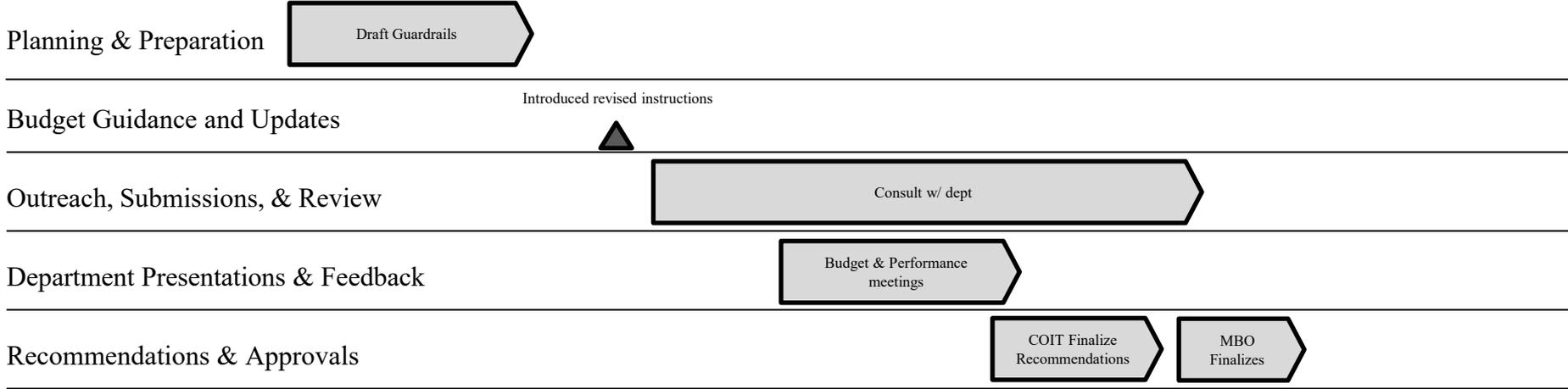**Level 3: Complex ($1.5M - $3M, 12-24 months)**
- Enterprise-wide impact
- Significant system integration
- High stakeholder coordination
- Custom Development

Level 4: Transformational (>$3M, +24 months)
- City-wide transformation
- Legacy system replacement
- Extensive change-management
- Critical infrastructure impact

Timeline and Funding Levels

Activity	Sept 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Apr 2026	May 2026	Jun 2026

Planning & Preparation — Draft Guardrails

Budget Guidance and Updates — Introduced revised instructions

Outreach, Submissions, & Review — Consult w/ dept

Department Presentations & Feedback — Budget & Performance meetings

Recommendations & Approvals — COIT Finalize Recommendations / MBO Finalizes

As we begin to listen to department presentations, please keep in mind the 5-Year Financial Projection for COIT funding.

CY2025-26	FY2026-27	FY2027-28	FY2028-29	FY2029-30
$25.3M	$29.5M	$32.5M	$35.7M	$39.2M

Thank you!

Item Number 7

Adjournment