County IT Projects

Quarterly Progress Report

4th Quarter, FY 25-26
Apr 1 – Jun 30, 2026

Orange County Information Technology

Summary

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 nine, one less than the number of projects reported in the previous quarter. One project was completed last quarter: Orangewood Children's Information System 2.0 (OCIS 2.0) for the Social Services Agency (SSA). No new projects were added this quarter. The total budget decreased from $111,826,363 to $110,946,199.

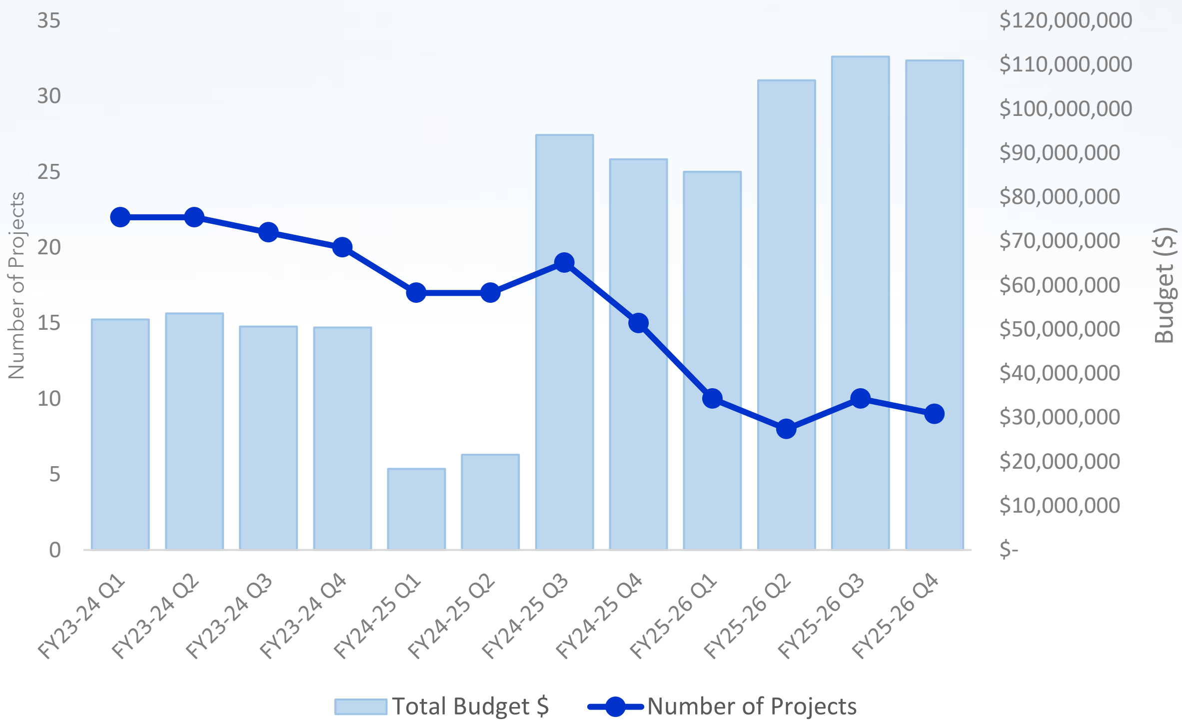
Key Accomplishments

OCIT, in partnership with its Managed Services provider (SAIC), completed and deployed the County Enterprise Network Redundancy project.

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.

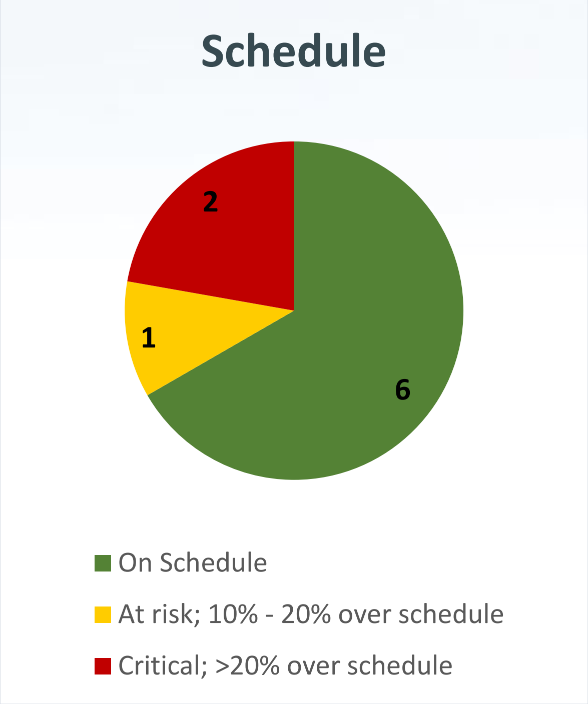


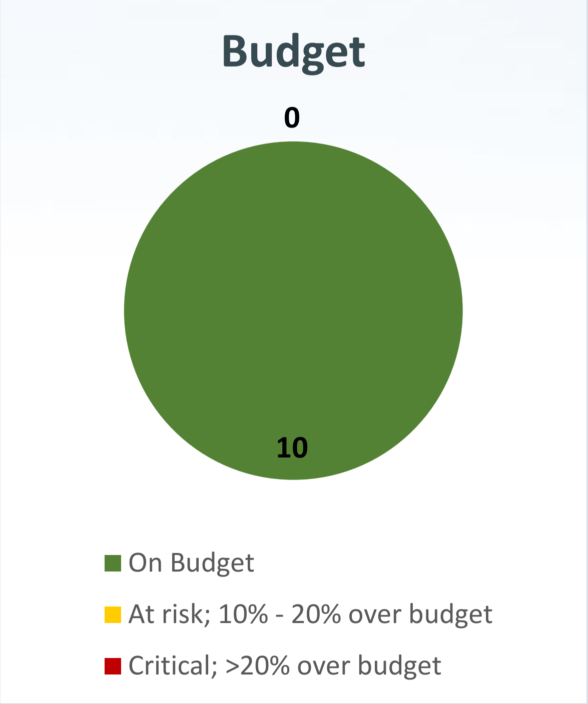
- The number of active projects is nine, one less project than reported in the previous quarter.
- Project data from the last 12 quarters show an average of 15.8 and a median of 17 projects.
- The total portfolio budget decreased by $880,164.

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

Portfolio Performance

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





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.

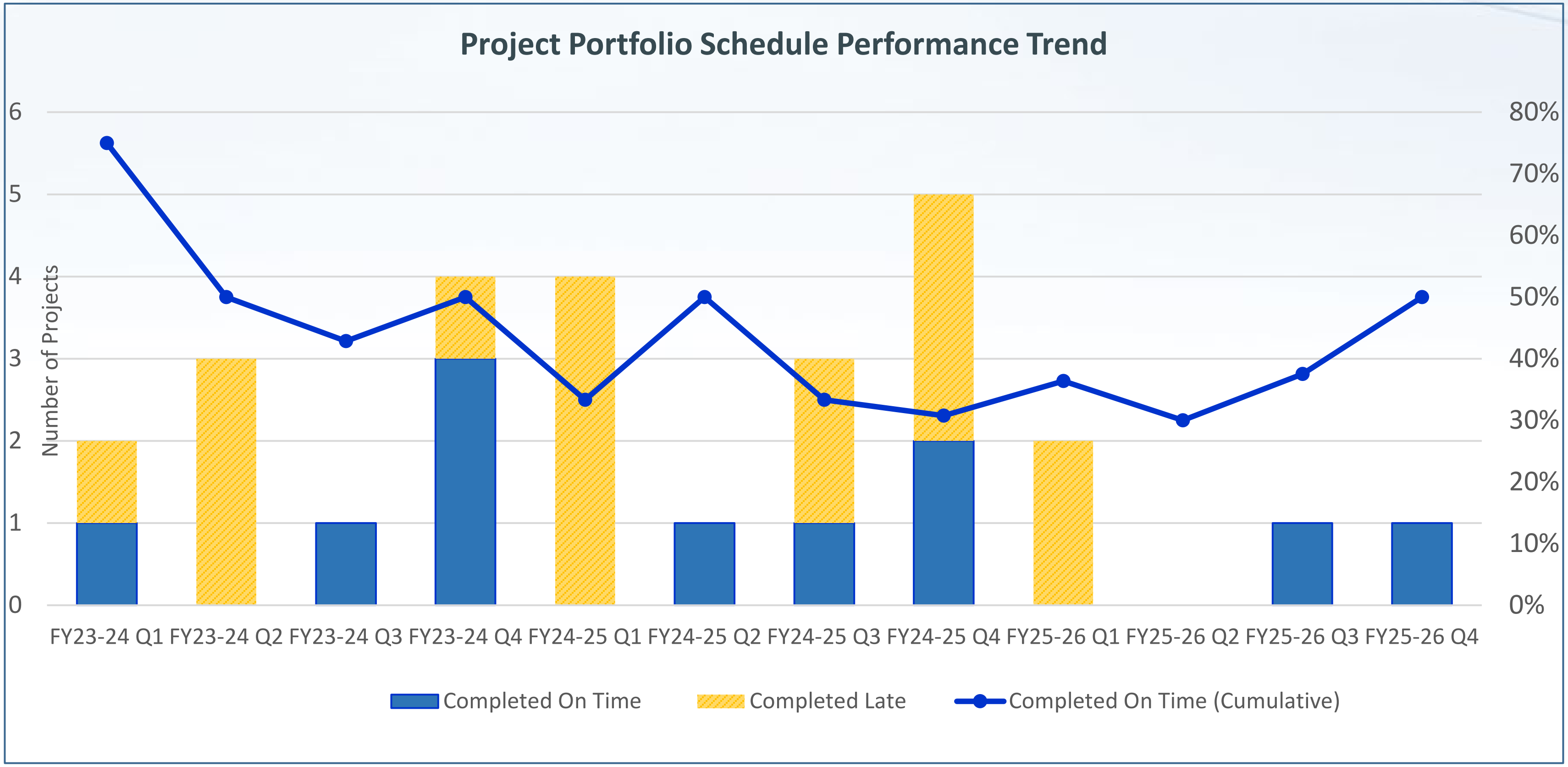
Scope changes and project dependencies are the primary contributors to project schedule delays.

Portfolio Performance Trend

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.

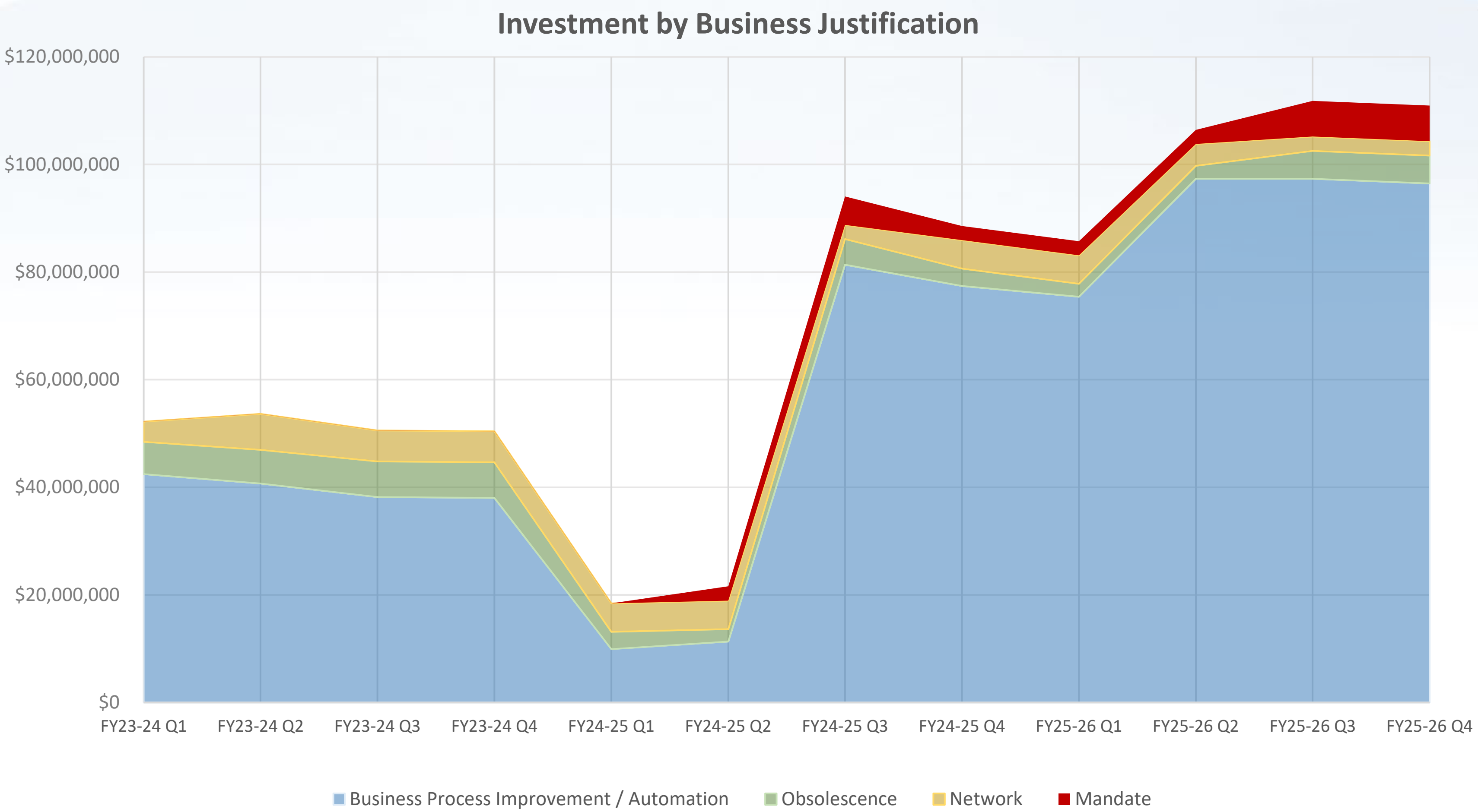
The line reflects the percentage of projects completed on schedule over four consecutive quarters.



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.

Project Investment Trends

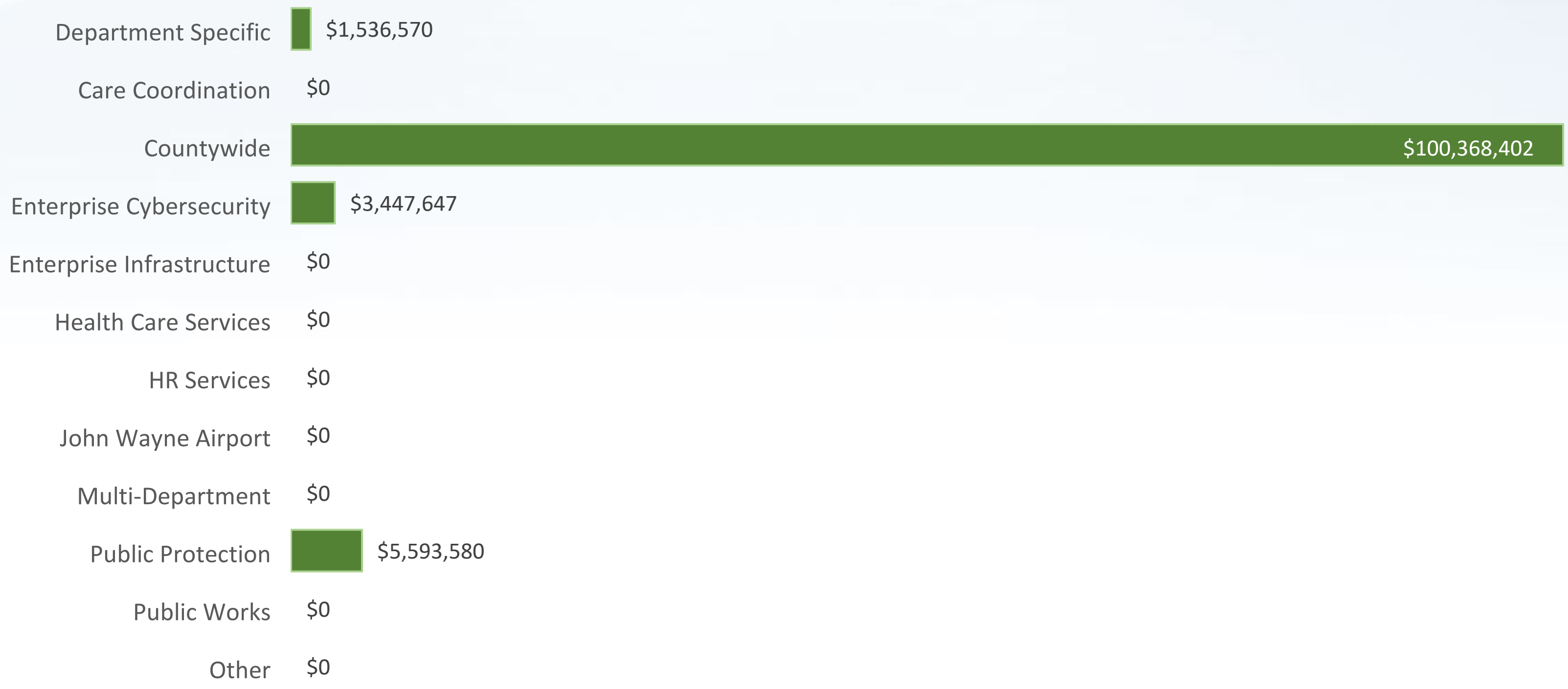
Projects intended to improve or automate business processes account for 86.96% of the County's IT budget this quarter. Projects for replacing end-of-life or obsolete systems account for 4.69% of the budget. Network projects account for 5.97% of the budget. Mandated systems account for 2.38% of the budget.



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

Investment by Service Area

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.

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: $ 19,277,194 Encumbered: $ 6,084,160 Balance: $ 68,323,646 Source: General Fund	**Execution** - Execution - Several releases of the new ERP system are progressing through various phases: Release 1B is live and in the support phase after being re-baselined; Release 1C is in testing and data conversion; Releases 1D and 2A are in the build phase with ongoing system integrations and data conversion; Release 1E has completed its design phase. Organizational Change Management efforts include stakeholder information sessions, establishing a Change Agent Network, developing training materials and user guides for Release 1C, and completing training and OCM plans for earlier releases. The new ERP system has been officially named Clarity OC. In next period, continue progressing on multiple releases: Release 1B continues in the support phase; Release 1C advances through testing and go-live while starting support; Release 1D focuses on testing, system integrations, and data conversion; Release 1E remains in the build phase with ongoing integrations; and Release 2A is also in the build phase with integrations and data conversion. Organizational Change Management efforts include regular information sessions, executing the Change Agent Network, validating change impacts for Release 2A, and completing training materials and user guides for Release 1C. **<u>Risk Mitigation</u>** - Release 1C implementation schedule has been adjusted from July to August 2026 to ensure all critical implementation readiness activities are completed before Go-Live. Project team is executing revised 1C implementation plan and completing remaining readiness activities. - Additional reports and system integrations as well as the County’s complex business requirements introduced schedule risks to Releases 1D and 2A. Team is mitigating schedule risks to Releases 1D and 2A by prioritizing the additional reports and integrations. - Project continues to experience unfilled vacated positions and several unanticipated extended absences. These gaps may increase risk of reduced project quality, timeline delays, and increased workload pressure or turnover among remaining staff. Team approved to fill one vacated position and to explore options for additional resources.	**39%**

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

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	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~~ 07/31/26 Budget: $ 2,400,935 Expended: $ 1,964,591 Encumbered: $ 0 Balance: $ 436,344 Source: General Fund	**Execution** – Conducted files management training; began publishing agendas for meetings starting on April 28, 2026; transitioned support to Help Desk / COB IT Support Team; continued work on search and archive; and progressed on remaining reports. In next period, complete search and public archive; complete remaining reports; complete prioritization of remaining post go-live requirements and enhancement requests; transition remaining BA tasks to COB IT Support; submit Project Change Request to include additional enhancements. **Risk Mitigation** N/A	**92%**

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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: $ 417,900 Encumbered: $ 0 Balance: $ 2,383,680 Source: General Fund	**Execution** - Coordinating teams to complete Stages 1 and 2; advancing planning for Stage 3; managing tasks between milestones; leading CMS Governance Committee process to narrow down and select document templates for submission to Journal Tech for office use. In next period, collect, consolidate, and build a cross-office workflow matrix based on processes gathered from all units. **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 in scope. - 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.	**7%**

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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	**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: $ 2,159,094 Encumbered: $ 0 Balance: $ 358,553 Source: General Fund, OCIT	**Execution** - All phases complete. Solution is in production. **Risk Mitigation** N/A	**100%**

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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	**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: $ 272,553 Encumbered: $ 0 Balance: $ 2,299,788 Source: General Fund	**Execution** – Completed development of low-level design document; completed associated discovery and planning activities; initiated pilot for OC Data Center. In next period, will conduct pilot rollout (OCIT) at Parker location to validate core functionality, RedSky 911, and Microsoft Teams integration; begin rollout to identified Phase 1 agencies. **Risk Mitigation** More time required to revise the low-level design documentation after the initial version was rejected for being too high-level. Work Order amended to incorporate additional time needed for Planning services. Overall project completion date remains unchanged.	**32%**
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~~ 09/30/26 Budget: $ 930,000 Expended: $ 871,963 Encumbered: $ 0 Balance: $ 58,037 Source: General Fund	**Execution** - Completed rollout at OC Community Resources (OCCR); department has elected to delay enforcement to a future date to avoid issues with ongoing projects. Completed pilot group testing at OC Waste and Recycling (OCWR). In next period, to complete rollout for OCWR. Timing has required extension of project completion date to September 2026. **Risk Mitigation** OCWR's timeline has shifted as they balanced MFA rollout with other high-priority initiatives. After identifying complex use cases, their executive team requested additional testing to ensure smooth deployment. OCIT has developed a revised implementation plan to ensure the rollout is completed by 9/30/26.	**95%**

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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	**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: 12/29/28 Budget: $ 1,710,125 Expended: $ 561,399 Encumbered: $ 0 Balance: $ 1,148,726 Source: Participating Departments	**Execution** - Completed email migrations for District Attorney (DA) and OC Community Resources (OCCR) pilot and Wave 1 users. In next period, to complete email migrations for Waves 2 - 5 at OCCR; conduct Probation pilot and Waves 1 - 3 email migrations. **Risk Mitigation** N/A	57%
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: $ 1,595,388 Encumbered $ 0 Balance: $ (58,818) Source: Probation	**Execution** - Completed reviews and assessments for existing switch network, UPS vs. new requirements, copper/fiber, power and cooling; developed rack diagrams per network room; supported OCIT infrastructure/cabling construction. In next period, to update documentation pending completion of network assessment, discovery, and planning; equipment delivery; and migration activities. **Risk Mitigation** - A&E Design from OCPW has been re-assigned to new A&E contractor and is in progress. - An AM3 will be required to extend end date further and remove Juvenile Hall Master Plan Phase 2 buildings from this project to achieve equipment and other cost savings. - OCPW has established that requirements may take until Q3 2027 to complete. - Project on hold pending further instructions from OCPW Operations.	18%

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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	**Automated Jail System** - Sheriff AJS 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~~ 12/01/26 Budget: $ 2,792,000 Expended: $ 633,750 Encumbered: $ 0 Balance: $ 2,158,750 Source: General Fund	**Execution** - Developed Jail Core and Inmate Core modules; conducted client review and acceptance testing sessions; completed deployment on 22 modules; worked with Custody Operations and JCATT to finalize structured implementation and validation plan, including completion of test cases and user personas. In next period, conduct one-on-one module review sessions with JCATT to validate workflows and confirm operational readiness prior to full UAT; prepare and configure the formal UAT environment, including test data setup, integration validation, and coordinating scheduling with County Operations; begin structured UAT with business owners, validating end-to-end custody workflows, module functionality, and integration behavior in preparation for three-month training period. **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. Extended project deadline by six months. - Interface dependencies.	**93%**

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Project Landing Map

Attachment A

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

Q1 FY25-26 Jul – Sep 2025	Q2 FY25-26 Oct – Dec 2025	Q3 FY25-26 Jan – Mar 2026	Q4 FY25-26 Apr – Jun 2026
✓ Access Control Conversion ✓ VPN Solution Expansion		✓ Orangewood Children's Information System 2.0	✓ County Enterprise Network Redundancy

Q1 FY26-27 Jul – Sep 2026	Q2 FY26-27 Oct – Dec 2026	Q3 FY26-27 Jan – Mar 2027	Q4 FY26-27 Apr – Jun 2027
■ Multi-Factor Authentication (MFA) System ■ OC Agenda Rewrite	■ Automated Jail System (AJS) ■ Juvenile Hall Switch Migration	■ County Phone System Migration	

Q1 FY27-28 Jul – Sep 2027	Q2 FY27-28 Oct – Dec 2027	Q3 FY27-28 Jan – Mar 2028	Q4 FY27-28 Apr – Jun 2028 →
		■ Case Management System (CMS) Replacement	■ ERP Transformation and Modernization (July 2028) ■ OC.GOV Migration (Dec 2028)

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