

# County IT Projects

## Quarterly Progress Report

1<sup>st</sup> Quarter, FY 25-26  
Jul 1 – Sep 30, 2025



The Quarterly OC Information Technology (OCIT) Project Progress Report provides the status of all County IT projects with a budget of \$150,000 or more and/or that have been identified as meriting the Board of Supervisors' attention.

The IT projects included in this report reflect the County's ongoing commitment to align IT with the County's business values. Projects included in the portfolio cover the upgrade or replacement of aging infrastructure and end-of-life systems and investment in new, innovative, and reliable technology and platforms. These projects also enhance the County's ability to maintain critical business operations, improve productivity, and deliver more and better services to constituents.

In addition to project status updates, this report also describes the County's IT overall project performance trends over the last 12 quarters.

## Highlights



### At a Glance

The number of projects in this reporting period is 10, five less than the number of projects reported in the previous quarter. Five projects were completed last quarter: Microsoft 365 Copilot Proof of Concept (OCIT); Privileged Access Management (PAM) Replacement (OCIT); CompassOC (Office of Care Coordination); Employee Information Tracking System (EITS) (Social Services Agency); and Mandated Reporter App (MRA) (Social Services Agency). No new projects were added this quarter. The total budget decreased from \$88,576,018 to \$85,766,538.



### Key Accomplishments

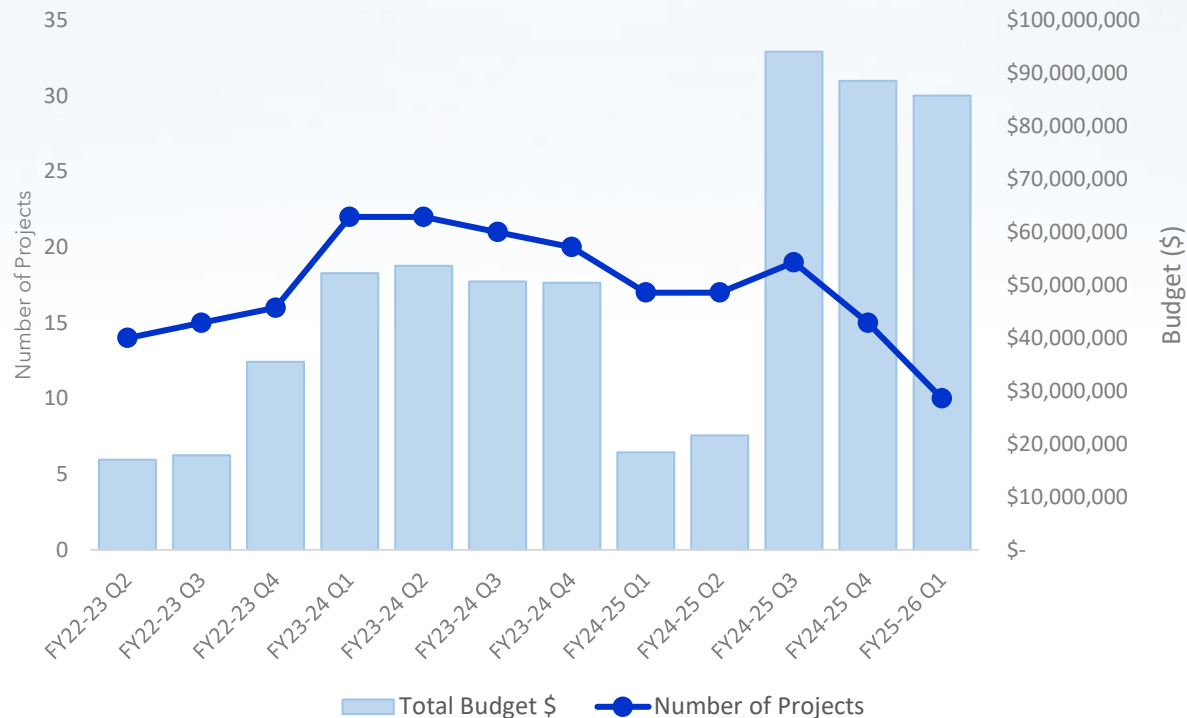
Two projects were successfully completed in FY25-26 Q1: Access Control Conversion (OCIT) and Virtual Private Network (VPN) Solution Expansion (OCIT).

# IT Portfolio Size and Budget

Attachment A



This chart depicts the County's IT project portfolio size and budget trends over the last 12 quarters.

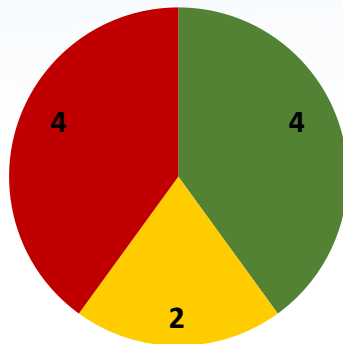


- The number of active projects is 10, five less projects than reported in the previous quarter.
- Project data from the last 12 quarters show an average of 17 and a median of 17 projects.
- The total portfolio budget decreased by \$2,809,480.

*The chart above reflects projects that were active or completed during each quarter.*

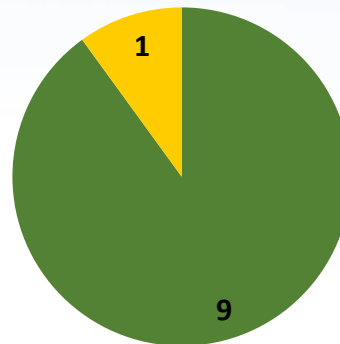
The charts below depict the County's IT project portfolio schedule and budget performance of the active and completed projects during the reporting period.

## Schedule



- On Schedule
- At risk; 10% - 20% over schedule
- Critical; >20% over schedule

## Budget



- On Budget
- At risk; 10% - 20% over budget
- Critical; >20% over budget

During this reporting period, six projects experienced schedule delays of more than 10%, and one project exceeded its original or rebaselined budget by more than 10%. Details concerning schedule delays are available in the IT Project Dashboard included with this report.

Scope changes and project dependencies are the primary contributors to project schedule delays and budget overages.

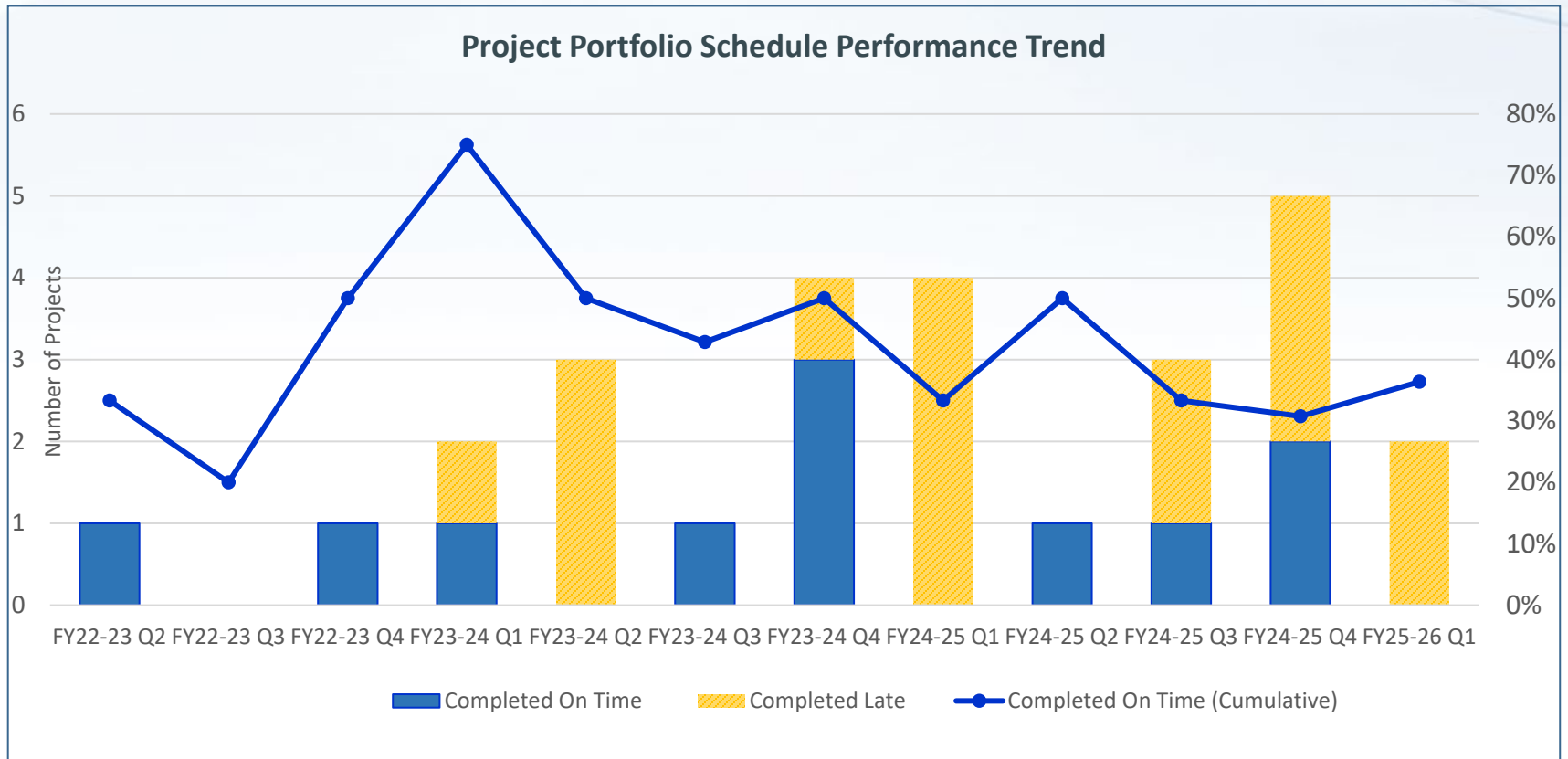
# Portfolio Performance Trend

Attachment A

The chart below depicts the County's IT project schedule performance trend for the projects that were completed over the last 12 quarters.

The bars reflect the total number of projects completed in each quarter and the number completed on schedule.

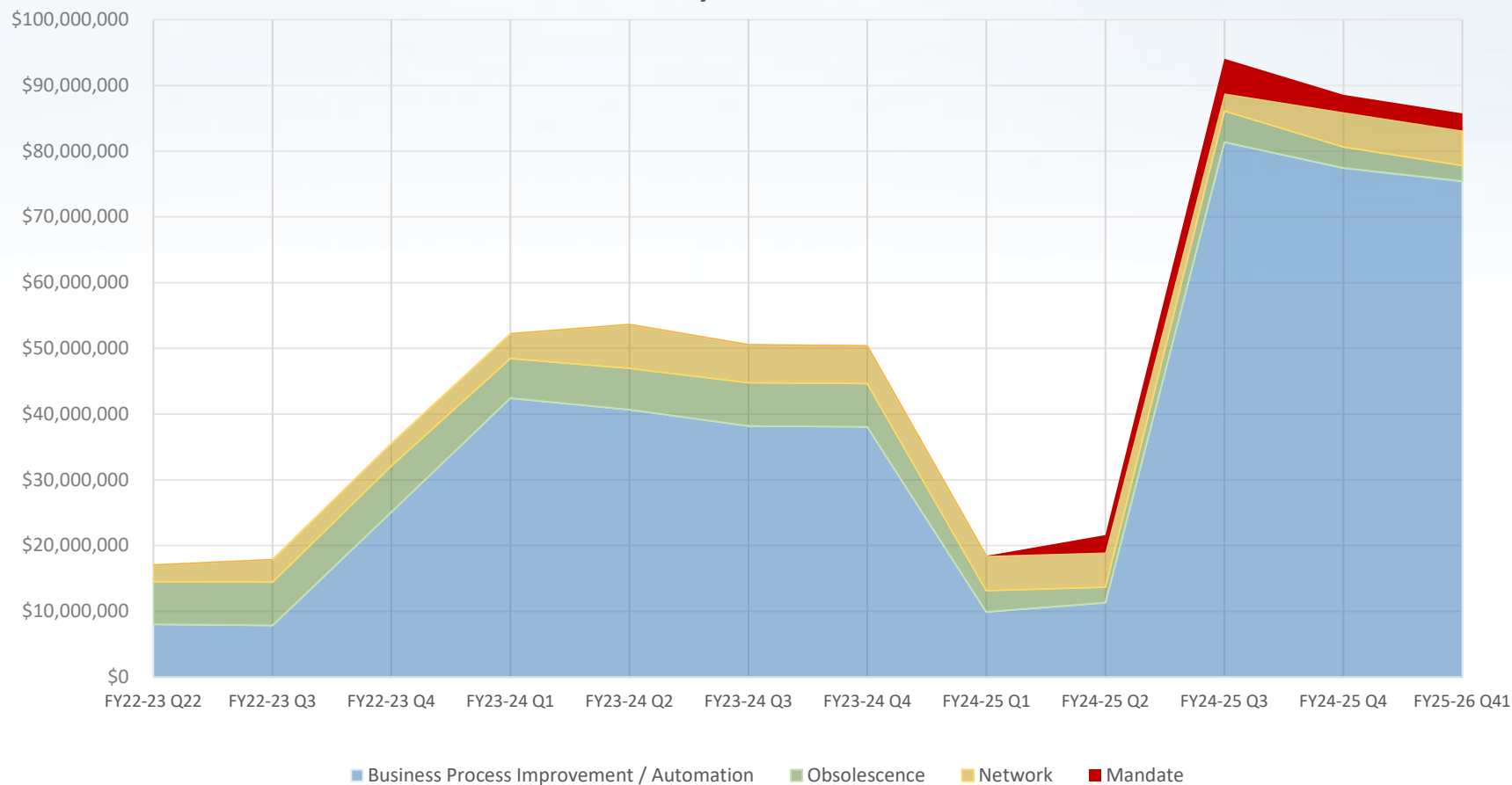
The line reflects the percentage of projects completed on schedule over four consecutive quarters.



This portfolio budget performance trend may reflect the County's cost-schedule tradeoff decisions to stay within resource and budget constraints at the expense of schedule.

Projects intended to improve or automate business processes account for 87.96% of the County's IT budget this quarter. Projects for replacing end-of-life or obsolete systems account for 2.80% of the budget. Network projects account for 6.16% of the budget. Mandated systems account for 3.08% of the budget.

## Investment by Business Justification



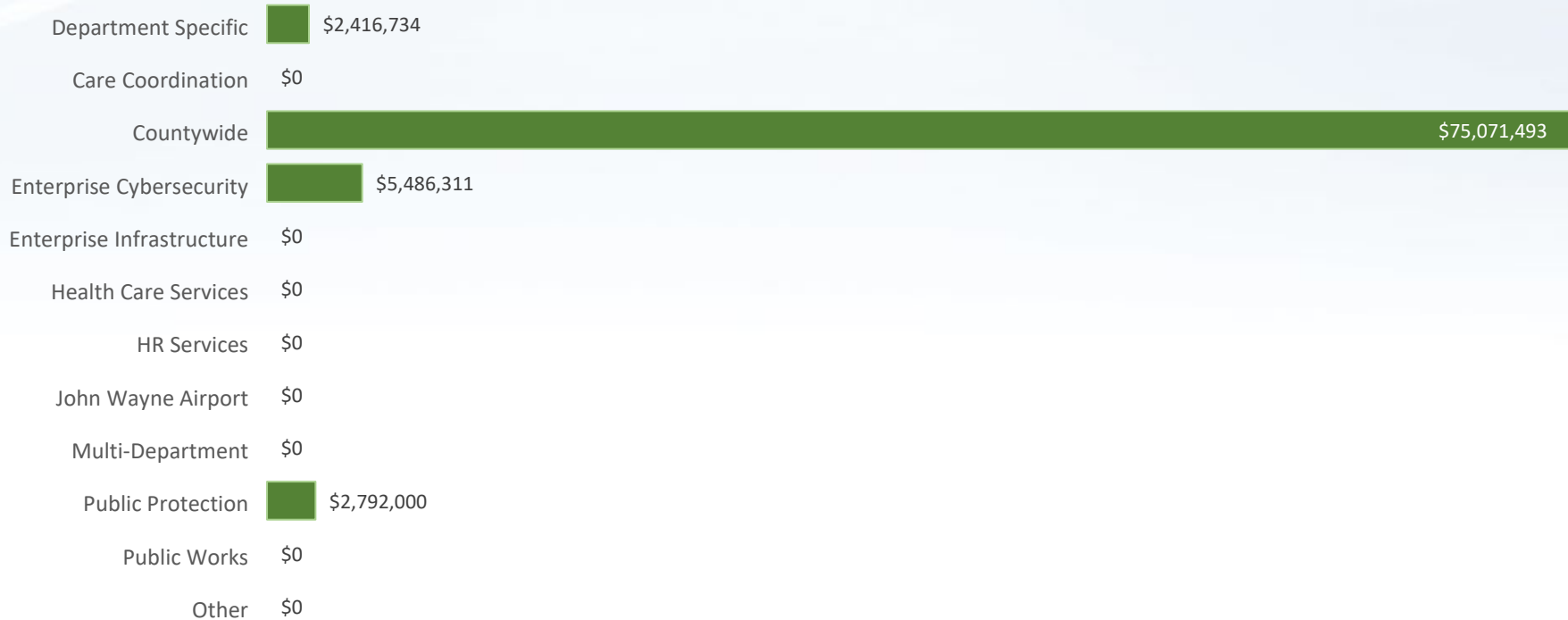
*The chart above reflects projects that were active or completed during each quarter.*

# Investment by Service Area

Attachment A



Countywide projects, which include ERP, account for the largest share of the County's IT project investments this quarter. Enterprise Cybersecurity, Department Specific, and Public Protection projects show significantly less investment as compared with countywide projects.



*The chart above reflects projects that were active or completed during this reporting period.*

# IT Project Dashboard

Attachment A



Managing Dept.	Business Owner	Project Description	Budget	Schedule	Schedule / Budget	Project Phase - Status as of End of Reporting Period Key Highlights Since End of Reporting Period	% Completed
A-C	Multi	<b>ERP Transformation and Modernization</b> - Project will implement an integrated cloud-based ERP System, increase operational automation and efficiency throughout the County, improve collaboration, streamline business processes, strengthen security and workflow, enhance internal controls, and maximize the latest technological innovations. The project includes multiple releases for the business components stated in the key milestones.			Planned Start: 03/11/25 Planned End: 07/31/28  Budget: \$ 70,960,433 Expended: \$ 1,634,206 Encumbered: \$ 2,368,037 Balance: \$ 66,958,190  Source: General Fund	<p><b>Execution</b> - Conducted user acceptance testing (UAT), end-to-end testing, finalized and migrated data to production, Release 1A go-live 9/29/25. Began design phase for Release 1B. Completed design phase for release 1C; reviewed two-phased budget system rollout approach. Finalized Chart of Accounts structure and completed design phase for Release 1D. Release 1E design phase in progress. Conducted Oracle training sessions; received and completed questionnaires; completed prepare phase for Release 2A. Conducted Organizational Change Management (OCM) information sharing sessions with County stakeholder groups. Sent initial countywide communication and launched project information website. Collected change impacts from design workshops.</p> <p>In next period, to complete sign-off of deliverables for Release 1A. Continue design phase for Release 1B; initiate delivery (build) phase and system configuration and initiate mock data conversions for Releases 1C and 1D; finalize design phase and initiate delivery (build) phase; initiate system integrations for Release 1E; start design phase for release 2A; continue regular information sharing sessions, identify change agents/super users and continue collecting and validating change impacts for OCM.</p> <p><b>Risk Mitigation</b> N/A</p>	7%
OCIT	COB	<b>OC Agenda Rewrite</b> - In-house development of Agenda Management solution to include all stages of the agenda process lifecycle (creation of ASRs, compiling ASRs/publishing agendas, post meeting minutes processes, archiving and search).			Planned Start: 06/01/24 Planned End: 05/15/26  Budget: \$ 2,400,935 Expended: \$ 1,069,943 Encumbered: \$ 0 Balance: \$ 1,330,992  Source: General Fund	<p><b>Execution</b> – Continued work on requirements confirmation; continued development of ASR workflows and Collaboration; continued development of Agenda Management and Post-Meeting Activities; conducted QA testing of delivered functionality; began UAT for ASR functionality.</p> <p>In next period, to finalize all requirements confirmation activities; continue development of Agenda Maintenance and Post-Meeting Activities; continue QA testing of delivered functionality; begin UAT of COB functionality; begin creation of training materials and training plan/schedule.</p> <p><b>Risk Mitigation</b> - Existing system is on outdated hardware and software; contingency plan is to require vendor to fix system and/or provide minimally viable replacement system.</p>	45%

List is ordered by Managing Dept., then by Business Owner.

\* Project has been rebaselined.

\*\* Project will be baselined after initiation or procurement activities are complete.



On track; within 10% of budget/schedule



At risk; 10% - 20% over budget/schedule



Critical: >20% over budget/schedule



# IT Project Dashboard

Attachment A



Managing Dept.	Business Owner	Project Description	Budget	Schedule	Schedule / Budget	Project Phase - Status as of End of Reporting Period Key Highlights Since End of Reporting Period	% Completed
OCIT	Multi	<b>Access Control Conversion</b> - Migrate identified County badge system components to a new platform to reduce material and licensing costs and improve maintenance support channels.			Planned Start: 02/01/23 Planned End: 06/24/24 12/31/24 05/31/25 06/15/25 07/31/25  Budget: \$ 448,665 \$ 648,665 \$ 808,664 Expended: \$ 736,773 Encumbered: \$ 51,444 Balance: \$ 20,487  Source: General Fund	<b>Closing</b> - Completed cutover to new system of an additional 16 sites; all sites now cut over. Remaining tasks and project closeout activities complete.  <u><b>Risk Mitigation</b></u> N/A	100%
OCIT	Multi	<b>County Enterprise Network Redundancy</b> - The purpose of this project is to upgrade and enhance the County network infrastructure in the County Administration South (CAS) building to build additional redundancy in case of network or internet service failure at the Orange County Data Center (OCDC).	*		Planned Start: 10/10/22 Planned End: 05/02/23 10/15/23 06/30/24 11/04/24 05/30/25 11/30/25  Budget: \$ 2,517,647 Expended: \$ 1,998,531 Encumbered: \$ 0 Balance: \$ 519,116  Source: General Fund, OCIT	<b>Execution</b> – Redundancy implementation and documentation near completion; installation and configuration of ISE node complete.  In next period, complete documentation and redundancy implementation (internet redundancy from OCDC to CAS failover testing).  <u><b>Risk Mitigation</b></u> - Work Order amendment with SAIC extends end date to 11/30/2025. Allows time for completion of prerequisite firewall projects.	93%

List is ordered by Managing Dept., then by Business Owner.

\* Project has been rebaselined.

\*\* Project will be baselined after initiation or procurement activities are complete.



On track; within 10% of budget/schedule



At risk; 10% - 20% over budget/schedule



Critical: >20% over budget/schedule

# IT Project Dashboard

Attachment A



Managing Dept.	Business Owner	Project Description	Budget	Schedule	Schedule / Budget	Project Phase - Status as of End of Reporting Period Key Highlights Since End of Reporting Period	% Completed
OCIT	Multi	<b>OC.GOV Migration</b> - The State of California passed a new law, AB1637, that requires all California cities, counties, and local agencies that maintain an internet website for use by the public or maintains public email addresses to utilize a “.gov” top-level domain for their websites and email addresses by January 1, 2029. During this project, all County agencies’ external facing websites and email addresses will be migrated from the OCGOV.COM domain to the OC.GOV domain.			Planned Start: 07/15/24 Planned End: 11/29/28  Budget: \$ 1,710,125 Expended: \$ 316,105 Encumbered: \$ 0 Balance: \$ 1,394,020  Source: Participating Departments	<b>Execution</b> - Completed email, shared mailbox, and website migrations for CEO, Assessor, County Counsel, Internal Audit, OC Ethics, and Office of Independent Review.  In next period, to complete migrations of email, shared mailboxes, and websites for District Attorney, Clerk of the Board, and Board of Supervisors.  <u><b>Risk Mitigation</b></u> N/A	15%
OCIT	Multi	<b>Multi-Factor Authentication (MFA) System</b> - This project expands the County's current Multi-Factor Authentication (MFA) with an enterprise level solution, to includes badge readers and hardware tokens, to significantly improve security and user experience.			Planned Start: 11/01/24 Planned End: <del>06/30/25</del> 03/31/26  Budget: \$ 930,000 Expended: \$ 460,050 Encumbered: \$ 99,156 Balance: \$ 377,764  Source: General Fund	<b>Execution</b> - Project resumed; hardware and software issues resolved by vendor. Proceeded with Probation and Treasurer-Tax Collector rollouts; initiated OC Community Resources licensing purchases.  In next period, to complete rollout for OC Community Resources; initiate rollout for next Shared Services agency.  <u><b>Risk Mitigation</b></u> Time to complete extended due to need for vendor to resolve hardware/software issues.	55%

List is ordered by Managing Dept., then by Business Owner.

\* Project has been rebaselined.

\*\* Project will be baselined after initiation or procurement activities are complete.



On track; within 10% of budget/schedule



At risk; 10% - 20% over budget/schedule



Critical: >20% over budget/schedule

# IT Project Dashboard

Attachment A



Managing Dept.	Business Owner	Project Description	Budget	Schedule	Schedule / Budget	Project Phase - Status as of End of Reporting Period Key Highlights Since End of Reporting Period	% Completed
OCIT	Multi	<b>Virtual Private Network (VPN) Solution Expansion</b> – This project seeks to consolidate the multiple VPN solutions within the County into a single platform, a next-generation VPN alternative that gives users direct connectivity to County applications in contrast to traditional VPNs that provide access at the network level. This significantly enhances security as it minimizes the attack surface and introduces the concept of zero-trust network access.			Planned Start: 02/01/23 Planned End: 09/30/23 <del>11/24/23</del> 12/31/24 01/15/25 03/31/25 05/30/25 07/31/25  Budget: \$ <del>890,000</del> \$ 1,230,000 Expended: \$ 1,398,533 Encumbered: \$ 0 Balance: \$ (204,642)  Source: General Fund, OCIT	<b>Closing</b> – Final rollout completed for OC Waste & Recycling. Project complete.  <u><b>Risk Mitigation</b></u> Schedule delays and budget overages due to additional scope and reprioritization of rollouts.	100%

List is ordered by Managing Dept., then by Business Owner.

\* Project has been rebaselined.

\*\* Project will be baselined after initiation or procurement activities are complete.



On track; within 10% of budget/schedule



At risk; 10% - 20% over budget/schedule



Critical: >20% over budget/schedule

# IT Project Dashboard

Attachment A



Managing Dept.	Business Owner	Project Description	Budget	Schedule	Schedule / Budget	Project Phase - Status as of End of Reporting Period Key Highlights Since End of Reporting Period	% Completed
OCIT	PROB	<b>Juvenile Hall Switch Migration</b> - The purpose of this project is to provide an assessment of the current switch Network design and configuration at the Orange County Probation Department Juvenile Hall, upgrading the video network systems, and migrating the existing services to ongoing managed support.	*	*	Planned Start: 09/09/24 Planned End: 01/17/25 01/19/26 Budget: \$ 1,536,570 Expended: \$ 1,547,425 Encumbered \$ 0 Balance: \$ (10,855) Source: Probation	<p><b>Execution</b> - Continued work on network assessment, discovery, and planning; 78% complete for these activities.</p> <p>In next period, to continue working on network assessment, discovery, and planning; network staging-configuration and validation testing at OCDC; network migration; and network documentation, all pending OCIT/OCPW equipment delivery. Network documentation to be updated upon completion of migration.</p> <p><b>Risk Mitigation</b></p> <ul style="list-style-type: none"> <li>- A&amp;E design from subcontractor is late; resulted in impact to milestone dates. Issue escalated to OCIT/OCPW.</li> <li>- Subcontractor and OCPW have estimated that requirements may take until Q3 2026 to complete; will estimate new timeline after receiving additional information regarding infrastructure builds.</li> </ul>	16%

List is ordered by Managing Dept., then by Business Owner.

\* Project has been rebaselined.

\*\* Project will be baselined after initiation or procurement activities are complete.



On track; within 10% of budget/schedule



At risk; 10% - 20% over budget/schedule



Critical: >20% over budget/schedule

# IT Project Dashboard

Attachment A



Managing Dept.	Business Owner	Project Description	Budget	Schedule	Schedule / Budget	Project Phase - Status as of End of Reporting Period Key Highlights Since End of Reporting Period	% Completed
OCIT	SSA	<b>Orangewood Children's Information System 2.0 (OCIS2.0)</b> - Orange County Social Services Agency (SSA) is replacing its legacy Orangewood Children's Information System (OCIS) with a web-based application (OCIS2.0) to meet new business needs and enhance daily operational support at the Orangewood Children and Family Center (OCFC). The legacy OCIS application was developed over a decade ago and is near end-of-life. OCIS doesn't have the features, functionality, and reporting necessary to support current business needs: OCIS2.0 will close that gap.			Planned Start: 07/01/24 Planned End: <del>09/30/25</del> 01/21/26  Budget: \$ 880,864 Expended: \$ 552,425 Encumbered: \$ 0 Balance: \$ 327,739  Source: SSA	<b>Execution</b> - Completed Administration module; Roles & Permissions; SSRS report integration; reports.  In next period, to complete test case development; development of newly identified enhancements; cybersecurity review; UAT; end-user training.  <u><b>Risk Mitigation</b></u> N/A	80%

List is ordered by Managing Dept., then by Business Owner.

\* Project has been rebaselined.

\*\* Project will be baselined after initiation or procurement activities are complete.

On track; within 10% of budget/schedule

At risk; 10% - 20% over budget/schedule

Critical: >20% over budget/schedule

# IT Project Dashboard

Attachment A



Managing Dept.	Business Owner	Project Description	Budget	Schedule	Schedule / Budget	Project Phase - Status as of End of Reporting Period Key Highlights Since End of Reporting Period	% Completed
OCSD	OCSD	<p><b>Automated Jail System</b> - Sheriff AIS is a highly customized Jail System that was originally developed in 1990 on a mainframe utilizing Assembly/COBOL programming languages. The new IJMS will be built on current programming languages on commercially available and supported platforms. It will include all of the functional and technical requirements compiled by the IJMS team including Intake/Booking, Inmate Property Management, Inmate Classification, Sentence Calculation, Housing, Visits, Mail, Transitional Services, Inmate Accounts, Incidents, Investigations, Transportation, Movement, Count/Census, Medical/Mental Health, Release, Searches, Grievances, Unit Management, Scheduling, Reporting, Callouts, Food Services, and Inmate Requests.</p>			<p>Planned Start: 10/31/17 12/14/21</p> <p>Planned End: 12/16/22 12/31/24 06/30/25 10/31/25 12/01/25</p> <p>Budget: \$ 2,792,000 Expended: \$ 633,750 Encumbered: \$ 0 Balance: \$ 2,158,750</p> <p>Source: General Fund</p>	<p><b>Execution</b> – Completed migration from SOMA to ServiceNow; developed Jail Core and Inmate Core modules; held client review and acceptance testing sessions; executed initial data migration and AIS cleansing activities; completed integration testing with Guardian RFID.</p> <p>In next period, to continue expanded data migration and final cutover prep for inmate and housing data training and change management planning; begin end-to-end workflow validation with Sheriff's Operations teams; implement advanced reporting dashboard for compliance, grievances, and inmate outcomes; expand ServiceNow app engine modules to cover Classification and Housing logic; prepare for parallel testing and user readiness training ahead of enterprise rollout.</p> <p><b>Risk Mitigation</b></p> <ul style="list-style-type: none"> <li>- Vacant positions.</li> <li>- Scope expansion due to stakeholder input or custom feature requests; define minimum viable project (MVP), manage change requests formally, and enforce sprint discipline.</li> <li>- Resistance to change, operational slows downs, or user errors; deliver targeted training, use simulation environments, and implement change management strategies.</li> <li>- Tight project deadline; tripled project resources to accelerate development and meet schedule.</li> <li>- Interface dependencies.</li> </ul>	80%

List is ordered by Managing Dept., then by Business Owner.

\* Project has been rebaselined.

\*\* Project will be baselined after initiation or procurement activities are complete.



On track; within 10% of budget/schedule



At risk; 10% - 20% over budget/schedule



Critical: >20% over budget/schedule

# Project Landing Map

Attachment A



The map below depicts when project benefits have been or are expected to be realized.

Q1 FY24-25 Jul – Sep 2024	Q2 FY24-25 Oct – Dec 2024	Q3 FY24-25 Jan – Mar 2025	Q4 FY24-25 Apr – Jun 2025
<ul style="list-style-type: none"> <li>✓ eDiscovery Tool</li> <li>✓ Legacy Application Restoration</li> <li>✓ Qualtrics Call Center Analytics</li> <li>✓ Web Property Tax Inquiry &amp; Payment System</li> </ul>	<ul style="list-style-type: none"> <li>✓ Endpoint Security Transition</li> <li>■ Identity &amp; Badge Data Integration (Cancelled)</li> </ul>	<ul style="list-style-type: none"> <li>✓ iConnect Lab Portal</li> <li>■ OC Agenda (Cancelled)</li> <li>✓ Multi-Drug Resistant Organism (MDRO) Data Exchange</li> <li>✓ OC Recycling and Disposal System (RDS)</li> </ul>	<ul style="list-style-type: none"> <li>✓ CompassOC</li> <li>✓ Employee Information Tracking System</li> <li>✓ Mandated Reporter App</li> <li>✓ Microsoft 365 Copilot Proof of Concept</li> <li>✓ Privileged Access Management (PAM) Replacement</li> </ul>
Q1 FY25-26 Jul – Sep 2025	Q2 FY25-26 Oct – Dec 2025	Q3 FY25-26 Jan – Mar 2026	Q4 FY25-26 Apr – Jun 2026
<ul style="list-style-type: none"> <li>✓ Access Control Conversion</li> <li>✓ VPN Solution Expansion</li> </ul>	<ul style="list-style-type: none"> <li>■ Automated Jail System (AJS)</li> <li>■ County Enterprise Network Redundancy</li> </ul>	<ul style="list-style-type: none"> <li>■ Juvenile Hall Switch Migration</li> <li>■ Multi-Factor Authentication (MFA) System</li> <li>■ Orangewood Children’s Information System 2.0</li> </ul>	<ul style="list-style-type: none"> <li>■ OC Agenda Rewrite (May 2026)</li> </ul>
Q1 FY26-27 Jul – Sep 2026	Q2 FY26-27 Oct – Dec 2026	Q3 FY26-27 Jan – Mar 2027	Q4 FY26-27 Apr – Jun 2027 →
			<ul style="list-style-type: none"> <li>■ ERP Transformation and Modernization (July 2028)</li> <li>■ OC.GOV Migration (Dec 2028)</li> </ul>

- On schedule
- 10% - 20% over schedule
- >20% over schedule
- ✓ Project has been completed