

County IT Projects

Quarterly Progress Report

3rd Quarter, FY 25-26
Jan 1 – Mar 31, 2026



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 ten, two more than the number of projects reported in the previous quarter. No projects were completed last quarter. Two new projects were added this quarter: Case Management System (CMS) Replacement (District Attorney) and County Phone System Migration (OCIT). The total budget increased from \$106,452,441 to \$111,826,363.



Key Accomplishments

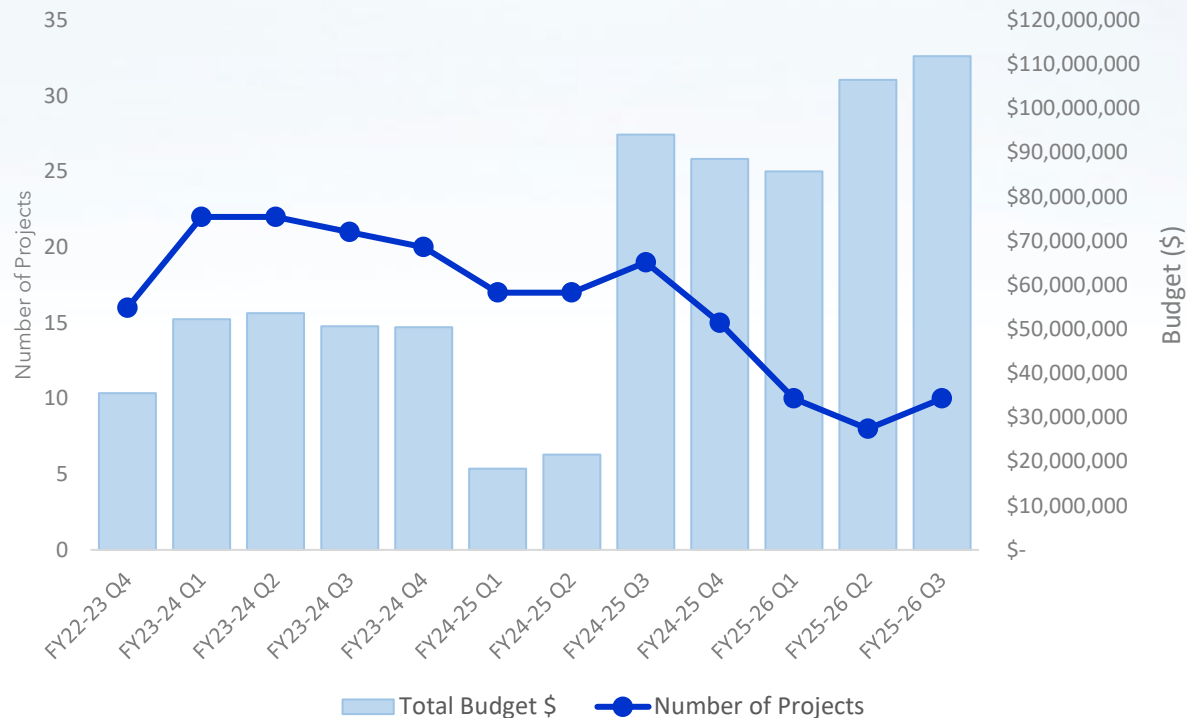
OCIT completed and deployed the Orangewood Children's Information System 2.0 (OCIS 2.0) for the Social Services Agency (SSA).

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.

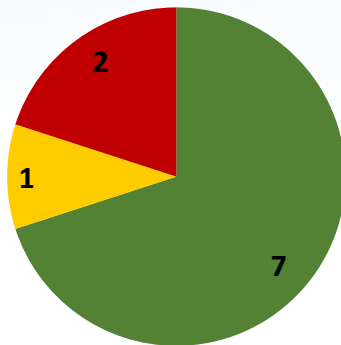


- The number of active projects is ten, two more projects than reported in the previous quarter.
- Project data from the last 12 quarters show an average of 16.45 and a median of 17 projects.
- The total portfolio budget increased by \$5,373,922.

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

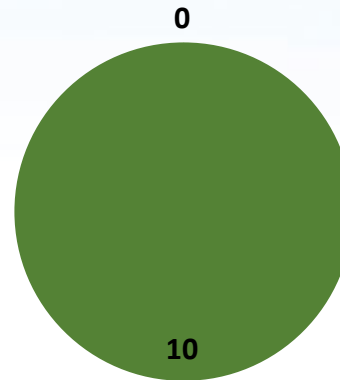
The charts below depict the County's IT project portfolio schedule and budget performance of the active and completed projects during the reporting period.

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, three projects experienced schedule delays of more than 10%, and no projects exceeded their 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.

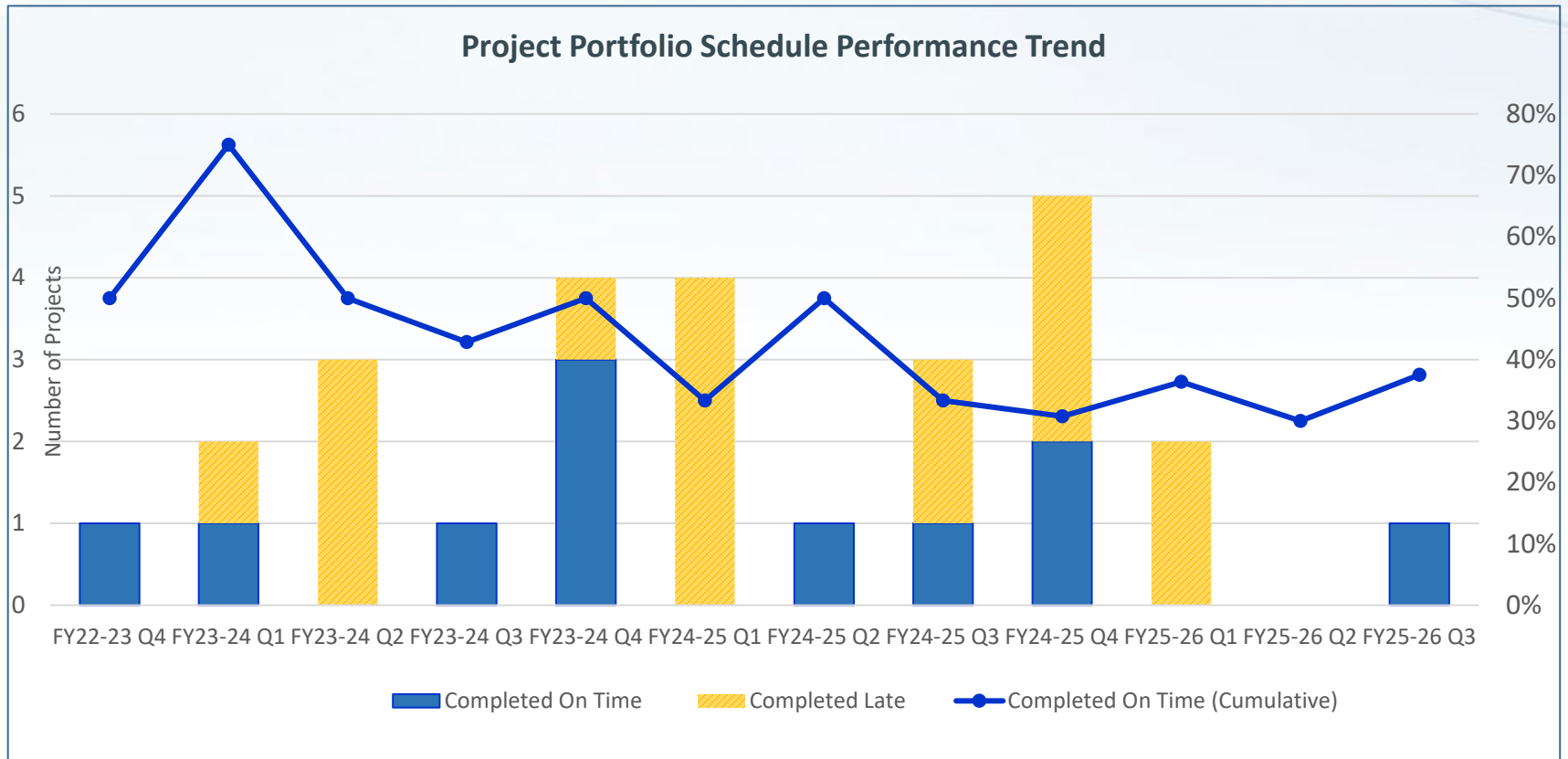
Portfolio Performance Trend

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.

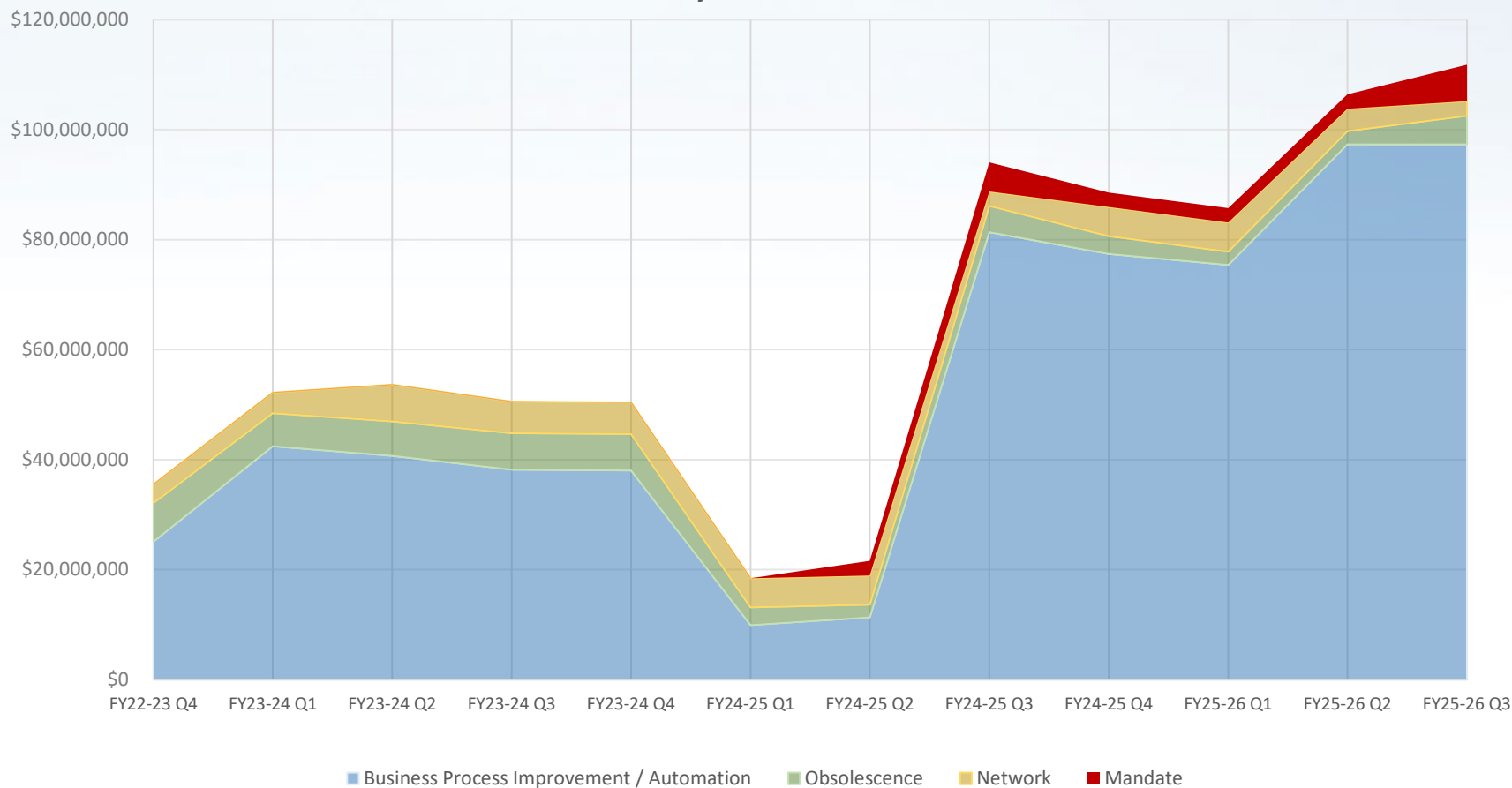
The line reflects the percentage of projects completed on schedule over four consecutive quarters.



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 87.06% of the County's IT budget this quarter. Projects for replacing end-of-life or obsolete systems account for 4.65% of the budget. Network projects account for 5.93% of the budget. Mandated systems account for 2.36% 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	ERP Transformation and Modernization - 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: \$ 93,685,000 Expended: \$ 10,625,380 Encumbered: \$ 13,326,356 Balance: \$ 69,823,264 Source: General Fund	Execution - Confirmed new go-live date of 6/8 to include delivery of four dashboards (one delivered 3/31) for Release 1B; continued delivery (build) phase and data conversion for Release 1C; continued delivery (build) phase, system integration, and data conversion for Release 1D; completed design phase for Release 1E; completed design phase and conducted workshops to identify and complete process maps and users stories for Release 2A; conducted information sharing sessions with stakeholder groups; established change agent network; began development of Release 1C training materials and user guides; completed Release 1 training plan and Release 2 Organizational Change Management (OCM) plan deliverables. In next period, continue delivery phase for Release 1B; continue delivery (build) phase and data conversion for Release 1C; continue delivery (build) phase, system integration, and data conversion for Release 1D; continue delivery (build) phase and system integrations for Release 1E; begin delivery (build) phase, system integration, and data conversion for Release 2A. For OCM, continue regular information sharing sessions. Execute Change Agent Network. Continue collecting and validating change impacts for Release 2A. Complete development of Release 1C training materials and user guides. Risk Mitigation - Due to data conversion complexity and Oracle cloud learning curve, there is a risk to project timeline. Revising assignments of report development and system integrations and leveraging additional resources. - Project is experiencing unfilled vacated positions and several unexpected extended leaves. Gaps may increase the risk of reduced project quality, timeline delays, and heightened burnout or turnover among remaining staff. Team has asked to consider filling two vacant positions while exploring options for additional resources.	26%

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
DA	DA	Case Management System (CMS) Replacement - To design and implement a secure, efficient, and user-friendly Case Management System (CMS) that empowers the District Attorney's Office and law enforcement agencies to streamline case workflows, enhance collaboration, and ensure the integrity and confidentiality of sensitive data. This project aims to improve operational efficiency, support timely decision-making, and strengthen public trust through modern technology solutions that uphold the highest standards of security and compliance.			Planned Start: 01/06/26 Planned End: 03/31/28 Budget: \$ 2,801,580 Expended: \$ 307,900 Encumbered: \$ 110,000 Balance: \$ 2,383,680 Source: General Fund	Execution - Launched and kicked off project with OCDA/Journal Team; developed vendor oversight project management tools and templates; developed RASCI to support the alignment of PM roles and responsibilities with JTI; coordinated team for Stages 1 and 2; planning for Stage 3. In next period, to continue team coordination, managing tasks between milestones, and ensuring successful completion of Stages 1 and 2 while initiating Stage 3. Risk Mitigation - RMS may need to be integrated into CMS in lieu of an interface; may require change to the scope and require additional time. OCDA is providing demos to JTI to ensure alignment on functionality. As project progresses, OCDA will need to decide whether RMS is in scope. JTI does not anticipate a financial impact; any change order would be limited to scope. - Data Conversion - EDC may not have existing data to convert; the functional requirements would flow into the portal and business process. JTI will collaborate with OCDA to design and implement portal and associated business processes required to support new CMS workflow. - Data Conversion - EDC may not have existing data to convert; the functional requirements would flow into the portal and business process. OCDA will need to determine whether DNA Database is to be included within scope of new functionality. JTI anticipates that, if included, this can be accommodated through configuration.	5%

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OCIT	COB	OC Agenda Rewrite - 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: \$ 1,671,879 Encumbered: \$ 0 Balance: \$ 729,056 Source: General Fund	Execution – Completed five-week end-to-end testing; ASR rollout to Production on 2/2/26; training sessions for COB and BOS D1, D2, D3, and D4; transitioned CEO to Central IT Service Desk support; initiated work on public portals and legacy data. In next period, to complete COB final testing and training and pre-rollout activities; continue work on public portals and legacy data. Risk Mitigation - Existing system is on outdated hardware and software; contingency plan is to require vendor to fix system and/or provide minimally viable replacement system.	72%
OCIT	Multi	County Enterprise Network Redundancy - 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 02/28/26 06/30/26 Budget: \$ 2,517,647 Expended: \$ 2,056,983 Encumbered: \$ 0 Balance: \$ 460,664 Source: General Fund, OCIT	Execution - Redundancy implementation and documentation efforts continued. In next period, complete documentation and redundancy implementation (internet redundancy from OCDC to CAS failover testing). Risk Mitigation Work order amendment 7 extending end date to 6/30/2026 approved by County. Required due to conflicts with Freeze Calendar and need to reschedule final testing.	93%

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OCIT	Multi	County Phone System Migration - This project transitions the County's on-premises phone system to a cloud-based platform, modernizing communications in alignment with the County's cloud-first strategy. The migration also delivers significant long-term cost savings by avoiding roughly \$2.8 million in handset replacements and over \$1.4 million in voice-core upgrades.			Planned Start: 02/11/26 Planned End: 02/05/27 Budget: \$ 2,572,342 Expended: \$ 101,808 Encumbered: \$ 0 Balance: \$ 2,470,534 Source: General Fund	Execution – Developed low-level design document; completed associated discovery and planning activities. In next period, will begin softphone rollout to OCIT and OC Data Center; validate core functionality, RedSky 911, and Microsoft Teams integration. <u>Risk Mitigation</u> N/A	14%
OCIT	Multi	Multi-Factor Authentication (MFA) System - 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: 06/30/25 03/31/26 05/31/26 Budget: \$ 930,000 Expended: \$ 752,488 Encumbered: \$ 0 Balance: \$ 177,512 Source: General Fund	Execution - Completed requisition of card readers at OC Community Resources (OCCR); completed rollout for all remaining CEO divisions. In next period, to complete software deployment for OCCR; continue rollout planning for OC Waste and Recycling; schedule MFA enablement for Board of Supervisors. <u>Risk Mitigation</u> Hardware procurement and project prioritization issues have pushed out the deployment schedule for OCCR and OCWR. OCCR to expedite rollout to complete within a four-week period.	86%

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OCIT	Multi	OC.GOV Migration - 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: \$ 451,898 Encumbered: \$ 0 Balance: \$ 1,258,277 Source: Participating Departments	Execution - Completed email migrations for CFCOC, Public Defender, and OC Public Works. In next period, to complete email migration for District Attorney; complete OCCR pilot user migration and Wave 1 of department email migration. <u>Risk Mitigation</u> N/A	47%
OCIT	PROB	Juvenile Hall Switch Migration - 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 12/28/26 Budget: \$ 1,536,570 Expended: \$ 1,576,281 Encumbered \$ 0 Balance: \$ (39,711) Source: Probation	Execution - Continued work on network assessment, discovery, and planning; 92% complete for these activities. 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. <u>Risk Mitigation</u> - A&E Design from OCIT subcontractor is late and has impacted the milestone dates. - AM2 has been executed, extending end date to 12/18/2026, per required OC Public Works (OCPW) infrastructure design and build in progress. - OCIT subcontractor and OCPW have estimated requirements may take until CY Q3 2026 to complete. - Future tasks shown are pending OCPW Infrastructure builds.	18%

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OCIT	SSA	Orangewood Children's Information System 2.0 (OCIS2.0) - 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: 09/30/25 01/21/26 Budget: \$ 880,864 Expended: \$ 767,917 Encumbered: \$ 0 Balance: \$ 115,247 Source: SSA	Execution - Completed end user training, go-live preparation, and go-live. In next period, to monitor application for 30-day post go-live and provide project closeout documentation. <u>Risk Mitigation</u> N/A	100%

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OCSD	OCSD	Automated Jail System - 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.			Planned Start: 10/31/17 12/14/21 Planned End: 12/16/22 12/31/24 06/30/25 10/31/25 12/01/25 06/01/26 Budget: \$ 2,792,000 Expended: \$ 633,750 Encumbered: \$ 0 Balance: \$ 2,158,750 Source: General Fund	Execution Completed system development and middleware integration; development of Jail Core and Inmate Core modules; conducted client review and acceptance testing sessions; completed Classification and Housing development; deployed Briefing Module and Validation activities. 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 dashboards for compliance, grievances, and inmate outcomes; extend ServiceNow app engine modules to cover Classification and Housing logic; prepare for parallel testing and user readiness training ahead of enterprise rollout. Risk Mitigation - Vacant positions. - Scope expansion due to stakeholder input or custom feature requests; define minimum viable project (MVP), manage change requests formally, and enforce sprint discipline. - Resistance to change, operational slows downs, or user errors; deliver targeted training, use simulation environments, and implement change management strategies. - Tight project deadline; tripled project resources to accelerate development and meet schedule. - Interface dependencies.	88%

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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.



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