County IT Projects

Quarterly Progress Report

1st Quarter, FY 26-27
Jul 1 – Sep 30, 2026

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, the same number of projects reported in the previous quarter. One project was completed last quarter: County Enterprise Network Redundancy for OCIT. One new project was added this quarter: Environmental Health Data Management System for the Health Care Agency (HCA). The total budget increased from $110,946,199 to $114,727,677.



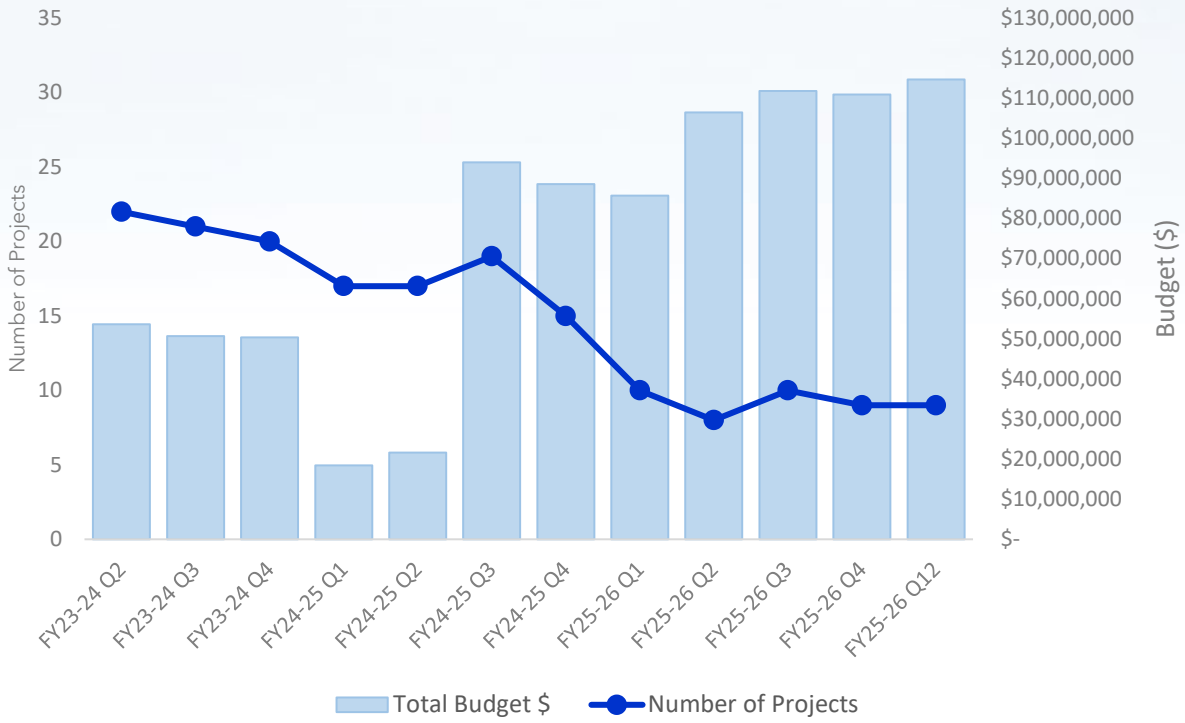
Key Accomplishments

OCIT completed configuration and deployment of Multi-Factor Authentication (MFA) for nine County departments.

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.



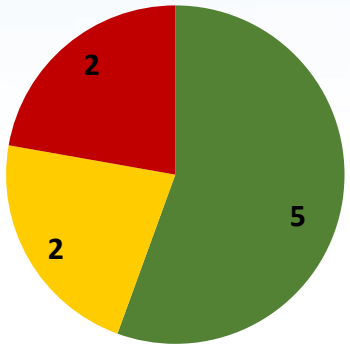
- The number of active projects is nine, the same number of projects reported in the previous quarter.
- Project data from the last 12 quarters show an average of 14.75 and a median of 16 projects.
- The total portfolio budget increased by $3,781,478.

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

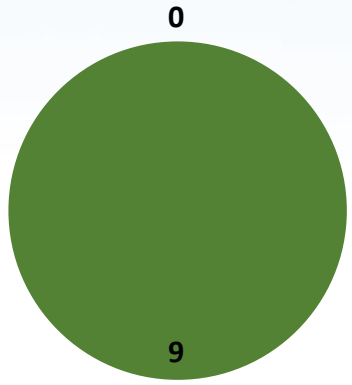
Portfolio Performance

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

Schedule



Budget



During this reporting period, four 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.

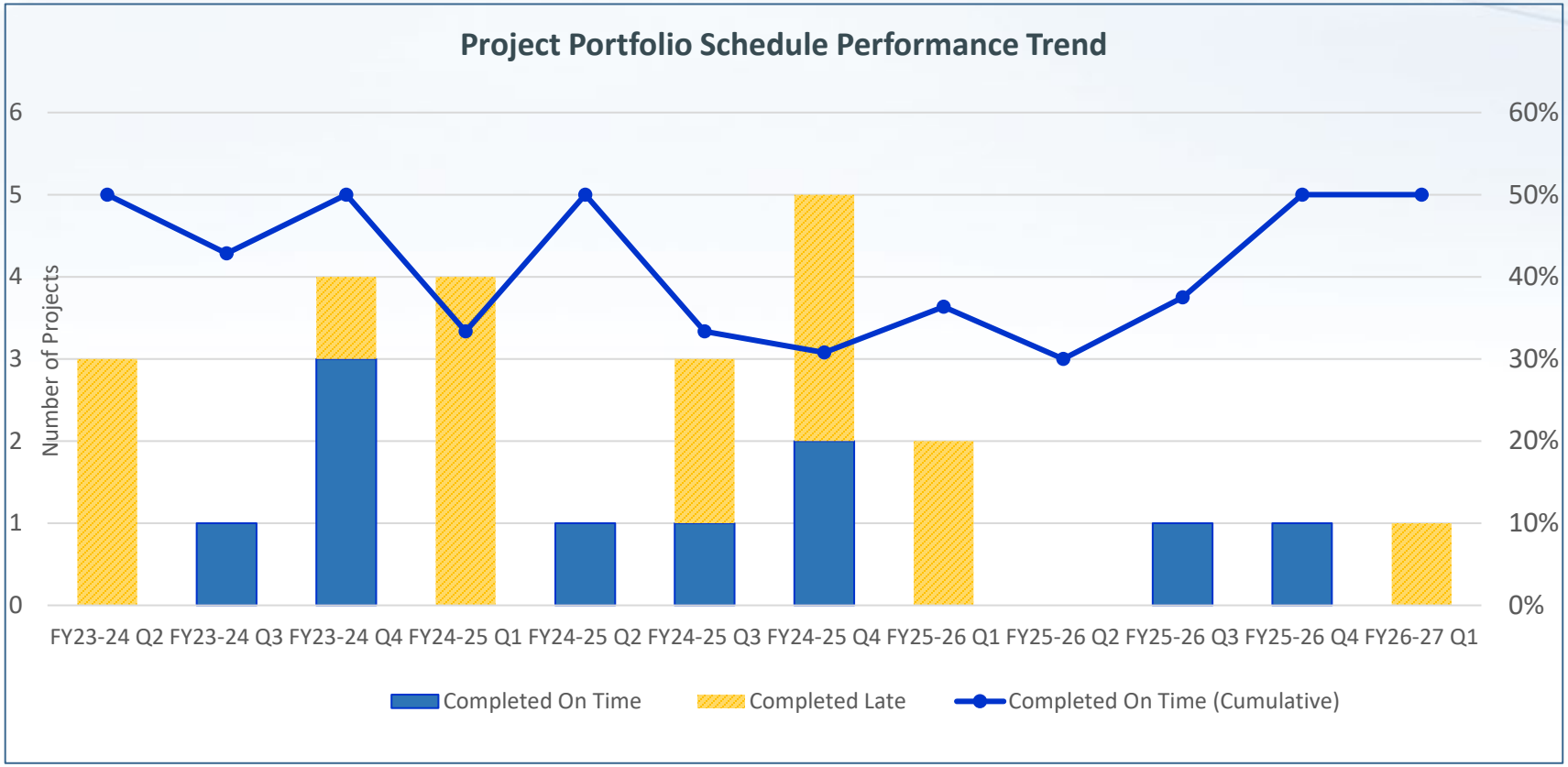
Portfolio Performance Trend

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.

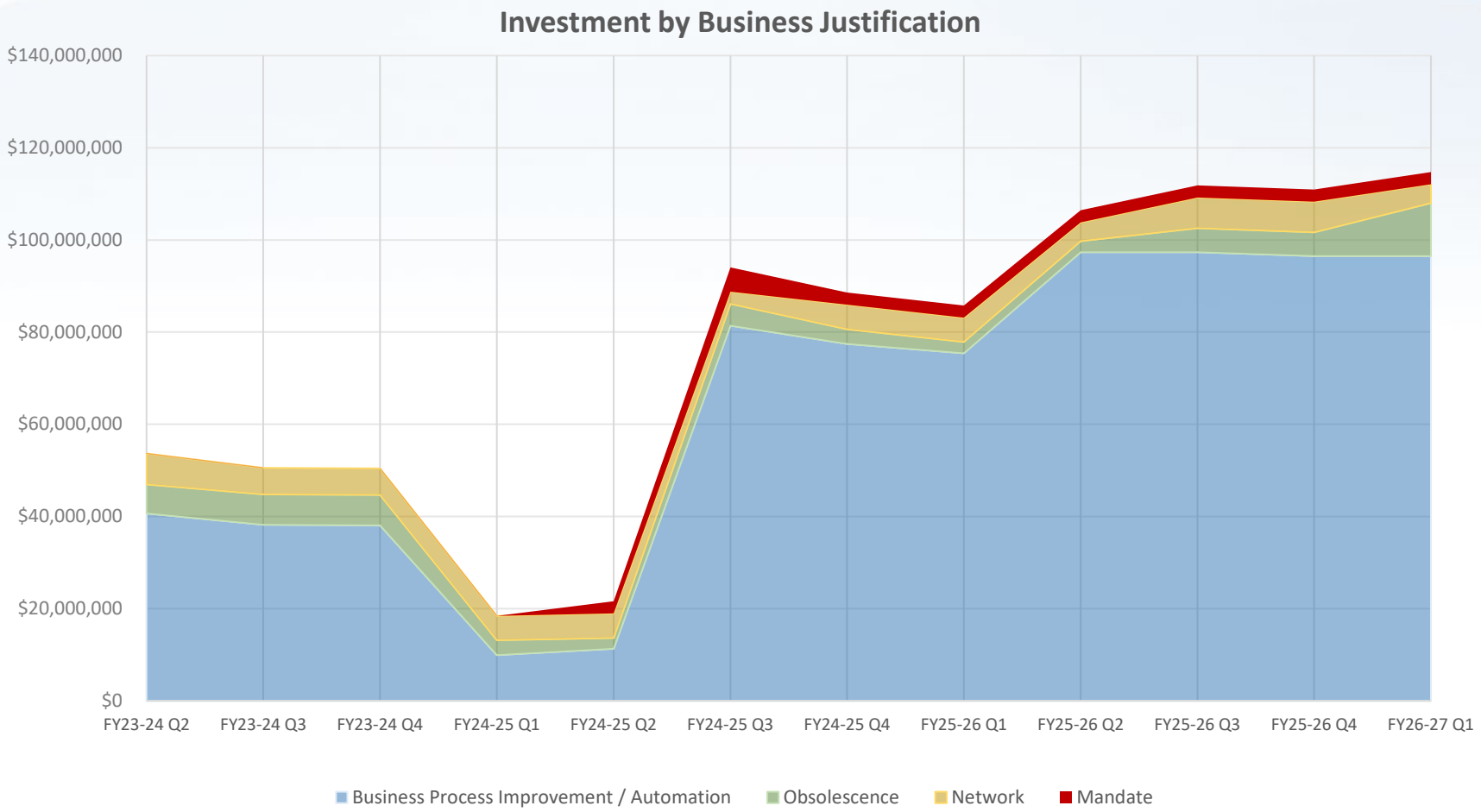


This portfolio budget performance trend may reflect the County's cost-schedule tradeoff decisions to stay within resource and budget constraints at the expense of schedule.

Project Investment Trends

Attachment A

Projects intended to improve or automate business processes account for 84.09% of the County's IT budget this quarter. Projects for replacing end-of-life or obsolete systems account for 10.03% of the budget. Network projects account for 3.58% of the budget. Mandated systems account for 2.30% 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.

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: $ 22,373,322 Encumbered: $ 2,988,032 Balance: $ 68,323,646 Source: General Fund	**Execution -** Project implementation activities continued to progress across multiple releases. Release 1B successfully completed Hypercare on 7/31/26, along with its associated deliverable. Release 1C went live on 9/10/26, and is currently in its initial support phase. For Releases 1D/E, team continued system configuration efforts, report development, integrations, and data conversion activities, while also initiating system integration testing. Release 2A remained in the build phase, with ongoing work focused on system integrations and data conversion. In parallel, Organizational Change Management activities included conducting information-sharing sessions with County stakeholder groups, advancing the development of Release 1C training materials and user guides, and beginning development of the Release 1D training curriculum. In next period, continue to advance across multiple releases. Release 1C remains in its support phase, with three planned run phases scheduled for completion in October 2026, July 2027, and November 2027. Development efforts for Releases 1D/E are focused on report creation, integrations, data conversion, and ongoing system integration testing, while Release 2A continues through the build phase with parallel work on integrations and data conversion. Organizational Change Management activities remain focused on engaging County stakeholder groups through regular information-sharing sessions, collecting and validating change impacts for Release 2A, and advancing development of the Release 1D training curriculum. **Risk Mitigation** - Release 1C go-live extended from July to September 2026 to allow for regression testing. Additional validation and testing of outstanding issues are in progress, which may impact readiness for countywide deployment. Budget team continues to work with vendor to address outstanding issues and ensure system functionality meets core Budget business needs. - Additional reports and system integrations as well as the County's complex business requirements introduced schedule risks to Releases 1C, 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 heighten the risk of reduced project quality, timeline delays, and increased workload pressure or turnover among remaining staff. Team approved to fill one vacated position and is requesting to unfreeze a recently vacated position. Team will continue to explore opportunities to reduce workload pressure among remaining staff.	**47%**

IT Project Dashboard

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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	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~~ 03/31/27 Budget: $ 2,400,935 Expended: $ 2,106,215 Encumbered: $ 0 Balance: $ 294,720 Source: General Fund	**Execution** – Continued work on search and archive functionality, legacy data migration, and remaining reports. Completed prioritization of post go-live parked items and determined revised project end date. Decommissioned legacy system and related web responses. In next period, complete work on search and archive functionality, legacy data migration, and remaining reports. Continue work on post go-live parked items. **Risk Mitigation** Project Change Requests (PCRs) for NTT (translation software) and PublicInput have impacted the project schedule and percent complete. Work on parked and bug items have been significantly delayed. New estimated project completion date is 3/31/27.	**87%**

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

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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: $ 395,750 Encumbered: $ 0 Balance: $ 2,405,830 Source: District Attorney	**Execution** - Collecting, consolidating, and building cross-office workflow matrix based on processes gathered from all units; mapping, standardizing, and merging data from all source systems into a centralized operational dataset. In next period, initiate design and integration of platform-wide reporting capabilities and security controls across all operational units. **Risk Mitigation** - Data Conversion - RMS data has not yet been provided by OCDA; may be incomplete and migration process could encounter unforeseen challenges. Work closely with OCDA to establish clear data delivery timelines, perform early quality assessments, and plan for contingencies in the migration process. - NOTE: Expenditures for the period ending 6/30/26 (FY 25-26 Q4) were previously reported at $417,900. This was an error. The amount reported for FY 26-27 Q1 is correct and includes costs of $110,000 for FY 25-26 Q4.	**42%**

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Critical: >20% over budget/schedule

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OCIT	HCA	**Environmental Health Data Management System** - Provide County of Orange Health Care Agency (HCA) Public Health Services (PHS) with a scalable, comprehensive, web-based data management system capable of supporting and managing the full range of Environmental Health workflows and operational needs. This includes modernizing the way Environmental Health programs handle permitting, inspections, plan reviews, invoicing, reporting, and public-facing services.			Planned Start: 06/16/26 Planned End: 06/28/29 Budget: $ 6,299,125 Expended: $ 65,929 Encumbered: $ 0 Balance: $ 6,233,196 Source: General Fund	**Execution** - Completed project kickoff and charter; Environmental Health job shadowing; conceptual solution architecture design and hosting strategy. In next period, to created the application development environment and design the customer registration portal. **Risk Mitigation** N/A	

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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~~ 03/31/27 Budget: $ 2,572,342 Expended: $ 925,465 Encumbered: $ 0 Balance: $ 1,646,877 Source: General Fund	**Execution** – Completed development pilot deployments for OC Information Technology (OCIT) and the OC Data Center. Continued rollout for Social Services Agency (SSA), with target completion scheduled for mid-October. In next period, initiate rollout for Health Care Agency (HCA). Begin Phase 2 rollouts (OC Community Resources (OCCR) and OC Public Works (OCPW). **Risk Mitigation** - Departments have requested an additional three weeks to complete site validation due to complexity of the process. - Human Resources Services (HRS) initiated a temporary pause to communicate E911 requirements to labor unions. - Third-party tools (InformaCast and Variphy) were not included in the original SOW. - To address these issues, vendor Work Order was amended to include changes to site migration list and inclusion of a phone line cutover success rate. Additional changes increased the cost by $62,800. Additional services added for third-party tools. End date extended to 3/31/27.	**36%**
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: $ 877,513 Encumbered: $ 0 Balance: $ 52,487 Source: General Fund	**Execution** – Completed rollout at OC Waste and Recycling (OCWR). Project is closing. **Risk Mitigation** Department executives have requested that enforcement of the 2-factor authentication policy be postponed to a later date to support a smoother transition.	**100%**

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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: 12/29/28 Budget: $ 1,710,125 Expended: $ 677,025 Encumbered: $ 0 Balance: $ 1,033,100 Source: Participating Departments	**Execution** - Completed email, web, and applications migrations for OC Community Resources (OCCR) and Probation. In next period, to complete email, external facing websites, and applications migrations for Child Support Services (CSS); kickoff migration project for OC Waste & Recycling (OCWR). **Risk Mitigation** N/A	**72%**
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~~ 03/31/27 Budget: $ 1,536,570 Expended: $ 1,605,945 Encumbered $ 0 Balance: $ (69,375) 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 restart project; continue with update of documentation pending completion of network assessment, discovery, and planning; equipment delivery; and migration activities. **Risk Mitigation** - Project has been split between OCIT and OCPW Redevelopment Plan Ph2. OCIT Work Order (WO) for three switch migrations only. - Amendment 3 to the OCIT Work Order will adjust switch migration counts and re-evaluate infrastructure requirements for completion of the three remaining switches. Migration date extended to Q1 2027. - Remaining 19 switch migrations are being transferred to the OCPW Redevelopment Plan Ph2 due to construction and timeline requirements. These switches will be on Work Order for this plan. - **NOTE:** This project is being rolled into the Juvenile Corrections Campus project and will be considered as part of the overall capital project. It will not be reported on the quarterly report after this quarter.	**18%**

On track; within 10% of budget/schedule

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

Critical: >20% over budget/schedule

IT Project Dashboard

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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** - Conducted one-on-one module review sessions with JCATT to validate workflows and confirm operational readiness prior to full UATClient User Acceptance Testing (UAT) sessions; prepared and configured UAT environment, including test data setup, integration validation, and coordinated scheduling with Custody Operations. Began structured UAT with business owners, validating end-to-end custody workflows, module functionality, and integration behavior. Worked with Custody Operations and JCATT to finalize structured implementation. In next period, to execute production Go-Live of new Jail Management System (JMS); transition Custody Operations from legacy environment to new platform; and validate critical workflows and integrations in production. Transition from implementation to operational support, prioritizing post-Go-Live enhancements, outstanding modules and integrations, and identify lessons learned during training and initial production use. **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.	**98%**

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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 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	■ Automated Jail System (AJS)	■ County Phone System Migration ■ juvenile Hall Switch Migration ■ OC Agenda Rewrite	
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	
Q1 FY28-29 **Jul – Sep 2028**	**Q2 FY28-29** **Oct – Dec 2028**	**Q3 FY28-29** **Jan – Mar 2029**	**Q4 FY28-29** **Apr – Jun 2029**
■ ERP Transformation and Modernization	■ OC.GOV Migration		■ Environmental Health Data Management System

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