County IT Projects
Quarterly Progress Report
3rd Quarter, FY16-17
January 1 – March 31, 2017

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 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 near-obsolete or end-of-life systems as well as investment in new 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 the status of these projects, this report describes the County's IT project performance trends over the last four quarters.

Highlighted Accomplishments

HRS Data Portal

HRS and OCIT collaborated to replace the Personnel Data Warehouse. The resulting HRS Data Portal won the 2017 National Association of Counties **(NACo) Achievement Award** in the category of Information Technology. The portal provides current as well as historical data. It is also integrated with a Business Intelligence tool to help users analyze the data and provides exception and compliance reports, enabling HRS to effectively and efficiently comply with the federal, state and local HR regulations and policies.
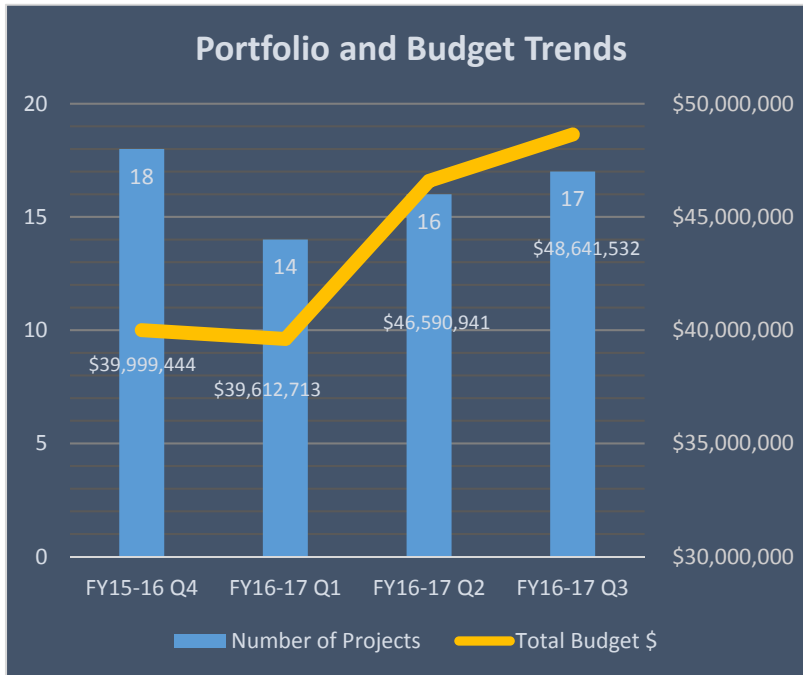
myOCgov Mobile Application

OCIT partnered with Supervisor Bartlett's Office to demonstrate leadership in civic technology. This mobile application helps constituents find County services near them with features such as Yelp-like geolocation.
The application won the NACo Achievement Award in the category of Civic Education and Public Information.
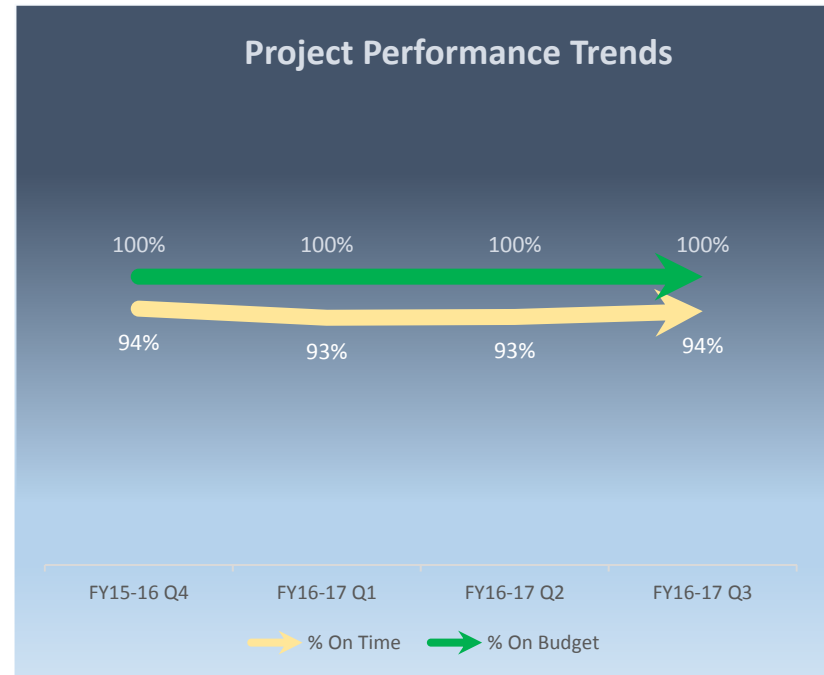
IT Project Portfolio Trends

This page and the following two pages depict the County's IT project portfolio trends over the last four quarters.

Portfolio and Budget Trends

- 18 — FY15-16 Q4 — $39,999,444
- 14 — FY16-17 Q1 — $39,612,713
- 16 — FY16-17 Q2 — $46,590,941
- 17 — FY16-17 Q3 — $48,641,532

Legend: Number of Projects | Total Budget $

Project Performance Trends

	FY15-16 Q4	FY16-17 Q1	FY16-17 Q2	FY16-17 Q3
% On Budget	100%	100%	100%	100%
% On Time	94%	93%	93%	94%

Legend: % On Time | % On Budget

Project data from the last four quarters reflect a stable portfolio of an average and median of 16 projects. This quarter's budget has increased by more than $2 million with the addition of:
- $864K for the PA/PG Conservatorship System
- $1 million for the multi-agency Computerized Maintenance Management System (CMMS)
- Two new projects: OC Safety Application and OCWR Capital Expenditures Planning System, at less than $200K each

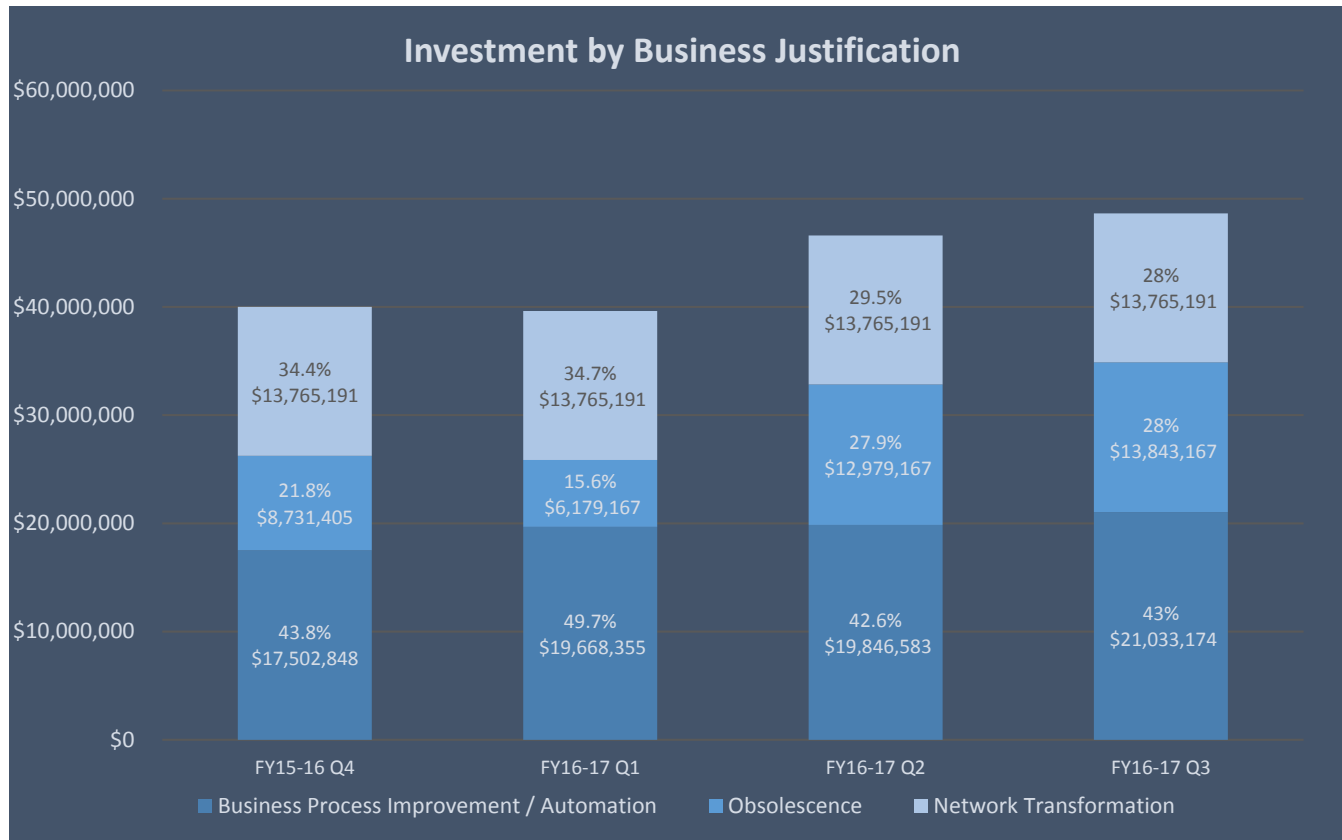The County's project portfolio has enjoyed a high level of performance, with the majority of projects on schedule and staying within budget. Budgets for two Health Care Agency projects were increased due to additional scope.

The HRS Data Analytics project was completed during this quarter. It was on schedule and below budget.

The charts above reflect projects that were active or completed during the reporting period.

Project Investment Trends

Together with the Voice and Data Network Transformation project, the County's IT projects to replace obsolescent systems and technologies account for more than 50% of the County's IT investments over the last four quarters.

Investment by Business Justification

Quarter	Business Process Improvement / Automation	Obsolescence	Network Transformation
FY15-16 Q4	43.8% $17,502,848	21.8% $8,731,405	34.4% $13,765,191
FY16-17 Q1	49.7% $19,668,355	15.6% $6,179,167	34.7% $13,765,191
FY16-17 Q2	42.6% $19,846,583	27.9% $12,979,167	29.5% $13,765,191
FY16-17 Q3	43% $21,033,174	28% $13,843,167	28% $13,765,191

The chart above reflect projects that were active or completed during the reporting period.

Project Investment Trends

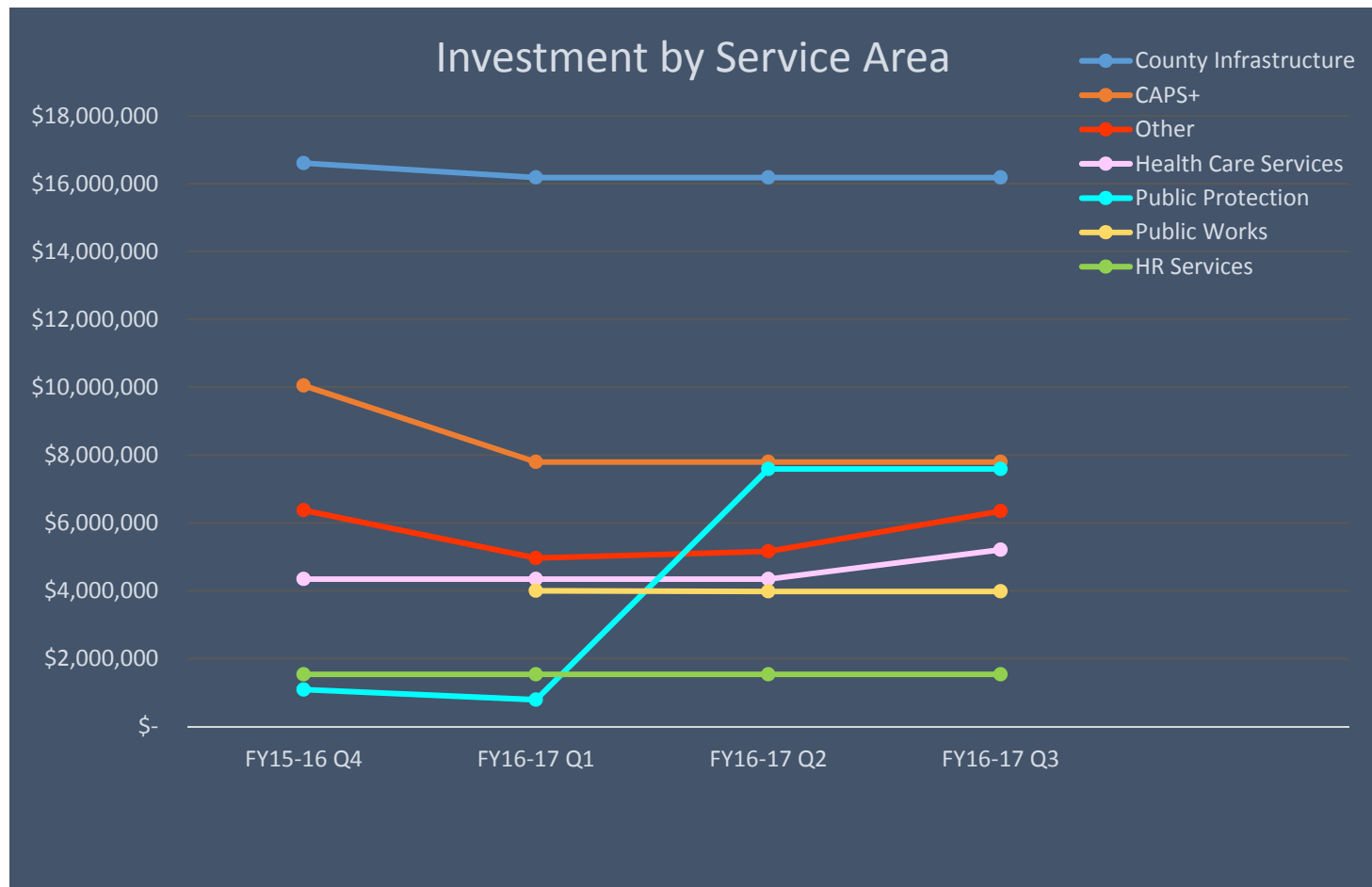Over the last four quarters, the CAPS+ upgrade and County infrastructure projects have accounted for almost half of the portfolio budget.

Investment by Service Area

Legend:
- County Infrastructure
- CAPS+
- Other
- Health Care Services
- Public Protection
- Public Works
- HR Services

The chart above reflect projects that were active or completed during the reporting period.

IT Project Dashboard

Managing Dept.	Business Owner	Project Name	Project Description	Budget	Schedule	Baselined Budget	Expended	Balance	Planned Start	Planned End	% Complete
A-C	A-C HRS	CAPS+ Advantage Upgrade	Upgrade the County's financial, purchasing, payroll and human resources systems			$ 7,795,081	$ 5,915,984	$ 1,879,097	10/07/15	08/31/17	78%
HCA	HCA	Behavioral Health Electronic Health Records Phase 2 of 3	Implement additional features, functions & capabilities for better management of summaries of care	*	*	$ 2,043,650	$ 1,553,866	$ 489,784	06/24/15	06/30/17	85%
HCA	HCA	PA/PG Conservatorship System	Replace near-obsolete system and provide additional functionality to fulfill civil and regulatory duties regarding decedent and conservatorship cases	*	*	$ 1,890,000	$ -	$ 1,890,000	06/01/17	06/30/18	0%
HCA	HCA	Public Health Electronic Health Record System	Implement Electronic Health Record (EHR) functionality for STD/HIV & Pulmonary diseases for Public Health Services	*	*	$ 1,275,737	$ 1,021,758	$ 253,979	06/24/15	06/30/17	90%
OCIT	COB	eAgenda Replacement	Replace end-of-life system and automate end-to-end ASR (Agenda Staff Report) process			$ 1,000,000	$ 101,407	$ 898,593	07/01/15	08/30/17	60%
OCIT	HRS	HRS Data Analytics	Improve the quantity and quality of evidence-based decisions about the county workforce			$ 993,698	$ 602,175	$ 391,523	04/04/16	01/31/17	100%
OCIT	HRS	Integrated Talent Management System	Implement an integrated system for performance management, learning management, and onboarding	**	**	$ 545,000	$ 50,783	$ 494,217	07/01/15	TBD	24%
OCIT	Multi	Computerized Maintenance Management System (CMMS)	Replace the existing legacy systems with a centralized repository for all County's real estate assets, starting with OCSD, OCPW and CEO/Real Estate	*	*	$ 3,519,780	$ -	$ 3,519,780	09/15/16	12/31/18	5%

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

* Project has been rebaselined.

** Procurement activities in process; project may need to be rebaselined.

- 🟩 On track; within 10% of budget/schedule
- 🟨 At risk; 10% - 20% over budget/schedule
- 🟥 Critical: >20% over budget/schedule

Managing Dept.	Business Owner	Project Name	Project Description	Budget	Schedule	Baselined Budget	Expended	Balance	Planned Start	Planned End	% Complete
OCIT	Multi	Project Information Management System (PIMS)	Provide a standard, countywide system to enhance the management of capital improvement projects	**	**	$ 495,000	$ 33,000	$ 462,000	03/01/16	12/30/17	25%
OCIT	OCIT	Enterprise IBM Mainframe Hardware & Software Upgrade	Upgrade the County's mainframe hardware and software to support Property Tax System and other systems			$ 2,413,167	$ 1,460,550	$ 952,617	07/01/14	06/30/18	54%
OCIT	OCWR CEO Risk Mgmt.	OC Safety Application	Develop a Countywide Safety application to help reduce liabilities related to workplace injuries, illnesses and property damage, and to comply with the CCR, Title 8.			$ 197,000	$ 70,170	$ 126,830	09/01/16	06/30/17	60%
OCIT	OCIT	Voice & Data Network Transformation	Implement a Countywide, converged Voice and Data Network in order to eliminate duplicate circuits and maintenance costs and increase network capacity		*	$ 13,765,191	$10,323,894	$ 3,441,297	09/01/13	10/31/17	70%
OCIT	OCPW	CRM Platform for Land Management System	Implement a unified portal on the Salesforce.com CRM platform and integrate with the Land Management System			$ 3,981,228	$ 2,903,884	$ 1,077,344	08/01/16	09/30/17	30%
OCIT	OCSD	Integrated Jail Management System	Replace the existing 25-year-old system, another step in the Sheriff's modernization strategy to replace systems currently on the Unisys mainframe	**	**	$ 6,800,000		$ 6,800,000	06/15/16	12/31/17	40%
OCIT	OCWR	Master Capital Expenditure & Planning (MCEP) System	Automate and standardize MCEP process for managing landfill capital projects in order to assess and respond to impacts from changes in tonnage and site conditions.			$ 187,000	$ 6,697	$ 180,303	02/01/17	03/31/18	10%
OCSD-Comm.	COB	Boardroom AV System Upgrade	Upgrade the existing Crestron audio/video equipment in the Board Hearing Room		*	$ 950,000	$ 17,500	$ 932,500	07/01/15	12/15/17	6%
PD	PD	PD Case Management System	Develop a new system with the ability to integrate with other Justice Partners (e.g., DA, Courts, etc.)			$ 790,000	$ 627,500	$ 162,500	04/01/16	05/31/17	75%
			Grand Total			**$ 48,641,532**	$24,689,168	$23,952,364			

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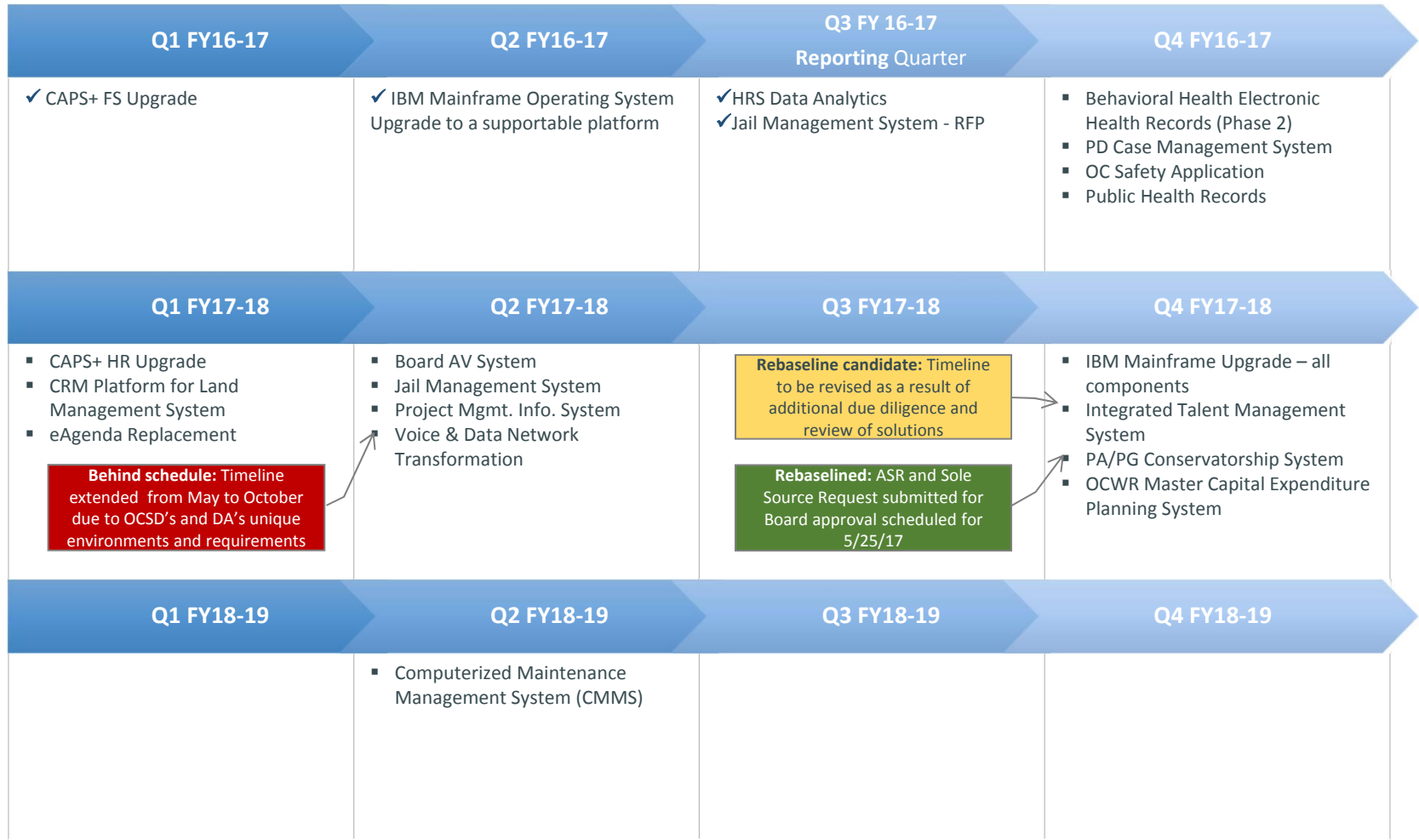*** Procurement activities in process; project may need to be rebaselined.*

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Project Landing Map

The map below depicts when project benefits are realized.

Q1 FY16-17	Q2 FY16-17	Q3 FY 16-17 Reporting Quarter	Q4 FY16-17
✓ CAPS+ FS Upgrade	✓ IBM Mainframe Operating System Upgrade to a supportable platform	✓ HRS Data Analytics ✓ Jail Management System - RFP	■ Behavioral Health Electronic Health Records (Phase 2) ■ PD Case Management System ■ OC Safety Application ■ Public Health Records

Q1 FY17-18	Q2 FY17-18	Q3 FY17-18	Q4 FY17-18
■ CAPS+ HR Upgrade ■ CRM Platform for Land Management System ■ eAgenda Replacement **Behind schedule:** Timeline extended from May to October due to OCSD's and DA's unique environments and requirements	■ Board AV System ■ Jail Management System ■ Project Mgmt. Info. System ■ Voice & Data Network Transformation	**Rebaseline candidate:** Timeline to be revised as a result of additional due diligence and review of solutions **Rebaselined:** ASR and Sole Source Request submitted for Board approval scheduled for 5/25/17	■ IBM Mainframe Upgrade – all components ■ Integrated Talent Management System ■ PA/PG Conservatorship System ■ OCWR Master Capital Expenditure Planning System

Q1 FY18-19	Q2 FY18-19	Q3 FY18-19	Q4 FY18-19
	■ Computerized Maintenance Management System (CMMS)		

✓ *Project benefits that have ben realized.*