



City of East Palo Alto
2415 University Avenue
East Palo Alto CA 94303

Five Year Information Technology Strategic Plan



GOVERNMENT
TECHNOLOGY GROUP, LLC

Strategic Planning, IT Assessment, PM, Broadband Planning, IV&V

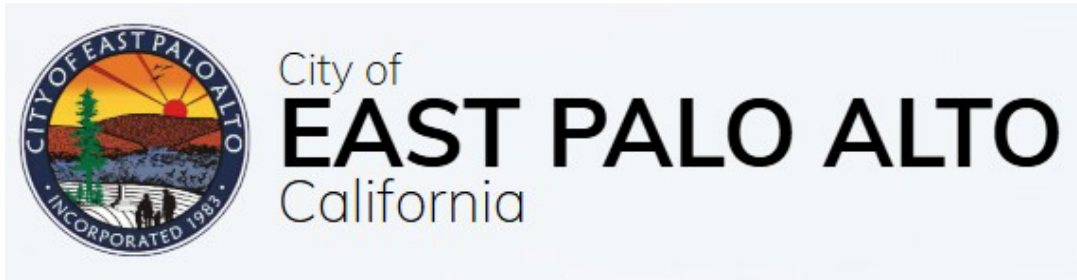
2026

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Table of Contents

About East Palo Alto	3
The City of East Palo Alto's Overall Strategic Vision	4
Executive Overview	7
Description of Process	9
Strategic Planning	11
Project Purpose.....	17
Process.....	20
Current State Overview	23
Information Technology Capability Gaps	35
Recommendations.....	64
Network and Security Plan Recommendations.....	77
Recommendation Summary - Gap Analysis	78
Information Technology Funding Benchmarks.....	81
Appendix A – Governance Structure	85
Appendix B - Future Projects Matrix	91



About East Palo Alto

East Palo Alto is a dynamic, steadily evolving municipality in San Mateo County, California, situated along the western shoreline of the San Francisco Bay. As of the 2020 U.S. Census, the city is home to 30,034 residents. Its location places it at a strategic midpoint between San Francisco and San Jose, anchoring the community squarely within the heart of Silicon Valley—one of the world’s most influential centers of technology, research, and innovation.

The City’s physical setting is defined by both natural and urban boundaries. To the north and east, the San Francisco Bay provides expansive waterfront views and ecologically significant wetlands. Menlo Park borders the City to the west, while Palo Alto—home to Stanford University and numerous global technology firms—lies directly to the south across San Francisquito Creek. The Bayshore Freeway (U.S. Route 101) serves as a major transportation corridor and a symbolic dividing line, with East Palo Alto’s primary residential and commercial districts located northeast of the freeway and Palo Alto’s neighborhoods to the southwest.

Today, East Palo Alto reflects a narrative of resilience, cultural richness, and forward-looking progress. Its growing economic base, diverse community, and commitment to equitable development continue to define its identity as an integral and increasingly influential part of the broader Bay Area innovation ecosystem.



The City of East Palo Alto's Overall Strategic Vision

Council Priorities: Guiding Vision for Strategic Action and Community Investment

The Council Priorities represent the City of East Palo Alto's highest-level strategic focus areas, serving as a compass for how municipal resources, policies, and initiatives are directed. These priorities are not abstract ideals—they are the product of a comprehensive and inclusive engagement process conducted in Spring 2025, during which residents, community leaders, and key stakeholders came together to articulate the City's most pressing challenges and promising opportunities.

Through this collaborative effort, the City Council distilled a shared vision into a set of actionable priorities that reflect the values, aspirations, and lived experiences of East Palo Alto's diverse community. By formally adopting these priorities, the Council provided clear policy guidance to the City Manager and empowered staff to align their work with initiatives that promote equity, resilience, and measurable improvements in quality of life.

These priorities now serve as a strategic framework for decision-making, budget allocation, and program development—ensuring that every effort undertaken by the City is purpose-driven, community-informed, and results-oriented.

City Council's Strategic Priorities for Fiscal Years 2025 through 2029

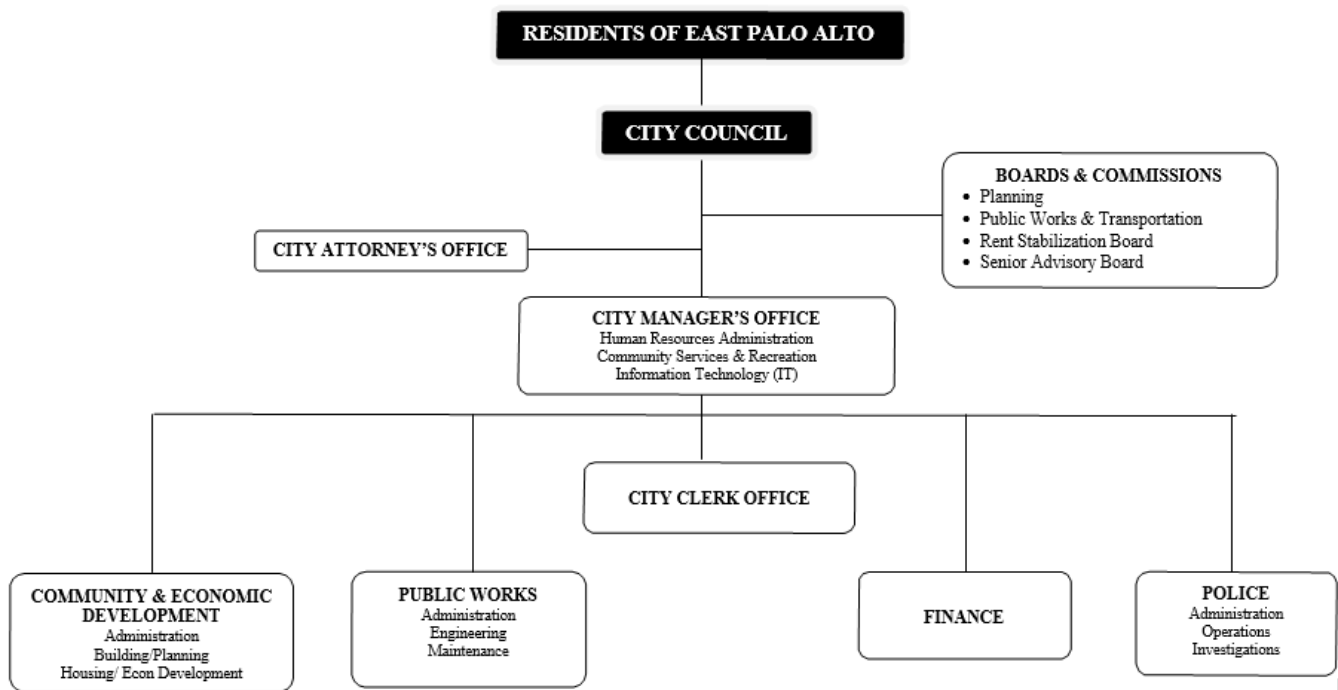
- **Civic Engagement:** Provide diverse and inclusive opportunities for all EPA community members to participate in City meetings, have a voice in City affairs, and develop leadership skills for EPA youth.
- **Comprehensive Housing:** Increase the City's housing stock at all income levels (from affordable to market rate), facilitate pathways to homeownership, and prevent displacement of existing residents.
- **Governance, Organizational Strength, and Fiscal Sustainability:** Strengthen the City's internal capacity, transparency, and long-term financial health by improving core operations, investing in workforce and systems, and implementing data-informed strategies to ensure effective service delivery, accountability, and fiscal resilience.
- **Land Use, Economic, and Workforce Development:** Support balanced development that attracts investment, strengthens local businesses, reduces economic leakage, and expands access to quality jobs and services that meet local needs.
- **Parks, Recreation, and Community Facilities:** Invest in the modernization and expansion of the City's parks, recreation, and community facilities and services to increase residents' access to open spaces and recreational opportunities.
- **Public Health, Safety, and Quality of Life:** Implement and enforce strategies to ensure public safety, improve the livability of neighborhoods, and prepare the City for disasters and emergencies.
- **Public Infrastructure and Utilities:** Maintain, modernize, and expand the City's physical infrastructure (streets, sidewalks, utilities) to support existing homes and businesses, and new development.



Mission Statement

The City of East Palo Alto provides responsive, respectful, and efficient public services to enhance the quality of life and safety for its multi-cultural community.

CITY OF EAST PALO ALTO CITY ORGANIZATIONAL CHART FY 2025-2026 Budget





Executive Overview



Executive Overview

Objective

The City of East Palo Alto (City) has initiated the development of a comprehensive five-year Information Technology (IT) Strategic Plan to guide the evolution of its digital infrastructure and services. To inform of this effort, the Government Technology Group, LLC (GTG) conducted a thorough assessment of the City's information technology environment during November 2025 through March 2026. This evaluation encompassed a holistic review of the City's current IT services, organizational structure, and the alignment of technology resources with core municipal functions. It also examined staffing capacity, system support requirements, and the governance and management frameworks that underpin IT service delivery.

The resulting strategic plan will serve as a roadmap for modernizing and enhancing the City's technological capabilities over the next five years. It will identify key priorities, recommend actionable initiatives, and establish a framework for continuous improvement—ensuring that IT investments are aligned with the City's operational needs and long-term vision. In alignment with the City's overarching Mission and Vision, the following statements articulate the guiding Mission, Vision, and Values for the City's Information Technology function.

Mission

- Deliver expert, responsive, and courteous technical support for all City employees, ensuring seamless operation of hardware and software systems across departments.
- Maintain high availability and reliability of mission-critical IT infrastructure, proactively monitoring and resolving issues to safeguard uninterrupted municipal operations.
- Design and conduct effective training programs on standard City software applications, empowering staff to maximize productivity and adopt best practices in digital workflows.
- Develop and implement forward-thinking, cost-efficient technology strategies that enhance operational efficiency and align with the City's long-term service delivery goals.
- Support cross-departmental data initiatives by assisting with the extraction, compilation, and analysis of information housed in City systems, enabling informed decision-making and improved public service outcomes.

The City's IT Vision

- ❖ Develop and implement a comprehensive Information Technology Strategic Plan that aligns with the City's mission, values, and long-term vision — fostering innovation, operational excellence, and fiscal responsibility. The plan will guide the delivery of secure, scalable, and advanced technology solutions that empower City staff, enhance service delivery to residents, and support the evolving needs of elected officials. Through strategic investment, stakeholder collaboration, and continuous improvement, the City will ensure its IT programs are resilient, cost-effective, and professionally managed.



Values

- ✓ Deliver exceptional, community-focused service in a fiscally responsible way, which is responsive, reliable, and timely—ensuring public trust through consistent performance and accountability.
- ✓ Champion the City's strategic direction by aligning technology initiatives with its mission, vision, and organizational goals, translating business needs into actionable, measurable outcomes.
- ✓ Safeguard the integrity and confidentiality of information assets, proactively protecting City and customer data from unauthorized access, misuse, or compromise.
- ✓ Ensure the resilience and reliability of technology infrastructure, enabling uninterrupted service delivery and supporting the operational continuity of City functions.
- ✓ Foster a culture of innovation and continuous improvement by leveraging emerging technologies, streamlining processes, and cultivating collaborative partnerships across departments and regional agencies to enhance public service delivery.



Description of Process

Strategic IT Assessment and Implementation Roadmap

An in-depth assessment was conducted to evaluate the City of East Palo Alto's current IT service delivery model against recognized industry standards and best practices. This comprehensive review validated the IT Division's existing framework and identified opportunities to enhance efficiency and cost-effectiveness. The ultimate goal is to support the City's commitment to streamlining and modernizing its IT operations through a robust strategic planning process.

The strategic planning effort, informed by industry benchmarks, surfaced five critical dimensions essential for the successful implementation and sustainability of IT programs:

- 1) **IT Decision-Making**

Establish clear roles, responsibilities, and governance processes to guide sound IT investment decisions and ensure alignment with organizational priorities.

- 2) **Applications**

Prioritize the adoption of "commercial off-the-shelf" (COTS) enterprise class software solutions. Regular training and business process reviews will ensure staff can leverage new features and functionalities to enhance support for core municipal operations.

- 3) **Technical Infrastructure**

Maintain an internal service fund dedicated to the lifecycle management of network related hardware, software, databases, and network infrastructure. This fund will ensure the City's technology backbone remains resilient, scalable, and secure.

- 4) **Service Delivery**

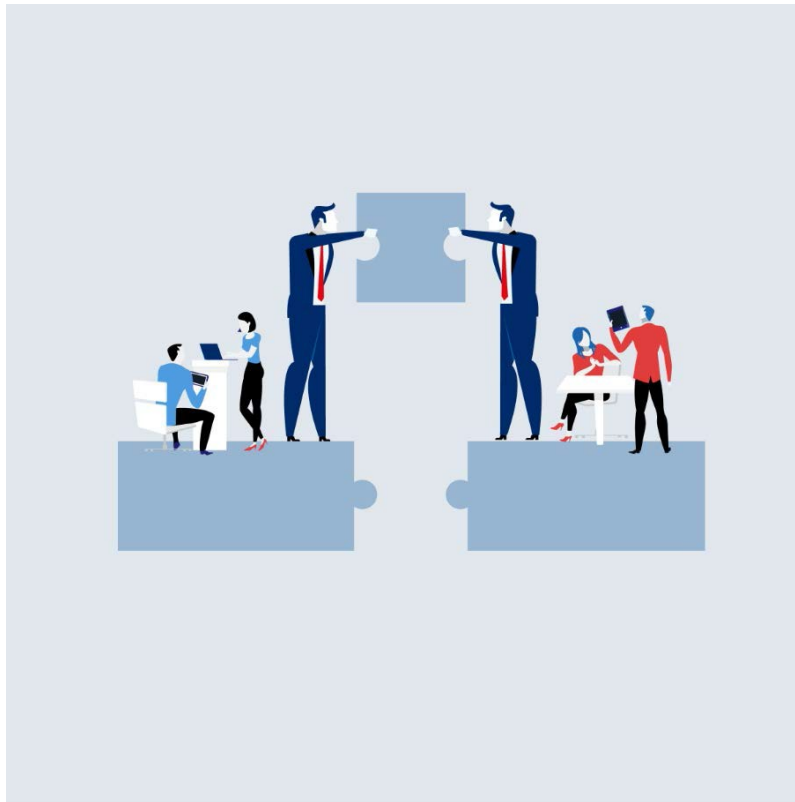
Design an organizational IT structure and staffing model that meets the evolving needs of internal stakeholders and the broader community. The model must support daily operations and provide expertise for critical technology services.

- 5) **Community Access and Engagement**

Implement systems that enhance transparency, accountability, and resident engagement. These platforms should support business functions while fostering inclusive access to City services.

This strategic plan serves as a guiding framework to help the City allocate time and resources effectively, prioritize operational needs, and remain agile in adopting emerging technologies. Its success hinges on broad understanding, consistent application, and active use across departments.

The Information Technology Strategic Planning process is built on the principle of continuous improvement. As a living document, it informs operational decisions and long-term planning. Achieving its full potential requires sustained commitment from City leadership, staff, and stakeholders, along with adherence to the overarching strategic vision.



Strategic Planning



Strategic Planning

Overview of an Information Technology Strategic Plan (ITSP)

An ITSP is a foundational document that articulates the comprehensive, technology-enabled business management processes an organization employs to guide its operations, service delivery, and long-term growth. It serves as a critical decision-making framework, ensuring that IT initiatives are aligned with organizational priorities and implemented in a structured, value-driven manner.

More than a tactical checklist, the ITSP functions as a dynamic roadmap for translating the broader IT strategy into actionable steps. While the IT strategy defines how technology will support the organization's success, the strategic plan operationalizes that vision—identifying specific areas where IT can deliver measurable business value, enhance service outcomes, and optimize resource utilization.

Strategic Alignment and Flexibility

The objectives embedded within an ITSP are intentionally aligned with the organization's overarching mission, vision, and strategic goals. However, the plan must remain adaptive—capable of accommodating emerging technologies, evolving business priorities, and shifts in stakeholder expectations. This flexibility ensures that IT investments remain relevant and responsive to both internal needs and external pressures.

According to Gartner, a leading IT research and advisory firm, a well-constructed IT strategic plan clearly delineates:

- 1) What must be done to achieve strategic outcomes
- 2) In what priority should those actions be executed
- 3) How success will be measured, using defined key performance indicators (KPI's) and benchmarks

Strong KPIs for local government IT and business systems should balance service reliability, user experience, cybersecurity, financial stewardship, and strategic value. The best programs don't track dozens of metrics—they focus on a concise set that leadership can actually use to make decisions. For a City the size of East Palo Alto, the agency should focus on 10-15 KPI's total.

The following is a practical, government-focused KPI set organized by category:

1. Service delivery and support
2. Cybersecurity and risk
3. Asset and lifecycle management
4. Project and strategic delivery
5. Financial management
6. Business systems effectiveness
7. Customer / public experience

Foundational Elements of the Plan

To be effective, the ITSP should begin with a review of the organization's broader strategic plan. This step ensures that IT initiatives are not developed in isolation but are instead designed to support and amplify the



organization's core objectives, whether improving operational efficiency, enhancing public service delivery, or fostering innovation.

Key components of a robust IT strategy plan include:

- 1) **Mission Statement:** A concise declaration of what the IT function aims to achieve and how it supports the organization's strategic direction.
- 2) **Strategic Objectives:** Clear goals that reflect both current priorities and future aspirations, with built-in flexibility to adapt to change.
- 3) **SWOT Analysis:** A structured assessment of internal strengths and weaknesses, as well as external opportunities and threats. This analysis helps identify gaps between current capabilities and desired outcomes, informing resource allocation and risk mitigation strategies.
- 4) **Technology Asset Inventory:** A review of existing IT assets to uncover underutilized tools or platforms that may offer strategic advantages if leveraged more effectively.

Investment Prioritization and Resource Planning

A critical outcome of the strategic planning process is the prioritization of IT investments. The plan should identify which projects, platforms, and initiatives warrant funding and attention based on their potential to deliver organizational value. This prioritization must be grounded in a realistic assessment of available resources, including:

- 1) **Current IT Budget:** A financial overview that supports strategic decision-making and ensures fiscal responsibility.
- 2) **Departmental Capacity:** An evaluation of staffing, skill sets, and operational bandwidth to execute the plan effectively.
- 3) **Governance and Accountability:** Clear roles, responsibilities, and oversight mechanisms to ensure transparency and alignment across departments.

Conclusion

Ultimately, an ITSP is not a static document but a living framework that guides the organization's technology journey. It empowers leadership to make informed decisions, fosters cross-functional collaboration, and ensures that IT serves as a strategic enabler of organizational success. By grounding technology initiatives in business value and aligning them with long-term goals, the plan becomes a catalyst for innovation, resilience, and continuous improvement.



IT Best Practices: A Strategic Imperative for Municipal Success

Information Technology (IT) best practices have evolved into a dynamic, strategic, and indispensable asset for modern organizations. For municipalities like East Palo Alto, these practices are not merely technical guidelines—they are foundational to achieving operational excellence, enhancing public service delivery, and ensuring long-term sustainability. Any organization implementing an ITSP must embrace these principles to guide consistent, informed, and future-ready technology decisions.

This framework outlines key strategies, desirable behaviors, and guiding principles rooted in industry best practices. It provides the criteria, constraints, and flexibility necessary to align technology investments with organizational goals, foster cross-departmental collaboration, and promote responsible innovation.

Key Strategies for Municipal IT Excellence

- Maximize Value Through Strategic Investment
 - Prioritize programs, business systems, and applications that deliver the greatest benefit to the City while optimizing human and financial resources.
- Advance Automation Across Core Functions
 - Develop both strategic and tactical approaches to leverage automation and Artificial Intelligence to streamline and optimize key municipal operations including documenting management, workflow coordination, predictive project management, data-driven decision making and enhanced interdepartmental collaboration.
- Enable Borderless Digital Government Services
 - Leverage digital portal platforms, websites, social media, kiosks, and mobile apps—to provide residents with seamless access to information and services, regardless of location or device.
- Modernize Selection and Implementation Practices
 - Align procurement and deployment policies with industry standards to enhance transparency, agility, and effectiveness in project evaluation and execution.
- Strengthen Network Security and Compliance
 - Continuously support cybersecurity initiatives and regulatory compliance to safeguard municipal systems and protect resident data.
- Empower Public Safety Through Technology
 - Invest in IT solutions that enhance the capabilities of public safety departments, enabling faster response times, improved coordination, and better protection for the community.



Desirable Behaviors That Foster IT Success

- Establish Collaborative IT Governance
 - Promote joint decision-making across departments through a formal governance structure that ensures alignment, accountability, and shared ownership of technology initiatives.
- Commitment to Disciplined Investment
 - Utilize dedicated funding mechanisms—such as internal service funds or asset replacement funds—to ensure sustained support for technology infrastructure and innovation.
- Encourage Business Ownership of IT Projects
 - Empower departments to lead and co-own IT initiatives, fostering engagement, problem-solving, and efficient use of staff resources.
- Favor Off-the-Shelf Solutions Over Custom Development
 - Adopt commercial off-the-shelf (COTS) software to reduce development time, lower costs, and benefit from vendor-supported upgrades and security.
- Promote Reuse and Enhancement of Existing Systems
 - Before replacing technology, evaluate opportunities to expand or improve current systems to maximize return on investment and minimize disruption.
- Ensure Program Sustainability
 - Every new or expanded IT initiative must include provisions for adequate staffing, infrastructure, and long-term support to ensure its success and resilience.

Guiding Principles for IT Governance and Strategy

- Commitment to Service Excellence
 - IT must be a catalyst for delivering high-quality, responsive services to residents and internal stakeholders.
- Support Business Needs to Serve the Community
 - Technology decisions should be driven by the operational needs of departments and the expectations of the public.
- Align Investments with Strategic Priorities
 - Focus IT spending on initiatives that support the City's strategic goals, adhere to standards, and promote system integration.
- Foster Responsible Technology Use Through Governance
 - Safeguard the City's and residents' data from unauthorized access, misuse, or breaches through robust security protocols and privacy practices.



- Protect Information Assets
 - Safeguard the City's and residents' data from unauthorized access, misuse, or breaches through robust security protocols and privacy practices.

✱ Additional Best Practices for Implementation Success

- Adopt Proven Frameworks Thoughtfully
 - Use reference frameworks such as Information Technology Infrastructure Library (ITIL), Control Objectives for Information and Related Technologies (COBIT), and International Organization for Standardization (ISO) to guide IT management. These frameworks offer valuable structure but should be adapted to fit the City's culture, scale, and operational realities.
- Secure Executive Sponsorship
 - Senior leadership must actively support IT initiatives by providing clear direction, mandate, and sustained commitment. Their involvement is critical to embedding governance and driving change.
- Focus on Quick Wins to Build Momentum
 - Prioritize achievable goals early in each project to demonstrate value, build trust, and maintain stakeholder engagement. Early successes reinforce long-term commitment and investment.
- Equip Teams with the Right Tools
 - Invest in modern, reliable tools that enable automation, streamline workflows, and support measurable service delivery improvements. Empowered teams deliver better results, faster.

Macro-Level Shifts: Digitization, Virtualization, and Value Creation

Across the municipal sector, activities, processes, and resources are rapidly being digitized and virtualized. This transformation is fueled not only by the exponential growth in computing capacity and network speed, but also by a broader shift toward wider demand. While early digitization efforts focused on cost avoidance and operational efficiency, today's imperative is to enhance customer value and implement more responsive systems.

Smart Communities: From Technology-Centric to Resident-Centric

One of the most visible trends affecting local governments is the rise of Smart Communities—defined as places where traditional networks and services are optimized through digital solutions for the benefit of residents and businesses. Historically, Smart Community initiatives have leaned heavily on technology infrastructure, often at the expense of resident engagement. However, the true promise lies in integrating public-facing services with internal digital transformation. Areas of focus typically include energy management, environmental sustainability, mobility, and civic engagement. Yet these external improvements are only possible when internal system finance, permitting, inspections, asset management—are modernized and interoperable.



Digital Transformation: A Foundational Imperative

Digital transformation refers to the holistic integration of digital technologies into all facets of an organization, fundamentally altering how value is created and delivered. For municipalities, this transformation has profound implications for residents, businesses, and other stakeholders. These interrelated trends are particularly salient:

- **Cloud Services:** Agencies are increasingly shifting from on-premises infrastructure to cloud-based platforms for applications, data storage, and network functions. This reduces the need for server management while introducing new costs and dependencies on third-party providers. It also unlocks access to modern, web-based applications that were previously out of reach.
- **Broadband as a Utility:** High-speed, always-on internet access is no longer a luxury—it is a prerequisite for digital transformation. Agencies without robust broadband infrastructure face significant disadvantages in service delivery, economic development, and civic inclusion.

Fiber Optics: The Backbone of Connectivity

Fiber optics have emerged as the gold standard for broadband deployment. Unlike wireless, cellular, or hybrid fiber-coaxial (HFC) networks, fiber offers unmatched speed, bandwidth, and reliability. Its ability to transmit light through ultra-thin glass strands minimizes latency and interference, making it essential for backhaul connectivity and future-proof infrastructure. Fiber's superiority is especially critical in environments where wireless signals are obstructed, or copper networks degrade performance.

Cybersecurity: The Non-Negotiable Foundation

As digital systems proliferate, so do vulnerabilities. Cybersecurity is no longer a technical afterthought—it is a strategic imperative. Operational technologies are particularly susceptible to exploitation, with risks ranging from data theft to system hijacking. Threats such as deepfakes, spoofing, and social engineering are increasingly sophisticated, targeting both individuals and institutions. Effective cybersecurity requires a blend of robust technologies, disciplined practices, and continuous education. Agencies must invest in training staff to recognize frauds, scams, enforce secure protocols, and build resilience against evolving threats.



Project Purpose and Process

Project Purpose

The City has initiated a five year Strategic Plan to provide clear direction for planning, procuring, implementing, and managing both current and future information technology investments. This effort is designed to establish a coherent vision and a practical roadmap for leveraging technology in support of the City's mission and long- term- service goals.



The Strategic Plan is intended to serve as the City's primary guide for aligning technological demand with available resources. By articulating priorities and defining a structured approach to modernization, the City aims to strengthen its ability to balance growing expectations for reliable, secure, and innovative technology services with the staffing and funding required to deliver them effectively.

Statement of Requirements Addressed

All requirements outlined in the scope of work have been fully satisfied through the development of the City's Information Technology Strategic Plan (ITSP). The engagement comprises the following core deliverables:

- Current State Assessment
- Gap Analysis
- Future State Roadmap
- Organizational Recommendations

Each deliverable incorporates the required ITSP elements, including comprehensive findings and analysis, evaluation of risks and benefits, detailed action matrices, cost and workload estimates, and phased implementation timelines.

Across these components, GTG has addressed all required content areas:

IT Strategy

Stakeholder interviews and focus groups with City leadership, department heads, and staff informed a set of actionable, service-delivery-focused recommendations spanning short-, mid-, and long-term horizons. The ITSP identifies opportunities to expand digital services, strengthen data-driven decision-making, promote equitable access, and evaluate emerging technologies—including AI, RPA, advanced analytics, and cloud-based tools. Sequences, cost considerations, and staffing implications are fully integrated.

IT Risk Assessment

The assessment applies recognized public-sector frameworks (NIST CSF, CIS Controls, ISO/IEC standards) to evaluate cybersecurity posture, resiliency, disaster recovery, business continuity, and backup procedures. Key vulnerabilities—including unsupported systems, single points of failure, outdated policies, and staffing limitations—are identified, with prioritized mitigation strategies and associated resource and cost requirements.

Technical Infrastructure

A comprehensive review of hardware, networks, storage, and cloud services has been completed, supported by a full inventory and condition assessment. The analysis evaluates scalability, interoperability, cybersecurity readiness, and alignment with municipal best practices. Recommendations address lifecycle



management, modernization of legacy systems, cloud adoption, and integration opportunities across enterprise platforms.

IT Organizational Structure and Personnel

The City's organizational structure, staffing levels, governance practices, and use of contracted services were evaluated to identify strengths and gaps. A role and skills assessment informs recommendations related to organizational improvements, staffing levels, role distribution, training and professional development, and the balance between internal staff and contracted resources. Change management considerations, phasing, and cost implications are included.

Collectively, these deliverables meet all requirements specified for the engagement and provide the City of East Palo Alto with a clear, actionable, and strategically aligned path for modernizing and strengthening IT service delivery.



Process

GTG conducted a comprehensive assessment of the City of East Palo Alto's Information Technology (IT) systems and service delivery model. GTG was able to execute a robust evaluation by leveraging on-site and virtual interviews, document reviews, and remote analysis of IT service delivery mechanisms.

The assessment aimed to provide a holistic understanding of the City's current IT environment, identify strengths and gaps in service delivery, and offer strategic recommendations aligned with industry standards and municipal best practices.

Methodology

GTG's approach was structured around three core activities.

1) Stakeholder Engagement:

- Interviews were conducted with a broad cross-section of City staff, including representatives from multiple departments and divisions. These sessions focused on understanding user experiences, service expectations, and satisfaction levels with current IT support.

2) Document and Infrastructure Review:

- GTG reviewed available documentation related to IT systems, policies, and procedures. This included network diagrams, staffing models, and technology inventories. The review provided insight into the operational framework and governance of IT services.

3) Comparative Research and Benchmarking:

- The City's IT service delivery model was benchmarked against industry best practices and peer municipalities of equivalent size, budget, staffing levels, and application portfolios. This comparative analysis helped identify opportunities for cost savings, operational efficiencies, and service enhancements.

Departmental Participation

All City departments and divisions actively participated in the assessment process. Each group contributed valuable perspectives through structured on-site and remote interviews, which were designed to elicit feedback on IT service quality, responsiveness, and alignment with departmental needs. These insights were instrumental in shaping the overall evaluation and identifying areas for improvement.



IT Organization Review

The review of the City's IT organization focused on evaluating its capacity to deliver reliable, secure, and responsive technology services. Key components of this review included:

Policy and Practice Alignment:

- GTG assessed the City's IT policies and operational practices against recognized industry standards to determine their adequacy and effectiveness.

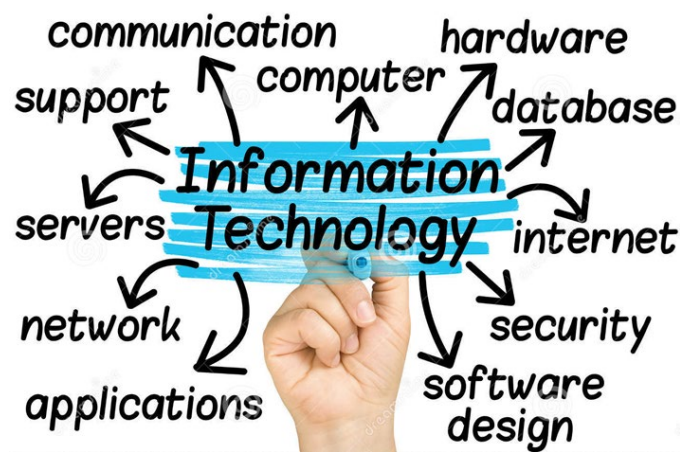
Technology Infrastructure Analysis:

- A remote evaluation of the City's existing technology infrastructure was conducted, including systems architecture, hardware and software assets, and network capabilities. This analysis helped identify potential vulnerabilities, redundancies, and modernization opportunities.

Staffing and Service Delivery Evaluation:

- Interviews with IT personnel provided insight into staffing levels, skill sets, workload distribution, and service delivery processes. GTG evaluated whether the current organizational structure and resources were sufficient to meet the City's evolving technology needs.

The assessment provided GTG with a detailed understanding of its current IT landscape and actionable recommendations for enhancing service delivery. By aligning with industry best practices and leveraging comparative insights, the City is well-positioned to improve operational efficiency, strengthen stakeholder satisfaction, and modernize its technology infrastructure in support of long-term strategic goals.



Information Technology Overview



Current State Overview

Infrastructure

The City of East Palo Alto operates an IT environment that reflects a functional architecture for a small municipality, but with several maturing elements that position it for greater resilience, modernization, and security. The environment blends traditional on-premise infrastructure with cloud-based services, balancing control over sensitive systems with the flexibility of modern SaaS platforms.

Transformation across critical areas range from workflow modifications to substantial organizational/operational shifts, and together they signal a clear need for focused, coordinated action. Each area represents an opportunity to strengthen the City's technology environment, enhance service delivery, and improve operational efficiency.

Core Infrastructure Overview

The City currently maintains a quasi-hybrid IT model that integrates locally hosted systems with cloud services. This approach supports operational continuity and allows departments to use modern tools without sacrificing control over critical data. The environment is anchored by several (albeit needing improvements) components:

- Network security technologies such as Next Gen Firewalls (NGFW), virtual private networks (VPN), and intrusion prevention, to protect internal systems.
- Structured backup and recovery workflows that safeguard data and support business continuity during outages or disasters.

Networking and Connectivity

Municipal operations rely on high-speed, secure fiber-optic connectivity linking City Hall, the Police Department, CEDD and Public Works at the Tate Street office, and other facilities. This connectivity is provided by an outside vendor and supported with:

- Enterprise-grade firewalls that enforce security policies and protect against external threats.
- Switches and routers that provide reliable internal connectivity and available VLAN segmentation for sensitive systems.
- VPN access for secure remote work, particularly for staff who manage confidential information.

This network backbone ensures that public safety systems, administrative applications, and public-facing services remain available and responsive.



Data Center and Server Environment

The City maintains a small, secure, climate-controlled on-premise server room that houses its core computing environment. Supporting functions:

- Server virtualization infrastructure – Efficiently deploy multiple solutions in a shared space.
- Environmental controls such as temperature regulation, fire suppression (wet), and physical access restrictions.
- Support for applications that require local hosting due to policy, performance needs, or data sensitivity.

This on-premise environment remains essential for systems that cannot/should not yet transition to the cloud.

Cloud Solutions

To improve operational efficiency and service delivery, the City uses a growing portfolio of cloud-based applications (SaaS). These solutions typically support:

- Finance, HR, Permitting, and other administrative functions.

Security and Compliance

The City's IT environment is governed by state and federal cybersecurity standards, including:

- NIST Cybersecurity Framework 2.0 .
- Criminal Justice Information Services (CJIS) v6.0 integrates NIST 800-53 r

Minimum set of security compliances for all Government agencies that manage criminal justice

- Regular patching, endpoint protection, and monitoring to reduce vulnerabilities.

These standards guide how systems are configured, how data is overseen, and how staff access is managed.

Disaster Recovery and Business Continuity

The City employs a multi-layered backup strategy that includes:

- On-site backups for rapid restoration of recently changed data.
- Off-site or cloud-based backups to protect against local disasters.



- Virtualized recovery options, enabling systems to be rebuilt on new hardware or in the cloud if needed.

While the City can recover from a major outage, the current process may require 24–48 hours on average **depending on the severity of the event and available resources**. Enhancing this capability—through more frequent snapshots, automated failover, and a unified Business Continuity/Disaster Recovery plan—would significantly improve resilience.



Strategic Considerations Moving Forward

As the City continues to modernize, several opportunities emerge:

- Upgrade Network Core to a modern architecture
- Revise all IT workflows to cover the larger IT operations and incorporate automation for efficiency
- Document standard operating procedure and comprehensive BC/DR (Business Continuity and Disaster Recovery) plan in the event of a cyber-attack.
- Create a true hybrid network for all beneficial cloud applications and on-premises systems.
- Revise network and cybersecurity monitoring. Document a process for executing Penetration (PEN) Testing and security audits for Internal IT and all systems in use by the City

Applications

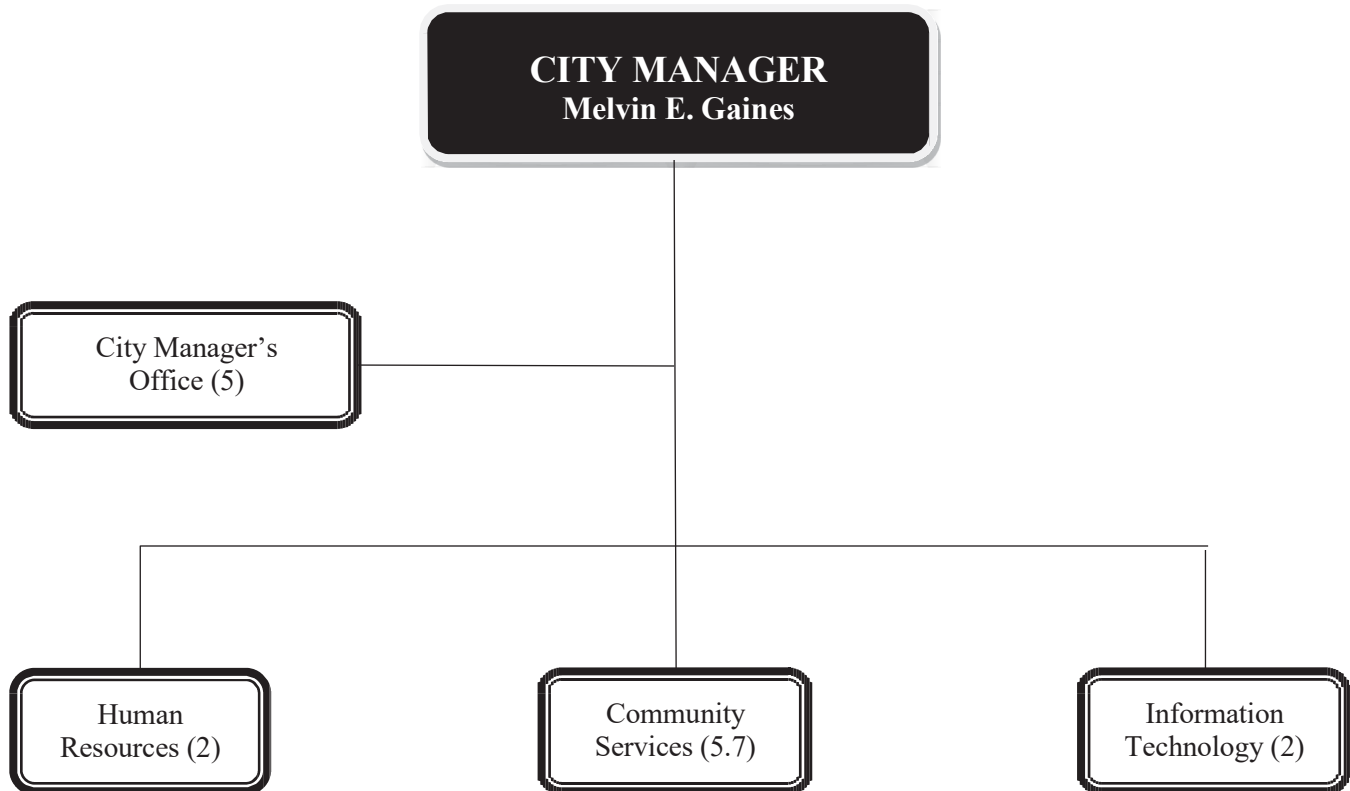
The IT team supports a broad ecosystem of business applications that collectively enable the City to conduct its operational and strategic objectives. This portfolio spans general-use platforms—including office productivity suites, collaboration tools, and other foundational applications used across all departments—as well as specialized systems designed to meet the unique functional requirements of individual service areas. These specialized tools often support mission-critical activities such as permitting, inspections, asset management, public safety operations, and community-facing services.

By maintaining, securing, and optimizing this diverse application environment, the IT team ensures that each system effectively contributes to the City's overarching business case, albeit work and resource intensive. Their work enables departments to operate efficiently, share information seamlessly, and deliver services in a manner that is consistent, transparent, and aligned with organizational goals. This combination of broad utility applications and targeted operational systems forms the backbone of the City's technology landscape and is essential to sustaining reliable, high-quality municipal service delivery.

These applications are listed in the accompanying Network and Security Plan furnished separately.



IT Management/Supervision



Staffing

The City's IT service delivery capacity is currently supported by two full-time positions: an Information Technology Manager and an Information Technology Specialist I/II. With a citywide workforce of 125.95 FTE, this equates to one IT FTE for every 63 staff members, a ratio that is significantly higher than typical benchmarks for municipal organizations of comparable size.

Stakeholder feedback consistently reflects high satisfaction with IT support and customer service. Departments describe the IT team as responsive, knowledgeable, and committed to meeting organizational needs. At the same time, interviews reveal a common concern: IT is significantly understaffed and lacks the resources necessary to fully support the City's growing operational and strategic demands.

In a workgroup of this size, the IT Manager is routinely required to perform tasks that would normally be assigned to technical support staff. This dynamic represents an inefficient use of managerial capacity and limits the Manager's ability to focus on higher-value responsibilities. To be effective, an IT Manager should be positioned to oversee operations and personnel, engage with departments to understand evolving needs, and lead strategic planning efforts that guide the City's technology investments and modernization initiatives. Without adequate staffing, these essential functions are constrained, reducing the City's ability to advance its technological environment in a proactive and sustainable manner.



Budget

The City budgets its information technology expenditures through the General Fund Reserve SubFund- for Information Services, which serves as the primary mechanism for accumulating resources to acquire, upgrade, and maintain technology assets. For fiscal year 2025-26, the total IT expenditure budget allocated is \$1,891,374, (which represents the Info Services Reserve Total Expenditures less Overhead Allocation). This total includes both ongoing IT operations (e.g., personnel, licensing, and support services) and project-related expenditures (e.g., system implementations, upgrades, and capital investments).

	General Fund F110	Info Services Reserve F111	Equipment and Vehicle Reserve F112	Insurance Reserve F113	Development Pass Through F117	Eliminating	Total
Expenditures							
City Council	264,605	7,500	-	-	-		272,105
City Attorney	1,340,060	1,000	-	70,000	50,000		1,461,060
City Clerk	462,550	118,678	-	-	-		581,228
City Manager	5,834,445	556,969	-	-	-		6,391,414
Finance	1,738,522	224,614	-	-	-		1,963,136
Community Development	3,722,148	60,806	-	-	500,000		4,282,954
Public Works	6,468,764	87,903	70,000	-	-		6,626,667
Police	15,996,413	270,244	120,500	-	-		16,387,157
Non-Departmental							
Major Capital	-	-	-	-	-		-
Insurance and Settlements	-	-	-	1,066,347	-		1,066,347
IT Operations	-	563,660	-	-	-		563,660
Other Non-Departmental	1,426,731	-	-	-	-		1,426,731
Overhead Allocation	(2,307,892)	(184,160)	-	(155,657)	-		(2,647,709)
Total Expenditures	34,946,346	1,707,214	190,500	980,690	550,000	-	38,374,750



The City's total operating budget for fiscal year 2025-26 is \$61,265,685 (which represents the City Total less Capital Improvement Funds and Overhead Allocation).

	General Fund and Internal Reserves	Special Revenue Funds	Capital Improvement Funds	Enterprise Funds	City Total	Successor Trust Fund	GRAND TOTAL
Expenditures							
City Council	272,105	-	-	7,500	279,605	-	279,605
City Attorney	1,461,060	42,500	-	47,000	1,550,560	1,400	1,551,960
City Clerk	581,228	-	-	-	581,228	-	581,228
City Manager	6,391,414	2,950,000	-	-	9,341,414	-	9,341,414
Finance	1,963,136	8,326	62,671	59,400	2,093,533	27,593	2,121,126
Community Development	4,282,954	2,866,133	-	-	7,149,087	-	7,149,087
Public Works	6,626,667	1,916,966	169,267	5,856,227	14,569,127	-	14,569,127
Police	16,387,157	320,000	-	-	16,707,157	-	16,707,157
Non-Departmental							
Capital/Technology	-	2,500,000	1,223,122	300,000	4,023,122	-	4,023,122
Insurance and Settlements	1,066,347	-	-	-	1,066,347	-	1,066,347
IT Operations	563,660		-	15,040	578,700	-	578,700
Other Non-Departmental	1,426,731	107,201	-	3,527,143	5,061,075	1,613,925	6,675,000
Overhead Allocation	(2,647,709)	855,802	190,210	1,584,413	(17,284)	17,284	-
Total Expenditures	38,374,750	11,566,928	1,645,270	11,396,723	62,983,671	1,660,202	64,643,873

The total IT operating budget of \$1,891,374 is 3.0% of the total City operating budget of \$61,265,685.



Key Issues



Issues

“IT Governance is the most important factor in generating business value from IT”

Peter Weill*, Director of the Center for Information Systems Research, CISR, and Senior Research Scientist at MIT Sloan School of Management

*Peter Weill, *IT Governance (Boston Massachusetts: Harvard Business School Press, 2004)*

Organizationally, it is recommended that the City implement several best practices. The City has formed an IT Governance Committee to assist in establishing organizational priorities related to technology. This committee should have a charter that addresses the critical need to keep the committee strategic and not allow delegation to staff by members of the group. GTG recommends creating a subgroup such as an IT Business Committee that is more technical and tactical in nature to provide regular updates on major technology projects and initiatives, evaluate IT technology's best practices and provide recommendations to the IT Executive Committee, and to serve as a technology operations coordination and communication vehicle among departments. The committee should be made up of subject matter experts and those with strong technical skills to test and evaluate innovative processes for the City. Along with governance, a detailed IT plan should be updated annually. A well-thought-out committee structure should be established to foster communication between disparate stakeholders who consume IT resources.

Proper use of IT Governance can leverage the ingenuity of the City of East Palo Alto's staff while ensuring compliance with the City's mission and guiding principles. Well-designed, well-understood and transparent mechanisms promote desirable IT behaviors, and senior management awareness of how IT governance works. An IT governance framework also has the added advantage of relieving IT from the position of being the sole decision maker of which projects or resources should have priority over others.

Developing a cohesive enterprise information governance discipline requires the work of many individuals and an unambiguous accountability structure to enforce clearly defined information policies and procedures. This becomes more important as technology investment costs rise, modern technologies rapidly come into the market, integrated information needs increase, and



regulatory requirements push organizations to start managing information as a business asset.

IT Governance is defined by five key decision types that specify who should be contributing and who will be authorizing. These decisions are governed by three primary governance mechanisms.

- The first and most visible are the decision-making structures. These are the organizational committees and roles that define where decisions are made.
- The second feature is formal communication and how IT governance decisions are made in the organization. Along with senior management support, Weill's study found that the more management communicated formally about the governance mechanisms, the more effective the governance.
- The third feature is the alignment processes. This is where input and recommendations are found, and this is where the action occurs. These are the budget process, project tracking, exception processing, and performance measures.

In the centralized IT operating model, all IT infrastructure and application services throughout an organization are delivered by a single internal IT organization. Innovation and efficiency are the desired goals of the IT system in every organization. In general, the centralized approach can promote a more efficient and controlled organization.

The ability to improve service delivery and uptime is often tied to technological advances and process improvements. From an IT perspective, business agility is often a product of streamlined decision making based on greater visibility of necessary data. It is considered a best practice for policy and governance to be centralized for optimum security and compliance.

Enterprise Systems

During the needs assessment departmental interviews, it quickly became apparent that the City does not take advantage of the productivity and transparency gains realized by many other cities that use modern enterprise-class systems for Land Management (including permitting, planning, and public works functions); Geographic Information Systems (GIS); and Enterprise Resource Planning (ERP) including all financial and human resources functions.

Most departments saw the need to reduce or eliminate current manual processes. Naturally, enterprise class systems can automate these processes, but they also remove information/data silos which allow departments across the organization to operate from a unified, real-time data source, enhancing transparency, accuracy and strengthening data-driven decision-making. The existence of different siloed systems and the lack of citywide availability of information was identified by all departments. It is inherently inefficient when only a single workgroup has access to information that should be available to all relevant staff members.

The current financial system, Caselle, requires manual effort and workarounds to perform the



most basic, minimum financial functions required. Most departments see it as siloed system lacking wider functionality such as approval workflow and human resources functionality.

The current permitting system, Trakit, performs basic permitting functions, but it is lacking wider functionality (such as online application submission, online payments, electronic plan review capabilities, online inspection scheduling and mobile inspection software, GIS integration, and workflow) available in modern planning/land use workflow software.

As a first step in acquiring and implementing these systems, a qualified consulting firm should be retained to perform a workflow and business process review effort—paired with a gap analysis and support in developing RFPs for a new ERP and Land Management System.

The City would also benefit from engaging a qualified GIS consultant to begin the process of building a centralized citywide GIS system that would be integrated with a new Land Management system.

Regarding other city-wide systems, every department identified redesigning the City website as a high priority, as well as replacing the back-end system used by staff for updating content, which was viewed as outdated and difficult to use.

The implementation of a 311/Constituent Relationship Management (CRM) system was mentioned by City Council and was also identified by every department as a critical need. A modern centralized system for all constituent interactions—including service requests, outreach, and follow-ups, with a mobile app for use by residents and businesses to report issues, is also a high priority.

The need to implement an Enterprise Asset Management system (EAM) was a priority for Public Works to track asset life, maintenance, and capital planning and budgeting. Doing so can provide significant cost savings in managing and maintaining our costly infrastructure.

Enhanced IT Strategic Priorities

Outlined below are issues and trouble areas uncovered through research and remote information gathering in response to the initial questions put forward by the City of East Palo Alto's request for proposal.

The key issues revealed in this report point to a need for:

- Strengthen IT staffing levels to align with recognized industry standards and ensure sustainable service delivery.
- Refine the formal IT Governance and Technical Business Committee's framework to guide decision-making, prioritization, and accountability.
- Increase and stabilize IT funding to meet industry benchmarks and support modern, reliable systems.
- Improve IT cost allocation methodologies to ensure transparency and equitable distribution of technology expenses across departments.
- Address significant training gaps by expanding professional development for IT staff and providing



- comprehensive end user training.
- Leverage external expertise and contracted resources to support complex projects and specialized systems.
 - Modernize and standardize hardware across the organization to improve performance, security, and user experience.
 - Conduct an evaluation of cloud services to identify opportunities for moving on-premise systems to a more scalability, resilience, and cost efficiency system.
 - Maintain all systems at current patch and update levels to strengthen security and operational stability.
 - Create enhanced GIS data management practices that ensure all departments have access to accurate, well maintained geospatial information within a single system.
 - Improve and consolidate document management capabilities to support efficient storage, retrieval, retention, and compliance.
 - Strengthen contract management processes to improve oversight, performance tracking, and vendor accountability.
 - Undertake a comprehensive, organization-wide business process review to streamline workflows and identify modernization opportunities.
 - Consider replacement of the City's ERP system to maximize functionality, reporting, and operational efficiency.
 - Consider replacement of the current land management system to support permitting, planning, and code enforcement.
 - Implement improved file management and collaborative document sharing practices using current systems such as SharePoint, Laserfiche, and other related tools.
 - Engage external subject matter experts to address specialized user needs and support complex operational requirements.
 - Expand and enhance public facing online services, including improved access to City financial data and digital service offerings.
 - Evaluate opportunities to expand broadband infrastructure to support Internet of Things deployments (IoT, which is a network of physical devices embedded with sensors, software and connectivity that allows them to collect, exchange, and act on data autonomously), Smart City initiatives (solutions leverage technology and data to enhance urban living, improve infrastructure, and promote sustainability and efficiency in city operations, including IoT, artificial intelligence, and big data analytics), and future innovation.



Information Technology Capability Gaps

Interviews and feedback from the City staff regarding their business systems, IT infrastructure and security identified several gaps between existing IT capabilities and the technology services required to support the organization's strategic priorities, operational efficiency, and service delivery expectations. Addressing these gaps will help modernize systems, improve cybersecurity, enhance user experience, and enable more data-driven decision-making.

1. Governance and Strategic Alignment

Current State:

Technology initiatives are often driven by immediate operational needs rather than a coordinated governance structure.

Gap:

Lack of a mature formal IT governance framework to prioritize technology investments, manage risk, and align projects with organizational objectives.

Desired State:

A structured IT governance model that includes executive oversight, project prioritization processes, and clear decision-making authority. This includes creating a charter for the IT Executive Committee that will oversee strategy and an IT Business Committee that will review technical needs of the City for standardization, innovation and taking advantage of in-house expertise.

Impacts if Unaddressed:

Without a formal governance structure, technology decisions may continue to be made in a reactive and decentralized manner, leading to inconsistent priorities, duplication of systems, and inefficient use of resources. The City may experience increased cybersecurity and operational risks due to lack of coordinated oversight and standards. Additionally, technology investments may not align with broader organizational goals, limiting the City's ability to modernize services, improve operational efficiency, and effectively support long-term strategic initiatives.

Projects that address the Gap: **SCORING – 9-10 Critical/ 7-8 High/ 1-6 Moderate**

#	Project Name	Rationale	Score
1	IT Executive Committee Charter and Governance Framework	Establishes formal decision-making authority, escalation paths, and executive accountability for technology investments. Eliminates reactive, siloed decision-making by creating a structured two-tier committee model (Executive oversight + IT Business Committee). Directly aligns technology with organizational strategic objectives	9/10 Critical



#	Project Name	Rationale	Score
2	Technology Management Platform	Implements a centralized system for monitoring all IT projects, resource allocation, and ROI/Cost avoidance. Enforce prioritization across departments	8/10 High
3	Annual Technology Strategic Plan (5yr Roadmap)	Creates a publicly accountable technology roadmap aligned to the City's capital improvement program and community goals, which enables proactive budgeting rather than reactive spend	9/10 Critical

BEST PRACTICE -

- COBIT 2019 – Enterprise IT Governance
- ISO/IEC 38500 Principles for governing IT investments
- PMBOK Framework guides project prioritization and portfolio governance

2. Application Modernization

Current State:

Several business systems are aging, siloed, or require significant manual processes and workarounds.

Gap:

Limited integration between systems and reliance on legacy applications that reduce efficiency and increase maintenance costs.

Desired State:

Modern, integrated applications that support digital workflows, improve data sharing across departments, reduce manual effort, and take advantage of AI advances once the City's application foundation and data quality are in place.

Impacts if Unaddressed:

If application modernization is not addressed, the City will likely continue to experience inefficiencies caused by duplicate data entry, manual workarounds, and limited information sharing between departments. Aging systems may become increasingly difficult and costly to maintain, and vendor support may diminish over time, increasing operational risk. In addition, the City's ability to improve service delivery, implement digital services, and leverage emerging technologies such as automation and artificial intelligence will be constrained by fragmented systems and inconsistent data. Over time, this may also result in reduced staff productivity, slower decision-making, and increased frustration for both employees and residents who rely on City services.



Projects that address the Gap:

#	Project Name	Rationale	Score
1	Application Portfolio and Assessment Rationalization	A comprehensive audit of all business systems using the TIME model identifies quick win eliminations, consolidation opportunities, and migration candidates. Without this baseline, modernization investment risks being misallocated	9/10 Critical
2	Enterprise Integration Platform/API Gateway	Deploys middleware (Mulesoft, Azure API Management) to connect siloed applications without full replacement. Enables real-time data sharing between HR, Finance, and other organizations. This is the layer that makes AI and analytics initiatives viable	8/10 High
3	ERP Core Platform Upgrade or Replacement	ERP Systems are the most significant bottleneck to digital transformation – Evaluation and execution to a system e.g., Oracle Cloud, Workday will eliminate manual workarounds, consolidate redundant systems, and provide a single source of truth for Finance, HR, and operational data	8/10 High

BEST PRACTICE –

- TOGAF (The Open Group Architecture Framework) Methodology for application portfolio rationalization
- ISO/IEC 205010 – Defines quality characteristics for modern software systems
- TIME Model (Tolerate, Invest, Migrate, Eliminate) Guides prioritization of legacy vs modern systems

3. Data Management and Analytics

Current State:

Data is stored across multiple systems with limited centralized reporting or analytics capabilities.

Gap:

Inconsistent data governance, limited reporting capabilities beyond manual use, and insufficient ability to leverage data for decision-making.

Desired State:

A centralized data strategy with improved reporting, dashboards, and analytics capabilities to support operational and strategic decision-making.



Impacts if Unaddressed:

If improvements to data management and analytics are not made, the City will continue to rely on fragmented and manually compiled information to support decision-making. This can result in inconsistent reporting, reduced confidence in data accuracy, limited visibility into operational performance and lack of trust and transparency for the community. Departments may spend considerable time gathering and reconciling data rather than analyzing it to inform policy and operational improvements. Additionally, the City's ability to identify trends, measure program outcomes, and make data-driven decisions will remain limited, potentially affecting service delivery, financial planning, and strategic initiatives. Over time, the lack of a coordinated data strategy may also hinder the City's ability to support transparency, performance management, and future technologies that rely on high-quality, well-governed data.

Projects that address the Gap:

#	Project Name	Rationale	Score
1	Enterprise Data Governance Program	Establishes data stewardship roles, data dictionary, lineage tracking, and quality standards across all departments. Governance is the prerequisite that determines whether all downstream analytics investments succeed or fail	10/10 CRITICAL
2	Data warehouse/Data Lake implementation	Centralizes structured and unstructured data from all City systems into a single analytical environment (e.g., Azure Synapse, Snowflake, or AWS Redshift). Eliminates manual Excel-based reporting, enables cross-departmental analytics, and provides the data foundation for AI and predictive modeling.	9/10 CRITICAL
3	Business intelligence (BI) and Executive dashboard platform	Deploying a self-service BI tool e.g., Power BI, Tableau connected to trusted and governed data sources replaces manual report compilation for operational performance, financial status and other KPI's. Reducing report cycle from days to minutes	9/10 CRITICAL

BEST PRACTICE –

- DAMA-DMBOK - Data Management Body of Knowledge is the authoritative guide for enterprise data governance practices.
- ISO 8000 - defines data quality standards critical for analytics integrity.
- The NIST Privacy Framework - governs how resident data is managed in centralized data environments.



4. Infrastructure and Cloud Readiness

Current State:

A mix of on-premises and cloud solutions exists, but cloud adoption is not guided by a formal strategy.

Gap:

Limited scalability and inconsistent architecture standards for infrastructure and cloud services.

Desired State:

A well-defined hybrid or cloud-first strategy that improves scalability, resilience, and disaster recovery capabilities.

Impacts if Unaddressed:

If infrastructure and cloud readiness are not addressed, the City may face challenges in scaling systems to meet growing demands, leading to performance bottlenecks and service disruptions. Inconsistent architecture and lack of standardization can increase complexity, operational inefficiencies, and maintenance costs. Without a formal cloud strategy, disaster recovery and business continuity capabilities may be limited, leaving critical systems vulnerable to downtime during outages or disasters. Over time, failure to modernize infrastructure may also hinder adoption of modern technologies, reduce agility in responding to community needs, and increase long-term IT costs.

Projects that address the Gap:

#	Project Name	Rationale	Score
1	Hybrid Cloud Strategy & Architecture Blueprint	Defines which workloads belong on-prem, in public cloud (GovCloud), or in a hybrid model, with total cost of ownership analysis for each. Without this blueprint, cloud migration proceeds inconsistently, creating technical debt, security gaps, and unpredictable costs. This is the architectural foundation for all subsequent infrastructure investments.	9/10 CRITICAL
2	Network Infrastructure Modernization (SD-WAN / SASE)	Software-Defined WAN and Secure Access Service Edge replace aging MPLS-based connectivity with dynamic, cloud-optimized routing. Enables secure split-tunneling for cloud applications, improves performance for remote workers, and reduces WAN costs by 30-50% while increasing resilience. Critical for cloud-first strategy success.	8/10 HIGH



3	GovCloud Migration Program (Prioritized Workloads)	A phased migration of email, collaboration, backup, and development environments to Azure Government or AWS GovCloud reduces on-premises hardware dependency, improves scalability, and moves capital expenditure to predictable operational expenditure. Cybersecurity & Infrastructure Security Agency (CISA)-compliant cloud environments also improve security posture.	8/10 HIGH
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BEST PRACTICE –

- NIST SP 800-146 - provides the authoritative cloud computing taxonomy and deployment model guidance for government entities.
- ISO/IEC 17788 - defines the cloud computing vocabulary and conceptual model.
- CSA STAR - provides a certification framework for assessing cloud provider security.

5. Digital Services and Customer Experience

Current State:

Some services require manual processes or in-person interactions.

Gap:

Limited digital service options and online self-service capabilities for customers and stakeholders.

Desired State:

Expanded digital services, improved online portals, and modern communication tools that enhance customer engagement and accessibility.

Impacts if Unaddressed:

If digital services and customer experience gaps are not addressed, residents and stakeholders may continue to face inefficient, time-consuming, and inconsistent service interactions. Manual or in-person processes limit accessibility, reduce convenience, and may frustrate customers, potentially lowering public satisfaction and trust. The City may also miss opportunities to streamline internal workflows, increase staff productivity, and reduce operational costs. Over time, failure to modernize digital services could hinder adoption of emerging technologies, limit data-driven insights from customer interactions, and put the City at a competitive disadvantage compared to other municipalities offering more modern, user-friendly digital experiences.

Projects that address the Gap:



#	Project Name	Rationale	Score
1	Unified Resident Self-Service Portal	A single, authenticated web and mobile portal enabling residents to pay bills, apply for permits, submit service requests, and check case status 24/7 eliminates in-person and phone bottlenecks. Municipalities with mature self-service portals report 40-60% reduction in counter and call center volume. Dramatically improves resident satisfaction and staff productivity simultaneously.	9/10 CRITICAL
2	Online Permitting, Licensing & Inspection System	Digitizing the permitting lifecycle (application, payment, review, inspection scheduling, certificate issuance) reduces processing time from weeks to days and eliminates paper-based workflows in Public Works, Planning, and Building departments. Directly generates measurable economic development impact by accelerating construction and business licensing timelines.	9/10 CRITICAL
3	CRM / 311 Service Request Management Platform	A modern CRM system (e.g., Salesforce Government Cloud, Microsoft Dynamics 365, or Salesforce) routes resident service requests to the correct department, tracks resolution status, and provides performance reporting. Eliminates lost requests, reduces duplicate effort, and provides data to identify highest-volume service pain points.	8/10 HIGH
4	Digital Accessibility Audit & Remediation Program	A systematic audit of all public-facing digital properties against WCAG 2.1 AA standards, followed by a prioritized remediation program, ensures the City meets ADA Section 508 obligations and serves all residents equitably — including those with visual, auditory, and motor disabilities. Mitigates significant legal liability.	8/10 HIGH

BEST PRACTICE –

- WCAG 2.1/2.2 - ensures digital services are accessible to residents with disabilities, a legal requirement under ADA Section 508.
- ISO 9241- provides human-centered design principles for government portals.
- USWDS - (U.S. Web Design Systems) provides a proven, research-backed component library specifically for government digital services.



6. Workforce and IT Capacity

Current State:

IT staff focus heavily on operational support and system maintenance.

Gap:

Limited capacity to focus on innovation, strategic initiatives, GIS, and emerging technologies. Related to GIS, the City has limited capabilities including:

- Incomplete data
- Data quality
- Unresolved data needs
- Lack of GIS best practices
- Limited capacity to focus on innovation, strategic initiatives, and emerging technologies.

Desired State:

An IT workforce with the resources, skills, and tools needed to support modernization, cybersecurity, and strategic technology initiatives either with in-house staff or consultant expertise to fill gaps in expertise that do not require full time assistance.

Impacts if Unaddressed:

If workforce and IT capacity gaps are not addressed, the City's IT team may remain overextended on routine operational tasks, limiting their ability to pursue innovation, modernization, and strategic projects. Critical initiatives such as implementing modern technologies, improving cybersecurity, or optimizing workflows could be delayed or executed poorly due to lack of expertise and bandwidth. This may result in slower adoption of digital services, reduced efficiency, and increased reliance on outdated systems. Over time, insufficient IT capacity can lead to higher risk of system failures, security incidents, and missed opportunities to leverage technology for improved service delivery, ultimately impacting both staff productivity and community satisfaction.



Projects that address the Gap:

#	Project Name	Rationale	Score
1	IT Skills Assessment & Workforce Development Roadmap	A structured skills inventory against Skills Framework for the Information Age (SFIA, which is a global framework that defines the skills and competencies required by professionals in the digital world, particularly in information and communication technologies) competency levels across all IT roles identifies specific gaps in cybersecurity, cloud, data engineering, and GIS. Produces a targeted training investment plan, eliminating the inefficiency of generic training that does not address actual capability shortfalls. Directly reduces consultant dependency and builds institutional knowledge.	8/10 HIGH
2	GIS Platform Modernization & Specialist Capacity	Geographic Information Systems are foundational to Public Works, Planning, utilities, emergency management, and community engagement. Modernizing to ArcGIS Enterprise Online or QGIS with dedicated GIS specialist capacity unlocks spatial analytics capabilities that directly support infrastructure planning, 311 routing, and community services optimization.	8/10 HIGH
3	Managed Service Provider (MSP) Partnership for Strategic Gap Coverage	Engaging a vetted MSP or virtual CIO service for specific functions (cloud architecture, cybersecurity, application development) fills expertise gaps that do not justify a full-time hire. Provides access to specialist talent at a fraction of direct employment cost, with scalability to increase or decrease engagement as needs evolve.	7/10 HIGH
4	IT Career Ladder, Succession Planning & Retention Program	The public sector faces severe competition from private industry for technology talent. A formal career ladder with clear advancement criteria, competitive compensation benchmarking, and a structured succession plan for critical roles reduces turnover risk and ensures institutional knowledge is retained. High IT staff turnover is among the most disruptive and costly non-cyber risks a municipality faces.	8/10 HIGH

BEST PRACTICE –



- SFIA - provides a globally recognized 7-level competency framework for IT roles, enabling objective skills gap analysis and career pathing.
- IEEE 1484 - defines competency standards for technology professionals.
- CompTIA's - Government framework addresses public-sector-specific skills requirements including security clearances, procurement, and policy compliance.

7. Automation and Emerging Technologies

Current State:

Many processes remain manual or require redundant data entry across systems.

Gap:

Limited use of automation, artificial intelligence, and workflow tools to improve efficiency.

Desired State:

Increased use of automation, workflow platforms, and AI-enabled tools to streamline operations and improve service delivery.

Impacts if Unaddressed:

If automation and emerging technology gaps are not addressed, the City will continue to rely on manual, repetitive processes that consume staff time and increase the likelihood of errors. Opportunities to improve operational efficiency, reduce costs, and accelerate service delivery will be missed. Departments may struggle to respond quickly to changing demands or leverage data for decision-making. Over time, the lack of adoption of AI and workflow tools can hinder innovation, slow digital transformation efforts, and reduce the City's ability to provide modern, responsive services to residents and stakeholders. Additionally, staff may experience increased workload and frustration due to inefficient processes. This could result in high staff turnover and stagnation in customer service.

Projects that address the Gap:

#	Project Name	Rationale	Score
1	Robotic Process Automation (RPA) Center of Excellence (CoE)	Establishing an RPA CoE with a platform (e.g., UiPath, Microsoft Power Automate, or Automation Anywhere) and a prioritized automation backlog targets the highest-volume repetitive processes first — data entry, report generation, form processing, and invoice matching. Municipalities typically achieve 60-80% time reduction on automated processes, freeing staff for higher-value work.	8/10 HIGH



#	Project Name	Rationale	Score
2	Low-Code / No-Code Workflow Automation Platform	Platforms like Microsoft Power Platform or ServiceNow enable business users to build department-specific workflows, approval chains, and forms without IT involvement. This democratizes automation, reduces the IT development backlog, and accelerates digital transformation across departments that lack dedicated technical staff.	8/10 HIGH
3	AI Readiness Assessment & Responsible AI Governance Framework	Before deploying AI tools, the City must assess data quality, establish bias auditing processes, define acceptable use policies, and ensure compliance with Institute of Electrical and Electronics Engineers (IEEE) 7000 and emerging state AI regulations. This governance-first approach prevents the reputational and legal risks of algorithmic decision-making errors in public service contexts.	9/10 CRITICAL
4	AI Pilot Projects: Chatbot / Virtual Assistant & Predictive Maintenance	A resident-facing AI chatbot (integrated with the self-service portal) manages routine inquiries 24/7, reducing call center load. A predictive maintenance model applied to fleet, HVAC, and infrastructure sensor data shifts maintenance from reactive to proactive, measurably reducing emergency repair costs. Both are high-ROI; low-risk AI applications appropriate as municipal AI pilot programs.	8/10 HIGH

BEST PRACTICE –

- IEEE 7000 - provides the ethical framework for AI system design in public-sector contexts where algorithmic decisions affect residents.
- ISO/IEC 42001- is the first international standard for AI management systems, establishing governance for responsible AI deployment.
- Gartner's RPA Center of Excellence framework - guides scalable automation program governance.

8. IT Investment – Replacement Fund and IT Budget

Current State:

The City's information technology environment relies on a wide range of hardware, software systems, infrastructure, and cybersecurity tools that support core municipal operations and public services. While



many of these technologies are critical to daily operations, funding for lifecycle replacement and modernization has historically been addressed on an ad hoc or project-by-project basis rather than through a structured, sustainable funding model.

Departments are currently making independent decisions about when to replace technology based on their own budgets and informal judgment, rather than following standardized lifecycle guidelines. This lack of consistency leads to inefficient use of resources and avoidable waste.

The current IT operating budget primarily supports ongoing operational costs such as licensing, maintenance agreements, telecommunications services, and limited equipment replacement. However, it does not consistently include dedicated lifecycle funding for major infrastructure components, enterprise systems, or emerging technology investments.

Gaps:

Several gaps exist between the current funding approach and industry best practices for sustainable technology management:

- **Lack of a Centralized Dedicated Technology Replacement Fund:** There is no formalized replacement fund to support the planned lifecycle replacement of servers, network equipment, end-user devices, and critical infrastructure. Current purchases by departments are done in a siloed manner resulting in potential waste of limited resources. The lack of a central formalized replacement fund limits the City's ability to plan and fund equipment replacements on a systematic and predictable basis.

Assets Typically Included in a Replacement Fund

- **End-User Devices**
 - Desktops, laptops, tablets
 - Mobile devices (city-issued)
- **Infrastructure**
 - Servers (on-prem or hybrid)
 - Storage systems
 - Network equipment (switches, routers, firewalls, wireless access points)
- **Security Tools**
 - Endpoint protection
 - SIEM/log management systems
 - Backup and disaster recovery solutions
- **Telecommunications**
 - Phone systems (VoIP infrastructure)
 - Call center platforms
- **Enterprise Systems & Software**
 - ERP/financial systems
 - Permitting, utility billing, public safety systems
- **Specialized / Departmental Systems**
 - GIS platforms



- SCADA
- Body cams, Radios, or other public safety tech

Standard Lifecycle (Replacement Schedules)

Lifecycle definitions are the backbone of the fund. Typical ranges:

- **Desktops:** 4–5 years
 - **Laptops:** 3–4 years
 - **Tablets/Mobile Devices:** 2–3 years
 - **Servers:** 4–6 years
 - **Storage Systems:** 5–7 years
 - **Network Equipment:** 5–7 years
 - **Security Appliances (Firewalls, etc.):** 4–6 years
 - **Enterprise Software:** 5–10 years (major upgrades/replacements)
 - **Telephony Systems:** 7–10 years
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- **Limited Lifecycle Planning:** Technology assets are not consistently funded based on standardized lifecycle schedules, increasing the risk of aging equipment and deferred replacement.
 - **Reactive Budgeting:** Technology investments are often addressed reactively when systems fail, become unsupported, or require urgent upgrades rather than through proactive planning.
 - **Insufficient Base Budget for Strategic Initiatives:** The current base IT budget primarily supports maintenance and operational activities, leaving limited capacity for training, modernization, innovation, cybersecurity enhancements, and emerging technologies such as artificial intelligence or advanced analytics.
 - **Increased Risk Exposure:** Deferred replacements and underfunded modernization increase risks related to system reliability, cybersecurity vulnerabilities, vendor support limitations, and service disruptions.
 - **Unpredictable Capital Demands:** Without structured replacement planning, large technology expenses may arise unexpectedly, creating budget volatility and competing with other capital priorities.

Desired State:

A sustainable funding framework should be established to support both the **ongoing operational needs of the IT environment and the planned lifecycle replacement of technology assets.**

This includes:

- Establishing a **Technology Replacement Fund** or **Internal Service Fund** to support predictable lifecycle replacement of infrastructure and devices.
- Developing **multi-year technology lifecycle schedules** aligned with industry standards.
- Expanding the **base IT operating budget** to include recurring funding for cybersecurity, cloud services, data management, and emerging technologies.
- Implementing **long-range technology financial planning** aligned with the City's Capital Improvement Program (CIP) and strategic priorities.



- The fund should be refilled on an annual basis to ensure sustainability and withstand economic fluctuations.

Impacts if Unaddressed:

If these gaps remain unaddressed, the City may experience increasing operational risks, higher long-term costs due to emergency replacements, reduced ability to adopt modern technologies, and potential disruptions to critical municipal services. Deferred modernization and limited funding for emerging technologies hinder innovation, reduce operational efficiency, and increase cybersecurity and compliance risks. Over time, inadequate IT investment can erode system reliability, constrain the City's ability to implement strategic initiatives, and compromise the long-term sustainability of technology infrastructure and services.

Projects that address the Gap:

#	Project Name	Rationale	Score
1	Technology Replacement Fund (Internal Service Fund) Establishment	A formally established Internal Service Fund with annual contributions calculated from asset lifecycle schedules eliminates reactive, emergency technology spending. Funded from departmental chargebacks, this model makes technological costs predictable, equitable, and self-sustaining. Government Finance Officers Association (GFOA) and International City Management Association (ICMA) both recommend this structure as a best practice for municipal IT sustainability.	10/10 CRITICAL
2	IT Asset Management (ITAM) System & Lifecycle Inventory	Deploying an ITAM platform (e.g., Lansweeper, ServiceNow ITAM, or Ivanti) that tracks every hardware and software asset with purchase date, warranty status, support end-of-life, and replacement date provides the data foundation for lifecycle fund contributions and procurement planning. Without this inventory, lifecycle planning is guesswork.	9/10 CRITICAL
3	Multi-Year IT Capital Improvement Plan (CIP Integration)	Formally integrating IT capital needs into the City's 5-year Capital Improvement Program ensures technology investments compete on equal footing with physical infrastructure projects. Provides the City Council and Finance with a predictable horizon of technology capital requirements and eliminates budget volatility caused by deferred replacement.	9/10 CRITICAL



4	IT Total Cost of Ownership (TCO) Model & Chargeback Framework	Developing a transparent TCO model for each major system — including licensing, support, infrastructure, and staff time — enables fair departmental chargeback, accurate make-vs-buy analysis, and cost-justified modernization decisions. Departments that see the actual cost of aging systems are significantly more willing to fund modernization initiatives.	8/10 HIGH
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BEST PRACTICE –

- ISO 55000 - establishes systematic asset lifecycle management aligned to financial planning.
- ITIL 4's (Information Technology Infrastructure Library version 4) - Financial Management for IT practice provides service-based cost modeling and chargeback frameworks.
- GFOA (Government Finance Officers Association) - best practices specifically address technology replacement fund structures, lifecycle schedules, and capital improvement program integration for municipalities.

9. Local Government Project Management

Current State:

Project management practices across the organization are largely decentralized and inconsistent. Individual departments manage projects using their own methods, tools, and documentation standards. While some projects utilize basic planning documents or schedules, there is no standardized project management framework, governance model, or enterprise-level visibility into project portfolios.

Project prioritization, resource allocation, and project reporting are often performed informally or within departmental silos. There is limited use of standardized templates, project lifecycle methodologies, or centralized reporting dashboards. As a result, executive leadership may have limited visibility into project status, risks, interdependence, budget versus actual expenditures, and overall project performance; currently, this process is completely manual (as in the strategic priorities excel spreadsheets) or communicated verbally from employee to supervisor.

This environment is common in many local governments where project management practices evolve organically without formal governance or methodology.

Gap:

The City lacks a formal, enterprise-wide project management framework to ensure consistent planning, execution, monitoring, and reporting of projects.



Key gaps include:

- No standardized **project management methodology or lifecycle framework**
- Lack of **centralized project governance or Project Management Office (PMO)**
- Limited **enterprise visibility into project portfolios, priorities, and resource utilization**
- Inconsistent **project documentation, change management, and reporting practices**
- Lack of standardized **project performance metrics and dashboards**

Without formal governance and processes, projects may be initiated and managed without clear prioritization, consistent oversight, or coordination across departments.

Desired State:

The City will establish a standardized, enterprise-wide project management framework that enables consistent planning, governance, execution, and oversight of municipal projects.

Key elements of the desired state include:

- Implementation of a **formal project management methodology** (e.g., PMI)
- Establishment of a **centralized PMO or project governance structure**
- Standardized **project lifecycle stages** (initiation, planning, execution, monitoring, and closeout)
- Implementation of **prioritization processes**
- Centralized **portfolio management and reporting dashboards**
- Standardized **templates, documentation, and project tracking tools**
- Improved **cross-department coordination and resource management**
- Alignment of projects with **strategic goals, capital improvement plans, and council priorities**

A structured PMO approach enables local governments to coordinate complex projects across departments, improve accountability, and ensure projects remain aligned with organizational priorities.

Impact if Unaddressed

If this gap is not addressed, the City may experience increasing challenges in managing projects effectively across the organization.

Potential impacts include:

- Increased risk of **project delays, cost overruns, or scope changes**
- Limited visibility for leadership into **project progress, risks, and resource demands**
- Inefficient use of staff resources due to **duplicate or uncoordinated projects**
- Overburdened staff **working on too many projects at same time**
- Reduced ability to **prioritize projects aligned with strategic goals**



- Difficulty managing **large or complex initiatives such as capital improvement, technology modernization, or digital transformation projects**
- Reduced accountability and transparency in the use of public funds
- Loss of institutional knowledge due to inconsistent project documentation

Over time, the lack of standardized project management practices may hinder the City's ability to deliver major initiatives efficiently and effectively.

Projects that address the Gap:

#	Project Name	Rationale	Score
1	Project Management Office (PMO) Establishment & Charter	Establishes a formal PMO with a clear charter defining scope, authority, governance structure, and reporting relationships. The PMO serves as the organizational hub for project standards, portfolio visibility, and cross-department coordination. Without a PMO, all other PM investments lack an owner and enforcement mechanism. Municipalities with a functional PMO consistently deliver projects closer to schedule and budget than those without.	10/10 CRITICAL
2	Enterprise Project Management Methodology (PMI PMBOK Adoption)	Standardizes the project lifecycle — initiation, planning, execution, monitoring, and closeout — across all departments using PMI PMBOK 7th edition as the governing framework. Provides a common language for project communication, consistent expectations for deliverables at each stage, and defensible documentation practices that protect the City in audits, grant reporting, and public accountability contexts.	10/10 CRITICAL
3	Project Portfolio Management (PPM) Platform Implementation	Deploys a centralized PPM tool (e.g., Microsoft Project Online, Smartsheet Gov, or ServiceNow SPM) providing executive leadership with real-time visibility into all active projects, resource allocation, budget status, schedule health, and risk indicators. Eliminates the current state of fragmented spreadsheets and informal status reports. Enables data-driven prioritization decisions and prevents staff overloading.	9/10 CRITICAL



#	Project Name	Rationale	Score
4	Project Prioritization Framework & Annual Portfolio Review Process	Implements a scored prioritization model that evaluates all proposed projects against strategic alignment, cost, risk, resource impact, and community benefit before approval. Establishes an annual portfolio review cycle tied to the budget and CIP process. Currently, projects are initiated without consistent criteria, leading to resource conflicts, unfinished initiatives, and misalignment with Council priorities.	9/10 CRITICAL
5	Standardized Project Templates, Documentation & Lifecycle Toolkit	Develops and deploys a complete library of standardized project templates: project charters, RACI matrices, risk registers, change control forms, status report formats, lessons learned templates, and closeout checklists. Eliminates the current inconsistency where each department invents its own documentation. Templates reduce the administrative burden on project managers while ensuring all critical information is captured consistently.	9/10 CRITICAL
6	Executive Project Dashboard & Portfolio Reporting System	Builds a role-based executive dashboard providing City Manager and Council with a real-time portfolio health view — schedule performance, budget variance, milestone status, and risk flags — across all active projects. Replaces informal verbal updates and disconnected spreadsheets with a single authoritative source. Increases accountability, enables early intervention on at-risk projects, and demonstrates responsible stewardship of public funds.	9/10 CRITICAL
7	Resource Capacity Management & Workload Balancing Program	Implement a formal resource capacity management process that maps staff availability against project demand before projects are approved. Directly addresses the identified gap of overburdened staff working on too many projects simultaneously. Prevents the common municipal failure mode where ambitious project portfolios stall because the same small group of subject matter experts is assigned to too many initiatives at once.	8/10 HIGH



#	Project Name	Rationale	Score
8	Change Management Framework for Technology & Organizational Projects	Establishes a formal change management discipline — covering stakeholder analysis, communication planning, training coordination, and adoption measurement — for all significant technology and organizational change initiatives. Technology projects that lack change management consistently underperform adoption and ROI. This is especially critical for the City's ERP, GIS, and digital services transformations planned across the 5-year roadmap.	8/10 HIGH
9	Project Management Training & Certification Program for City Staff	Delivers role-based PM training aligned to PMI standards for all staff involved in managing or supporting projects — from department directors approving projects, to project leads executing them, to IT staff managing technical workstreams. Includes a pathway for key staff to achieve PMP or CAPM certification. Builds internal PM capability that reduces dependence on external consultants for project governance.	8/10 HIGH
10	Lessons Learned Repository & Continuous Improvement Program	Creates a structured lessons learned repository capturing outcomes, risks that materialized, decisions made, and improvement recommendations from every completed project. Feeds directly into the annual methodology review cycle. Prevents the recurring pattern where the same project management mistakes are repeated across departments because institutional knowledge is never captured or shared.	8/10 HIGH

BEST PRACTICE –

- PMI PMBOK 7th Edition - This is the authoritative project management standard providing principles-based guidance applicable to government project portfolios of all sizes.
- PRINCE2 Agile - Provides a complementary framework for technology and iterative projects common in digital transformation programs.
- ISO 21502 - This is the international standard for project management guidance, providing language-neutral definitions and process guidance.
- ICMA (International City/County Management Association) - Provides local-government-specific PM guidance addressing the unique constraints of public sector project delivery including procurement, public accountability, and cross-departmental coordination.



10. GIS Capability Gap Analysis

Current State:

The City's Geographic Information Systems (GIS) capabilities are limited and decentralized. GIS usage is primarily restricted to basic mapping functions, with minimal integration into core business processes. Data is often siloed across departments, inconsistently maintained, and in some cases managed through manual or non-spatial tools such as spreadsheets. There is limited staff expertise dedicated to GIS, and existing tools are underutilized with a lack of standards. Public-facing GIS services, such as interactive maps or open data portals, are minimal or nonexistent.

Gap:

The City lacks a modern, enterprise GIS framework that supports cross-departmental collaboration, data-driven decision-making, and efficient service delivery. Key gaps include:

- Absence of a centralized GIS strategy and governance model
- Limited integration between GIS and enterprise systems (e.g., permitting, asset management, public works)
- Inadequate data standards, quality control, and lifecycle management
- Insufficient staffing and training to support GIS needs of city
- Lack of accessible, user-friendly tools for both staff and the public
- Minimal use of GIS for advanced analytics, planning, and operational insights

Desired State:

The City operates a robust, enterprise GIS program that serves as a foundational platform for data visualization, analysis, and decision-making. GIS is fully integrated with key business systems and supports real-time, spatially enabled workflows across departments. Standardized data governance ensures accuracy, consistency, and accessibility of geospatial data. Staff are trained and empowered to use GIS tools effectively, and the public has access to interactive maps and open data resources that enhance transparency and engagement.

Impact if Not Addressed:

Failure to enhance GIS capabilities will limit the City's ability to effectively plan, manage infrastructure, and respond to community needs. Departments will continue to operate in silos, leading to inefficiencies, duplicated efforts, and increased operational costs. Decision-making will rely on incomplete or outdated information, increasing the risk of errors and missed opportunities. This includes manual processes to obtain GIS results which are prone to errors. Additionally, the City may fall behind peer agencies in leveraging data for innovation, grant opportunities, emergency response, and community engagement.



Projects that address the Gap:

#	Project Name	Rationale	Score
1	Enterprise GIS Strategy, Governance Model & Charter	Establishes a formal GIS governance structure including a designated GIS program owner, data stewardship roles, enterprise standards, and a multi-year GIS roadmap aligned to the City's Technology Strategic Plan. Without governance, all downstream GIS investments produce inconsistent, siloed results. This is the prerequisite that determines whether GIS projects succeed or fragment.	10/10 CRITICAL
2	GIS Specialist Staffing & Dedicated Capacity	Engages a dedicated GIS specialist (likely contracted) with proficiency in ArcGIS Enterprise and ArcGIS Online to own data quality, departmental support, and platform administration. Current underutilization of the existing ESRI investment is directly attributable to the absence of dedicated GIS expertise. A specialist multiplies the value of every other GIS investment.	10/10 CRITICAL
3	Enterprise GIS Data Quality Assessment & Standards Implementation	Conducts a full inventory and quality assessment of all existing geospatial datasets across departments. Establishes data standards, metadata requirements, coordinate system standards, and lifecycle management policies aligned to FGDC and ISO 19115 . Data quality is the single most critical factor determining whether GIS analytics produce actionable insights or misleading outputs.	9/10 CRITICAL
4	GIS Integration with Enterprise Systems (ERP, Land Management, Asset Management, Public Works)	Connects ArcGIS Enterprise to the City's ERP, Land Management, and Asset Management systems via API or ETL (Extract, Transform, Load) pipelines, enabling spatially enabled workflows in permitting, infrastructure maintenance, utilities, and fleet management. Integration eliminates duplicate data entry, reduces manual reconciliation errors, and allows staff to see work orders, permits, and assets in their geographic context in real time.	9/10 CRITICAL



#	Project Name	Rationale	Score
5	ArcGIS Enterprise Online Upgrade & Platform Modernization	Migrates from the current underutilized ArcGIS desktop/online environment to a fully configured ArcGIS Enterprise Online deployment with role-based access, departmental apps, and mobile field data collection. The existing ESRI investment is underperforming due to configuration gaps and lack of enterprise deployment. Modernizing the platform enables all other GIS capabilities at no additional licensing cost.	9/10 CRITICAL
6	GIS Field Data Collection & Mobile Workforce Enablement	Deploys ArcGIS Field Maps and Survey123 for mobile field data collection by Public Works, Code Enforcement, Utilities, and Parks staff. Replaces paper forms and manual data re-entry with real-time, GPS-stamped digital records that feed directly into enterprise GIS datasets. Reduces data errors by eliminating the paper-to-digital transcription step and accelerates infrastructure condition reporting cycles.	9/10 CRITICAL
7	Public-Facing GIS Web Portal & Interactive Maps	Launches a public-facing GIS web portal (ArcGIS Hub or similar) providing residents with interactive maps for zoning, permits, public works projects, parks, and community resources. Increases transparency, reduces staff time spent answering routine location-based inquiries, and aligns with California open government mandates. Also enables community participatory mapping for planning and engagement initiatives.	8/10 HIGH
8	GIS-Enabled Emergency Management & Situational Awareness Dashboard	Build a real-time situational awareness dashboard for emergency operations integrating GIS layers for infrastructure, utilities, public safety resources, vulnerable populations, and incident locations. Enables the Emergency Operations Center to make spatially informed response decisions during fires, floods, and other incidents. Directly addresses the gap in emergency response coordination identified in the impact analysis.	9/10 CRITICAL



#	Project Name	Rationale	Score
9	GIS Staff Training Program (Citywide & Departmental)	Delivers a structured, role-based GIS training program covering ArcGIS Online for general staff, ArcGIS Enterprise administration for IT, and specialized spatial analytics training for planning, public works, and utilities. Existing tools are underutilized because staff lack proficiency. Training converts the platform investment into measurable operational value across every department that touches geospatial data.	8/10 HIGH
10	Spatial Analytics & Advanced GIS Capabilities (Predictive & Planning)	Deploys ArcGIS Pro with spatial analytics extensions to enable predictive infrastructure failure modeling, equity analysis for service distribution, traffic and pedestrian pattern analysis, and climate vulnerability mapping. Elevates GIS from a mapping tool to a strategic decision-support platform. Directly addresses the 'minimal use of GIS for advanced analytics' gap and positions the City to leverage GIS for state and federal grant applications requiring spatial data evidence.	8/10 HIGH

BEST PRACTICE –

- ESRI ArcGIS Enterprise and ArcGIS Online - Best practices provide the deployment and governance guidance for the City's existing platform investment.
- OGC (Open Geospatial Consortium) standards - Ensure interoperability between GIS systems and enterprise applications.
- FGDC (Federal Geographic Data Committee) Content Standard for Digital Geospatial Metadata - is the federal metadata standard for all government geospatial datasets.
- ISO 19115 - Defines the international standard for geospatial metadata schemas.
- The NIST Privacy Framework - Governs how location data — which can be sensitive — is overseen in public-sector GIS environments.



PROJECT SUMMARY SCORECARD

Total Projects	Critical (9–10)	High Value (8)	Sections Covered
48	30	18	12

1. Governance & Strategic Alignment

COBIT 2019 | ISO/IEC 38500 | PMBOK

GAP Lack of mature formal IT governance framework to prioritize investments, manage risk, and align projects with organizational objectives.	DESIRED STATE Structured IT governance with executive oversight, project prioritization, and clear decision-making authority including IT Executive Committee and IT Business Committee.
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Project	Score	Standard
IT Executive Committee Charter & Governance Framework	9/10 CRITICAL	COBIT 2019
Annual Technology Strategic Plan (5-Year Rolling Roadmap)	9/10 CRITICAL	COBIT 2019
Technology Portfolio Management Platform	8/10 HIGH	COBIT 2019
IT Policy & Standards Library Development	8/10 HIGH	COBIT 2019

2. Application Modernization

TOGAF | ISO/IEC 25010 |

GAP Limited integration between systems and reliance on legacy applications that reduce efficiency and increase maintenance costs.	DESIRED STATE Modern, integrated applications supporting digital workflows, improved data sharing, reduced manual effort, and AI-readiness.
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Project	Score	Standard
Application Portfolio Assessment & Rationalization (TIME Model)	9/10 CRITICAL	TOGAF
Enterprise Integration Platform / API Gateway	9/10 CRITICAL	TOGAF
ERP / Core Platform Upgrade or Replacement	8/10 HIGH	TOGAF
Document & Records Management System Modernization	8/10 HIGH	TOGAF

3. Data Management & Analytics

DAMA-DMBOK | ISO 8000 | NIST Privacy Framework

GAP Inconsistent data governance, limited reporting beyond manual use, and insufficient ability to leverage data for decision-making.	DESIRED STATE Centralized data strategy with improved reporting, dashboards, and analytics supporting operational and strategic decision-making.
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Project	Score	Standard
Enterprise Data Governance Program	10/10 CRITICAL	DAMA-DMBOK
Cloud Data Warehouse / Data Lake Implementation	9/10 CRITICAL	DAMA-DMBOK
Business Intelligence & Executive Dashboard Platform	9/10 CRITICAL	DAMA-DMBOK
Open Data Portal for Community Transparency	8/10 HIGH	DAMA-DMBOK

4. Infrastructure & Cloud Readiness

NIST SP 800-146 | ISO/IEC 17788 | CSA STAR

**GAP**

Limited scalability, inconsistent architecture standards, and no formal cloud strategy guiding adoption.

DESIRED STATE

Well-defined hybrid or cloud-first strategy improving scalability, resilience, and disaster recovery with GovCloud adoption.

Project	Score	Standard
Hybrid Cloud Strategy & Architecture Blueprint	9/10 CRITICAL	<i>NIST SP 800-146</i>
GovCloud Migration Program (Prioritized Workloads)	8/10 HIGH	<i>NIST SP 800-146</i>
Network Infrastructure Modernization (SD-WAN / SASE)	8/10 HIGH	<i>NIST SP 800-146</i>
Infrastructure as Code (IaC) & Configuration Management	8/10 HIGH	<i>NIST SP 800-146</i>

5. Digital Services & Customer Experience

WCAG 2.1/2.2 | ISO 9241 | U.S. Web Design System

GAP

Limited digital service options and online self-service capabilities for residents and stakeholders.

DESIRED STATE

Expanded digital services, improved online portals, and modern communication tools enhancing engagement and accessibility.

Project	Score	Standard
Unified Citizen Self-Service Portal	9/10 CRITICAL	<i>WCAG 2.1/2.2</i>
Online Permitting, Licensing & Inspection System	9/10 CRITICAL	<i>WCAG 2.1/2.2</i>
CRM / 311 Service Request Management Platform	8/10 HIGH	<i>WCAG 2.1/2.2</i>
Digital Accessibility Audit & Remediation (WCAG 2.1 AA)	8/10 HIGH	<i>WCAG 2.1/2.2</i>

6. Workforce & IT Capacity

SFIA | IEEE 1484 | CompTIA Government

**GAP**

Limited capacity for innovation and strategic initiatives; specific gaps in cybersecurity, cloud, data engineering, and GIS skills.

DESIRED STATE

IT workforce with resources, skills, and tools to support modernization, cybersecurity, and strategic initiatives.

Project	Score	Standard
IT Skills Assessment & Workforce Development Roadmap	8/10 HIGH	SFIA
IT Career Ladder, Succession Planning & Retention Program	8/10 HIGH	SFIA
GIS Platform Modernization & Specialist Capacity	8/10 HIGH	SFIA
Managed Service Provider (MSP) / vCISO Partnership	8/10 HIGH	SFIA

7. Automation & Emerging Technologies

IEEE 7000 (Ethical AI) | ISO/IEC 42001 |

GAP

Limited use of automation, AI, and workflow tools; many processes remain manual with redundant data entry.

DESIRED STATE

Increased use of automation, workflow platforms, and AI-enabled tools to streamline operations and improve service delivery.

Project	Score	Standard
AI Readiness Assessment & Responsible AI Governance Framework	9/10 CRITICAL	IEEE 7000 (Ethical AI)
Robotic Process Automation (RPA) Center of Excellence	8/10 HIGH	IEEE 7000 (Ethical AI)
Low-Code / No-Code Workflow Automation Platform	8/10 HIGH	IEEE 7000 (Ethical AI)
AI Chatbot / Virtual Assistant & Predictive Maintenance	8/10 HIGH	IEEE 7000 (Ethical AI)



8. IT Investment — Replacement Fund & Budget

ISO 55000 (Asset Mgmt) | ITIL 4 | GFOA Best Practices

GAP

No dedicated technology replacement fund, reactive budgeting, and insufficient base budget for strategic initiatives.

DESIRED STATE

Sustainable funding framework including a Technology Replacement Fund, multi-year lifecycle schedules, and CIP integration.

Project	Score	Standard
Technology Replacement Fund (Internal Service Fund) Establishment	10/10 CRITICAL	ISO 55000 (Asset Mgmt)
IT Asset Management System & Lifecycle Inventory	9/10 CRITICAL	ISO 55000 (Asset Mgmt)
Multi-Year IT Capital Improvement Plan (CIP Integration)	9/10 CRITICAL	ISO 55000 (Asset Mgmt)
IT Total Cost of Ownership (TCO) Model & Chargeback Framework	8/10 HIGH	ISO 55000 (Asset Mgmt)

9. Local Government Project Management

PMI PMBOK 7th Ed. | PRINCE2 | ISO 21502

GAP

Decentralized, inconsistent project management practices; no PMO, no standardized methodology, and no enterprise portfolio visibility.

DESIRED STATE

Standardized enterprise-wide project management framework with a PMO, formal methodology, portfolio dashboards, and cross-department resource management.

Project	Score	Standard
Project Management Office (PMO) Establishment & Charter	10/10 CRITICAL	PMI PMBOK 7th Ed.
Enterprise PM Methodology (PMI PMBOK Adoption)	10/10 CRITICAL	PMI PMBOK 7th Ed.
Project Portfolio Management (PPM) Platform	9/10 CRITICAL	PMI PMBOK 7th Ed.
Project Prioritization Framework & Annual Portfolio Review	9/10 CRITICAL	PMI PMBOK 7th Ed.



10. GIS Capability

ESRI ArcGIS Best Practices | OGC Standards | FGDC | ISO 19115

GAP

Limited, decentralized GIS usage restricted to basic mapping; no enterprise GIS strategy, governance, or integration with business systems.

DESIRED STATE

Robust enterprise GIS program as a foundational platform for data visualization, analysis, and spatially enabled workflows across all departments.

Project	Score	Standard
Enterprise GIS Strategy, Governance Model & Charter	10/10 CRITICAL	ESRI ArcGIS Best Practices
GIS Specialist Staffing & Dedicated Capacity	10/10 CRITICAL	ESRI ArcGIS Best Practices
Enterprise GIS Data Quality Assessment & Standards	9/10 CRITICAL	ESRI ArcGIS Best Practices
GIS Integration with Enterprise Systems (ERP/LMS/EAM/PW)	9/10 CRITICAL	ESRI ArcGIS Best Practices

Confidence scores reflect expected operational benefit, strategic alignment, and transformation impact. Projects scored 9–10 represent foundational investments that enable all subsequent modernization.



Recommendations

The data collected for this report supports a set of **clear, actionable recommendations** that will help the City of East Palo Alto strengthen, modernize, and stabilize its future IT service delivery. These recommendations reflect patterns observed across interviews, infrastructure reviews, operational assessments, and comparative benchmarks with similar sized municipalities. Together, they outline a path toward a more resilient, secure, and service oriented- technology environment.

The City may have an opportunity to build a new Civic Center — including a library, city hall, police station and park with track and field — if the voters approve a ballot measure allotting the funding. The recommendations below take this into account. Projects that can benefit from a new City Hall i.e., consolidate keycard systems, have been identified as future projects. They should be reevaluated if/when the City builds a new City Hall and corresponding facilities that would support innovation for the community.

The most relevant conclusions and recommendations, **in order of importance**, are:

1) **Come to a decision point to improve or replace the existing the City's ERP system (Caselle).**

Recommendation: Establish a clear decision regarding whether to improve or replace the City's use of the Caselle ERP system. Staff interviews revealed a consistently elevated level of dissatisfaction with the system's functionality, usability, and alignment with departmental needs and citywide needs. To validate these concerns and chart an informed path forward, the City should engage an external subject matter expert (e.g., Government Financial Officers Association (GFOA)) to conduct a comprehensive review of the current Caselle configuration, business processes, and system utilization. This independent assessment will help determine whether Caselle can be remediated through configuration changes, training, and module expansion, or whether the City should begin planning for a transition to a more suitable ERP solution. If the decision is made to replace Caselle, the business process review can be utilized by a qualified consultant to assist in RFP creation, response evaluation, and vendor selection.

2) **Replace the existing planning/land use workflow software (Trakit).**

Recommendation: Replacement of the City's Trakit system should focus on implementing a platform with current standards, strengthening user proficiency, and ensuring the system is configured to support actual business needs moving forward. The current system is several versions behind, and this lag has limited the organization's ability to take advantage of key features and improvements that a more modern system offers. In several departments, staff have postponed adopting certain business processes while waiting for updates that could address missing or incomplete capabilities. This has contributed to the inconsistent use of Trakit and reduced the system's overall value to operations. A more intentional approach is needed to realign departmental workflows and service delivery expectations. It should be noted, Trakit is built on dated technology and is a risk due to limited support. Updates alone would not provide the capabilities of modern planning/land use systems or correct the limitation of limited support staff.

A comprehensive business process review (BPR) is strongly recommended to guide replacing Trakit. Such a review would document how departments currently use Trakit, identify gaps between system capabilities and operational needs, and highlight opportunities to streamline workflows. This BPR would also help verify that the system should be replaced. The BPR can be utilized by a qualified consultant to assist in



RFP creation, response evaluation, and vendor selection. The outcome should be a clear roadmap for improving system utilization across departments and divisions, ensuring that a Trakit successor is positioned to support efficient, transparent, and accountable service delivery in addition to integrating with the City's ERP system.

3) **Implement a Customer Relationship Management Portal (CRM/311) to facilitate residents.**

Recommendation: Implement a secure, user-friendly Customer Portal (CRM/311) that functions as the City's unified digital front door, giving residents a single, intuitive place to access services, information, and transactions. The portal should streamline routine interactions, increase transparency into City processes, and expand opportunities for self-service while upholding strong standards for accessibility, equity, and data protection.

- Evaluate commercial off-the-shelf (COTS) resident portal platforms, existing ERP/CRM modules that can integrate with current systems.
- Prioritize solutions with mobile app capabilities, robust integration capabilities, security certifications, and proven municipal deployments.
- Connect to permitting, work order, billing, document management, and other systems to avoid duplicating data entry.
- Ensure consistent master data (addresses, parcels, customer records) across systems.
- Assign a business owner (e.g., City Manager's Office or a central service department) and a technical owner (IT) for ongoing management.
- Establish standards for content, service definitions, Service Level Agreements (SLA), and change management.
- Train staff on how to process portal-originated requests and communicate with residents through the platform.
- Develop internal standard operating procedures (SOP) to ensure timely responses and consistent service quality.
- Maintain alternative access channels (phone, in-person, mail) for residents who cannot or prefer not to use digital services.
- Partner with libraries, community centers, and local organizations to support residents in using the portal where appropriate.

4) **Update the City Website and create an Intranet to assist City Staff.**

Recommendation: The website and Intranet will serve as a "Unified Digital Front Door" for the City. This project updates the City Website and includes a secure, intuitive, and fully integrated intranet that strengthens internal communication, streamlines access to resources, and supports staff productivity across all City departments. Redesigning the city website is a high priority, as well as replacing the website content management system used by staff for updating content which was viewed as outdated and difficult to use. Both the website and the intranet could be provided by one single system/vendor or a separate system/vendor.

Updating the city website will provide residents and businesses with easier access to services, better communication & transparency, increased equity & accessibility, service request integration resulting in faster problem reporting & response, stronger civic engagement, cost & time savings



for residents and the city, and a more positive public perception of the city in general. Improvements to the back-end system for updating information by city staff will increase efficiency and keep website content current.

The intranet should reduce reliance on email, eliminate information silos, and serve as the single authoritative source for City policies, forms, procedures, and organizational updates. By consolidating information and tools into a trusted environment, the City can improve operational consistency, enhance transparency, and ensure staff have what they need to perform their work efficiently.

A well-designed intranet becomes the City's internal "home base" — a centralized, reliable, and easy-to-navigate platform where employees can quickly find information, collaborate with colleagues, and complete routine tasks without searching across multiple systems. It provides a cohesive digital workspace that supports day-to-day operations, reinforces organizational standards, and enables departments to share knowledge in a structured, sustainable way.

- Centralize information: Provide one location for policies, procedures, forms, templates, HR resources, IT help, and department pages.
- Improve communication: Offer news, announcements, alerts, and leadership messages in a structured, searchable format.
- Support collaboration: Enable teams to share documents, calendars, and project updates using integrated tools.
- Enhance efficiency: Reduce time spent searching for information or requesting routine documents.
- Strengthen organizational culture: Promote transparency, recognition, and cross-departmental awareness.

5) **Provide Citywide GIS data management improvements serving all Departments.**

Recommendation: GIS has historically been implemented in a fragmented, department-by-department manner, resulting in a collection of tools and datasets that do not function as a cohesive, Citywide system. This siloed approach has limited the City's ability to fully leverage geospatial information for strategic planning, operational coordination, and data-driven decision-making.

Today, GIS plays a critical role in helping the City aggregate, visualize, and analyze the extensive data required to address complex issues across all departments. Because GIS spans nearly every discipline, it provides a shared framework for communication and supports collaborative decision making- among City staff, partner agencies, and the community. GIS is also a foundational piece for becoming a Connected Community/Smart City.

During GTG's interviews with City staff, nearly every department identified GIS as an essential tool for their operations and expressed a desire for expanded capabilities. This widespread reliance underscores the need for expertise and sustained funding to strengthen the City's GIS program and ensure it can meet current and future organizational demands.

6) **Enhance the current document management system.**



Recommendation: The City’s current document management practices fall short of supporting the day-to-day and strategic needs of its departments, largely because existing tools—such as Laserfiche, SharePoint, and other platforms—are not being used in a coordinated or optimized way. A more intentional, enterprise-wide approach would allow the organization to modernize how information is created, stored, shared, and preserved.

Departments rely on a mix of legacy file shares, individual storage habits, and partially configured systems. This fragmentation leads to inconsistent document handling, duplicated files, unclear version control, and difficulty locating authoritative records. It also increases the burden on staff who must navigate multiple systems without a unified structure or governance model.

A comprehensive document management strategy—supported by clear standards, governance, and modern tools—would create measurable improvements across the organization:

- Reduced storage requirements through consolidation, deduplication, and lifecycle management aligned with the City’s retention schedule.
- Stronger security by applying consistent access controls, audit trails, and permissions across all departments.
- Improved regulatory compliance, particularly for records retention, public records, and departmental documentation obligations.
- Faster and more accurate retrieval, supported by metadata standards, search optimization, and centralized repositories.
- Enhanced collaboration through shared workspaces, version control, and real-time co-authoring.
- More efficient responses to Public Records Act (PRA) requests, with better indexing, clearer ownership of records, and reduced manual searching.
- More reliable backup and disaster recovery, enabled by cloud-based redundancy and standardized storage practices.

Beyond the technical gains, a modernized document management environment would deliver important organizational value. Staff would spend less time searching for information and more time on service delivery. Departments would operate with greater consistency and transparency. The public would experience faster, more accurate responses, and improved access to information. These “intangible” benefits—efficiency, clarity, accountability, and trust—are often the most meaningful outcomes of a well-designed document management program.

7) Institute better file management and document sharing (OneDrive/SharePoint/LaserFiche).

Recommendation: Expanding adoption of Microsoft Office 365—particularly OneDrive and SharePoint—positions the City to modernize collaboration, strengthen information governance, and improve responsiveness to both internal and external demands. A more intentional, enterprise-wide rollout will help standardize how departments create, store, share, and retrieve information, reducing fragmentation and improving overall operational efficiency.

A broader, more structured deployment of Office 365 enables departments to work from a common



platform with consistent practices. SharePoint team sites, standardized document libraries, and OneDrive for individual workspaces create a unified environment where staff can collaborate in real time, maintain version control, and reduce reliance on email attachments. This shift supports a more agile, mobile-ready workforce and aligns with modern expectations for digital delivery.

Expanding SharePoint and OneDrive usage directly supports more efficient PRA responses by centralizing documents, improving searchability, and reducing the time spent locating records across disparate systems. Metadata, retention labels, and structured libraries help ensure that documents are stored in predictable locations with clear ownership and lifecycle management. This reduces risk, enhances transparency, and supports compliance with state records laws.

A well-designed Office 365 environment strengthens the City's information governance posture. Features such as role-based access controls, audit trails, automated retention policies, and secure external sharing help protect sensitive information while enabling appropriate collaboration. Integrated workflow tools—such as Power Automate—can streamline routine processes, reduce manual steps, and improve consistency across departments.

To ensure the expansion is effective and sustainable, the City should engage a SharePoint subject-matter expert to lead the design and configuration of departmental and enterprise sites. This expertise is essential for:

- Developing a scalable information architecture that reflects how the City works
- Creating standardized templates for department sites, document libraries, and workflows
- Establishing governance practices that balance flexibility with control
- Training staff and building internal champions to support long-term adoption
- Ensuring integrations with existing systems are secure, efficient, and future-ready

This structured approach accelerates adoption, reduces rework, and ensures the City realizes the full value of its Office 365 investment.

8) **Training for both IT staff and end users has become a major pain point.**

Recommendation: Training for both IT staff and end users stands out as one of the most pervasive and urgent needs identified across all GTG interviews with City personnel. Currently, the City does not have uniform requirements for ability to use certain software, nor does it provide uniform training on its software. Staff consistently expressed that their ability to fully utilize the City's systems and applications is limited by uneven skill levels, inconsistent training opportunities, and the absence of a structured, ongoing learning program. Strengthening organizational proficiency will require a more intentional approach to developing both technical and operational competencies.

A more robust training model would help the City close longstanding knowledge gaps, reduce reliance on informal peer support, and improve the overall return on investment in enterprise systems. This includes elevating IT staff capabilities—particularly in areas such as system administration, cybersecurity, and application support—while also ensuring end users receive practical, -role specific- instruction that enables them to work more efficiently and confidently.



Several pathways could address this need:

- **Establish a dedicated in-house HR/IT training position** to design curriculum, deliver regular training sessions, maintain documentation, and coordinate with departments on emerging needs, or:
- **Leveraging external training providers** to deliver specialized or advanced instruction, particularly for complex systems such as ERP, Land Management, GIS, and cybersecurity platforms.
- **Developing a structured, ongoing training program** that includes onboarding, refresher courses, system specific modules, and just-in-time learning resources.
- **Ensuring IT Staff are provided ongoing training** in technologies used by the City including cyber security, Microsoft systems, networking and innovation to make a few.

Taken together, these steps would create a sustainable training framework that supports continuous improvement, strengthens system adoption, and enhances the City's overall operational effectiveness

9) **Improving contract management within the organization with technology.**

Recommendation: Adopt an industry-standard procurement and contract management system that manages the full lifecycle of contract activity—from initial creation and collaboration through negotiation, execution, tracking, and renewal. Such a platform provides consistent, transparent, and compliant handling of every document and workflow step, ensuring alignment with organizational policies and reducing reliance on ad-hoc practices. While DocuSign will strengthen the digital signature component, it represents only one element of a much broader process. An end-to-end contract management framework should be developed to define workflows, roles, responsibilities, and approval paths. Establishing this structure will reduce confusion, eliminate common pain points, and significantly improve efficiency, accountability, and regulatory compliance across the organization.

10) **Create Comprehensive Technology Policies covering key operational, security, and governance.**

Recommendation: Information Technology policies are foundational to the effective, secure, and accountable operation of a modern municipal government. As cities expand their reliance on digital systems to deliver services, manage sensitive data, support internal operations, and engage residents, the need for clear and comprehensive IT policies becomes increasingly critical. These policies establish the governance framework that guides how technology is selected, implemented, secured, and maintained across the organization.

Well-defined IT policies promote consistency in decision making, reduce operational and cybersecurity risks, and ensure compliance with legal, regulatory, and industry standards. They also help align technology investments with organizational priorities, improve transparency, and reinforce public trust by demonstrating



responsible stewardship of taxpayer-funded systems and data. By adopting and enforcing a cohesive set of IT policies, the City can create a stable foundation for innovation, operational efficiency, and long-term-digital resilience.

As part of this IT Strategic Plan project, the City will be provided with policies that have won the Municipal Information Systems of California 10 plus years in a row. GTG recommends amending these to meet the City's needs and implementing them in the City with the IT Executive committee, in addition to evaluating other policies the City may need, i.e., an Artificial Intelligence policy or policies.

11) Improving staffing levels within IT based on industry standards.

Recommendation: Enhance IT staffing levels to meet the growing demand for services and support across the organization. Conduct a focused internal assessment, through IT Governance, of current staffing capacity to identify gaps that limit IT's ability to deliver timely and effective services. Given the natural fluctuations in organizational priorities and workload, this assessment should be repeated annually and include consideration of supplemental external resources when appropriate.

Feedback from multiple departments indicates strong appreciation for the quality of work delivered by the IT team; however, they consistently noted that current staffing levels are insufficient to keep pace with expanding operational needs. To sustain service quality, support organizational growth, and ensure responsiveness to stakeholders, increasing IT staffing and associated resources is essential.

EPA's current staffing level places its IT-to-employee ratio well outside published norms and expanding the explanation helps underscore both the quantitative gap and the strategic implications for the organization.

Workforce.com's 2023 (<https://workforce.com/news/ratio-of-it-staff-to-employees>), benchmarking shows that small organizations average an IT staffing ratio of roughly 1:27, with the highest published ratio in that category at 1:34 . Against that backdrop, EPA's current ratio of 1:63—two IT staff supporting 126 FTE—reflects a level of understaffing that is nearly double the upper boundary of industry norms. This gap is consistent with stakeholder feedback indicating that IT performs well but lacks the capacity to meet growing organizational needs.

A ratio this high typically signals:

- Insufficient capacity for proactive work, including modernization, cybersecurity hardening, and process improvement.
- Increased operational risk, as a small team must support a broad application portfolio, infrastructure, and end-user needs without redundancy.
- Reduced resilience where staff absences, turnover, or surges in demand can quickly degrade service levels.
- Limited specialization, forcing generalists to stretch across domains that normally require dedicated expertise.

Adding two additional IT positions would bring EPA to four total IT staff, improving the ratio to 1:32—



squarely within the published best-practice range for small organizations. This shift does more than simply align EPA with benchmarks; it materially changes the division's ability to operate strategically rather than reactively.

EPA's needs, as reflected in interviews and operational realities, extend beyond general IT support. Structuring the added positions to include fractional specialization would directly address gaps that are increasingly critical for municipal operations:

- Fractional GIS specialists support the citywide demand for mapping, spatial analysis, and data-driven decision-making, especially as nearly every department relies on GIS.
- Fractional security specialists strengthen cybersecurity posture, supports compliance, and reduce risk exposure in an environment where small IT teams are disproportionately vulnerable.

This blended approach allows EPA to gain targeted expertise without the cost of multiple full-time specialist positions, while still improving baseline capacity for day-to-day support and long-term planning.

12) Improve funding of IT and their systems based on industry standards.

Recommendation: Enhance and stabilize funding for IT resources across the organization by increasing general fund support or establishing an Internal Service Fund (ISF) to more accurately distribute and recover technology costs. An ISF—commonly used in governmental accounting—allows the City to track IT goods and services provided to departments on a cost reimbursement basis. Implementing this model improves transparency, aligns costs with actual consumption, and provides a sustainable mechanism for funding the City's information technology needs.

The total IT operating budget for FY 2025/26 is \$1,891,374, which is 3.0% of the total city operating budget of \$61,265,685. According to Deloitte's *2023 Global Technology Leadership Study*, the average tech budget as a percentage of revenue is 5.49%, up from 4.25% in 2020.

<https://www.deloitte.com/us/en/programs/chief-executive-officer/articles/global-technology-leadership-survey.html>

While public sector organizations often spend less than the average, this lower range reflects historical underinvestment, not reduced need. In addition to staff productivity, IT now directly supports core service delivery, data security and privacy compliance, continuity of operations, public access, and transparency, as well as cost control.

Based on financial data from the California State Controller's Office, guidance from the League of California Cities, and peer benchmarking from MISAC, cities in California with populations between 10,000 and 50,000 typically allocate approximately 3%–5% of total operating budgets to information technology.

Underfunding IT does not reduce costs — it shifts costs into system failures, emergency repairs, cybersecurity incidents, manual workarounds, and staff inefficiency. Maintaining outdated systems or limited staffing raises financial, legal, and reputational risks well beyond the cost of proactive investment. Most relevantly, service delivery to residents suffers greatly when IT is underfunded.

Cybersecurity alone requires increased investment. Cyber threats are increasing in frequency, cost, and



sophistication, particularly for public-sector and nonprofit organizations. Industry guidance increasingly treats cybersecurity as essential infrastructure, not discretionary spending.

13) **Providing more efficient, economical, and updated hardware systems.**

Recommendation: Establish a dedicated IT Asset Replacement Fund to ensure timely, consistent, and strategic replacement of all hardware systems. This fund would provide a stable mechanism for maintaining technologically viable equipment and aligning infrastructure with evolving organizational needs. It should operate independently from the IT Division's internal service operational costs and be structured as a capital fund that receives annual updates and appropriations as part of the City's broader budget process. Creating this fund strengthens long-term planning, reduces unexpected fiscal impacts, and supports a modern, reliable technology environment.

14) **Develop Policies for evaluating the use of Cloud services.**

Recommendation: The City should develop formal policies, standards, and evaluation criteria to guide all software procurement decisions, including consideration of Software as-a-Service (SaaS) solution. A well-defined cloud policy must incorporate a full Total Cost of Ownership (TCO) analysis—covering software licensing, required hardware or infrastructure, ongoing maintenance, service level agreements, and the level of onsite IT support needed. This approach ensures that cost reduction opportunities are fully understood and aligned with the City's long term financial and operational goals.

The policy should also clearly articulate expectations regarding the operational tradeoffs associated with cloud adoption. Once an application is migrated to the cloud, the City relinquishes direct control over resolving hardware and software issues and becomes reliant on the cloud provider's technical capabilities, service levels, and responsiveness. Understanding this shift in responsibility is essential for risk management and service continuity planning.

Additionally, the City's internet connectivity and redundancy become mission critical components of cloud readiness. Each application under consideration for cloud deployment should undergo an assessment of its bandwidth requirements and potential impact on network performance to ensure reliable access for staff and the public.

Potential Benefits of Cloud Computing:

- **Scalability:** Ability to rapidly scale computing resources up or down based on demand.
 - **Cost Optimization:** Opportunity to shift from capital expenditure to predictable operational expenditure.



- **Device and Location Flexibility:** Access to applications through a web browser from any location or device, including desktops, laptops, tablets, and smartphones.
- **Reduced IT Maintenance Burden:** Routine maintenance, updates, and patches are managed by the cloud vendor, freeing internal IT resources for higher value- work.
- **Multitenancy- Efficiencies:** Shared infrastructure across multiple customers can reduce overall costs.
- **Enhanced Business Continuity:** Cloud providers typically offer geographically redundant data centers, improving disaster recovery capabilities and reducing operational risk to the City.

15) **Keep all City's systems compliant with all necessary upgrades and updates.**

Recommendation: Establish a structured, organization wide update and upgrade schedule for all mission critical systems through the IT governance process. A disciplined approach to system lifecycle management ensures that departments are consistently operating- with current, secure, and fully supported technology.

Planned upgrades must be paired with proactive communication and targeted user training, so staff understand new features, workflow changes, and performance improvements introduced with each release. This combination of technical updates and user readiness maximizes the value of system enhancements.

A predictable and professionally managed upgrade program enables the organization to benefit from vendor improvements, reduce unplanned downtime, and lower long- term maintenance costs. Each proposed upgrade should be supported by a risk evaluation that identifies -operational vulnerabilities, assesses potential business impacts, and provides a clear justification for prioritizing the update.

16) **Utilize outside subject matter experts to address user needs.**

Recommendation: When a technology initiative exceeds the internal skillset of the IT division, the organization should engage external subject matter experts to ensure successful implementation. A structured assessment—such as a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis—should be used to determine whether outside expertise is warranted. This evaluation provides an objective framework for identifying capability gaps, assessing project complexity, and confirming that external support is the most effective path forward.

Whenever external resources are utilized, it is essential that a formal knowledge transfer process be completed at the conclusion of the engagement. This ensures that IT staff gain the necessary skills to support, maintain, and enhance the system long term, reducing future dependency on outside



assistance- and strengthening organizational capacity.

17) Implementation of AI

Recommendation: EPA has many foundational issues that need to be addressed including:

- Workflows are the foundation for several reasons, they identify ownership of tasks and hand offs through any process which improves efficiency. They also lay the groundwork for any initiative where the city plans to introduce modern technology or augmented processes
- Data needs to be treated as a valuable asset. Provenance, governance, and subsequent use will rely on the foundational measures and processes put in place. This includes quality of the data, where the data is housed and for how long. Access to the data and auditability of use.
- Land use, asset management, GIS, and integration. The City should work on these key issues while planning the roadmap to using AI to improve services where it makes sense for the organization as a whole.

AI has the promise of transforming government operations by automating tasks, accelerating document production, and improving constituent services. But before it is put into Proof of Concept (POC), Pilot, or anything other than road mapped, the foundation to support it needs to be validated. AI is a technology tool that is only as good as the foundation it is deployed on or in.

Key Areas of Impact

- Agencies are deploying Generative AI (GenAI) to draft reports, summarize meetings, analyze large datasets, and generate code. These tools reduce administrative burden, accelerate project timelines, and allow staff to focus on higher-value work.
- AI-powered virtual assistants—such as the multilingual, 24/7 chatbot are improving access to information, reducing call volumes, and providing more consistent and personalized support.
- Advanced AI tools can process and interpret large volumes of unstructured data, including public comments, historical budget data, and regulatory filings. These capabilities help agencies identify trends, evaluate policy impacts, and support more informed decision-making.

AI is increasingly used to strengthen cybersecurity through anomaly detection, automated threat analysis, and continuous monitoring. At the same time, agencies are adopting structured governance frameworks to ensure responsible use, protect privacy, and maintain human oversight. These frameworks emphasize transparency, auditability, and alignment with local, state, and federal compliance requirements.

Challenges and Implementation Considerations

Despite its promise, integrating AI into government operations presents several points of consideration:

- **Bias and Equity Risks** — AI models may replicate or amplify existing inequities if not properly trained and monitored.



- Data Privacy and Security — Sensitive information requires strict controls, encryption, and access governance.
- Governance and Accountability — Agencies must establish clear policies for model selection, validation, monitoring, and human review.
- Workforce Readiness — Staff need training to understand AI outputs, manage risks, and integrate tools into daily workflows.

Most agencies are adopting human-in-the-loop approaches, ensuring AI augments—not replaces—professional judgment, particularly in areas involving public safety, regulatory decisions, or financial impacts. Following NIST (RMF) NIST Risk Management Framework will serve as the most up to date best practice

Evolution of AI Capabilities

Artificial Intelligence, Generative AI, and Agentic AI represent a progression in capability and autonomy:

- ❖ Artificial Intelligence (AI) — Systems that perform tasks requiring human-like reasoning, such as classification, prediction, and pattern recognition.
- ❖ Generative AI (GenAI) — Models that create added content (text, images, code) based on learned patterns, enabling rapid drafting, summarization, and ideation.
- ❖ Agentic AI — Is used in local government to improve services by autonomously managing tasks such as processing permitting, managing customer inquiries (311), and improving workflow. Agentic AI enhances efficiency and responsiveness, allowing governments to better meet the needs of the community.

Together, these technologies offer EPA a pathway to modernize operations, improve service delivery, and strengthen data-driven governance, provided they are implemented with robust safeguards and clear accountability structures.

18) Evaluate the expansion of broadband to support Smart City Technology and the Internet of Things (IoT).

The internet of things (IoT) has given rise to the smart home and smart office, with automated, internet-controlled devices like water, sewer and street sensors, thermostats, security systems, and other connected infrastructure. Now, urban areas around the world are investing in IoT to create Smart Cities/Connected Communities, which are designed to improve livability, workability, and sustainability through data and technology.

As technology plays an increasingly influential role in the way we live, work and play, cities have seen benefits of putting it to use in improving sustainability and the services they provide to the community. A Smart City uses modern, connected technology and data sharing to bring together



government, private sector, and non-profits to drive positive resident / social impact in continuously innovative ways.

From City Employees to Next-Generation Workers

While many agencies focus on transportation, public safety, and utility needs, it may come as some surprise that by far the biggest source of Digital Value is in equipping city workers. “A lot more work has to be done than is being done...the same number of workers will now be able to achieve a lot more.” — Dr. Sumit D. Chowdhury Gaia Smart Cities. Investment in next-generation workers will be a smart investment for local government and its residents.

Resident Experience: Making Cities Livable, Clean, and Fun

Resident experience means delivering benefits for both residents and visitors. Those benefits come from improving the city’s ability to monitor what is happening and adjust accordingly. For example, sensors can monitor air quality, noise, and allergens. Remote street kiosks share those and other real-time insights on traffic, transportation, restaurants, and events.

Facilitate more economic development

As experienced by cities across the US, consolidating City initiatives under a single ‘Smart City’ brand, offers an attractive and compelling value proposition for attracting investment from public and private partners.

Recommendation: Create a dig-once policy and develop standards to organically grow broadband infrastructure in the community. Consider the development of a Broadband Master Plan that will identify key issues for broadband in the community including:

- 1) finding out where your community stands;
- 2) define goals;
- 3) have a plan to get the broadband you need to support the community.

This does not mean for the City becomes an Internet Service Provider but to seek methods to improve City services connecting city facilities and parks while evaluating the need to improve broadband infrastructure for the community via a Public Private Partnership (PPP).

Communities heading into 2026/2027 without broadband capabilities must evaluate how they will keep pace.

Government agencies that invest in broadband and smart city technologies will benefit their staff, residents, and businesses. Investing broadband infrastructure will not only improve services but could result in long term revenue enhancements for a City.



Network and Security Plan Recommendations

A companion report (provided separately) entitled **Network and Security Plan Recommendations** presents a confidential assessment of the City's current information security and network environment, along with a **Security Projects List** containing prioritized recommendations to strengthen resilience, reliability, and overall risk posture. As municipal operations become increasingly dependent on digital systems, the need for a secure, well-architected, and proactively managed technology infrastructure is critical to maintaining service continuity, protecting sensitive data, and preserving public trust.



Recommendation Summary - Gap Analysis

The foregoing list of recommendations are summarized in the following matrix.

Strategic Area	Current State	Desired Future State	Gap Identified	Recommended Actions
ERP System (Caselle)	Current ERP system is widely viewed as difficult to use and misaligned with organizational needs.	ERP system is fully aligned with organizational workflows and modern fiscal management practices.	Misalignment between system capabilities and operational needs; staff dissatisfaction.	Conduct external review of Caselle; determine whether to reconfigure or replace; perform business process review to support potential ERP replacement. Develop roadmap for improvement and/or RFP if replacement is required.
Planning/land use workflow software (Trakit)	System is several versions behind and lacks required functionality; inconsistent use across departments.	Modern planning/land use workflow software aligned with current workflows and regulatory needs.	Outdated platform limiting functionality and staff adoption.	Conduct Business Process Review; evaluate replacement system; develop roadmap and RFP if replacement is required.
Customer Portal / CRM / 311	No centralized digital interface for residents to access services.	Unified customer portal providing streamlined digital access to city services.	Lack of centralized service access and transparency.	Implement CRM/311 customer portal; integrate with permitting, billing, and service systems; assign ownership and establish SOPs.
City Website & Staff Intranet	Website backend content management system outdated; internal information scattered across systems.	Unified Digital Front Door provided by modern public website and centralized staff intranet.	Inefficient internal communication and outdated public-facing systems.	Upgrade/replace backend content management system, redesign website; implement integrated intranet; centralize staff resources and communication.
GIS Data Management	GIS tools fragmented across departments.	Unified citywide GIS program supporting cross-department collaboration and planning.	Lack of coordinated geospatial data governance.	Develop citywide GIS strategy; invest in expertise and infrastructure; support cross-departmental GIS integration.



Strategic Area	Current State	Desired Future State	Gap Identified	Recommended Actions
Document Management	Multiple systems used inconsistently (Laserfiche, SharePoint, file shares).	Enterprise document management strategy with standardized storage and governance.	Fragmented document practices causing inefficiency and duplication.	Implement centralized document management strategy; define metadata, governance, retention standards.
File Sharing & Collaboration (Office 365)	Limited or inconsistent adoption of OneDrive and SharePoint.	Unified collaboration platform across departments.	Inconsistent information governance and collaboration tools.	Expand Office 365 adoption; develop SharePoint architecture; train staff; implement standardized templates and workflows.
IT Training	Training opportunities inconsistent; staff skills uneven.	Continuous training program for IT staff and end users.	Skill gaps and reliance on informal support.	Establish formal training program; consider dedicated IT trainer or external providers.
Contract Management	Contract processes fragmented and inefficient.	End-to-end contract lifecycle management system.	Lack of standardized procurement and contract workflows.	Implement contract management system integrated with digital signatures and approval workflows.
IT Governance Policies	Limited or outdated IT policy framework.	Comprehensive technology governance and security policies.	Inconsistent standards for technology usage, security, and governance.	Develop and implement IT policies including AI governance and cybersecurity standards.
IT Staffing	IT staffing ratio is 1:63 employees per IT staff.	Staffing aligned with industry norms (~1:32).	Significant understaffing limiting strategic work.	Add at least two IT positions; incorporate GIS and cybersecurity specialization.
IT Funding	IT budget ~3.0% of total city operating budget.	Sustainable funding aligned with municipal IT funding benchmarks outlined in the following table.	Chronic underinvestment in technology infrastructure.	Increase IT funding; consider Internal Service Fund model for cost transparency.
Hardware Lifecycle	Hardware replacement not consistently planned.	Strategic lifecycle management for IT assets.	Aging equipment and reactive replacement.	Establish IT Asset Replacement Fund for planned hardware refresh cycles.



Strategic Area	Current State	Desired Future State	Gap Identified	Recommended Actions
Cloud Adoption Policy	No formal cloud evaluation framework.	Structured cloud policy with risk and cost evaluation.	Lack of governance for SaaS procurement and deployment.	Develop cloud policy with total cost of ownership analysis and service standards.
System Upgrades	Updates and Upgrades not consistently scheduled.	Organization-wide lifecycle management process.	Risk of outdated or unsupported systems.	Establish structured upgrade schedule with risk assessment and training.
External Technology Expertise	Limited internal capacity for specialized projects.	Strategic use of external subject matter experts.	Skill gaps in advanced implementations.	Conduct SWOT analysis to determine when to use external consultants; require knowledge transfer.
Artificial Intelligence	AI not yet implemented; foundational issues remain.	Responsible AI roadmap supported by strong data governance.	Lack of workflow clarity, data governance, and readiness.	Strengthen workflows and data governance; develop AI roadmap and governance framework.
Broadband & Smart City Infrastructure	Broadband and IoT strategy limited.	Connected community infrastructure supporting smart city technologies.	Lack of strategic broadband planning.	Develop broadband master plan and “dig once” policy; explore public-private partnerships.



Information Technology Funding Benchmarks

Information technology funding benchmarks and best practices are outlined in the table below, which highlights the maturity level of an organization's IT capabilities that are typical at each funding level.

The City's current IT environment largely aligns with the lower maturity level, indicating the need to increase investment, strengthen cybersecurity, and transition toward a more strategic, service-oriented IT model.

Municipal Information Technology Budget Benchmark Comparison (for City Population ~30,000)

Category	Low Maturity / Underfunded	Moderate / Typical	High Maturity / Strategic
IT Budget (\$)	\$1M – \$2.25M	\$2.25M – \$4.5M	\$4.5M – \$9M
IT Spend per Capita	\$30 – \$75	\$75 – \$150	\$150 – \$300+ ^{1 2}
IT Staffing (FTE)	2 – 4	4 – 8	8 – 15 ³
Staffing Model	Mostly reactive, generalists	Mix of generalists + some specialization	Specialized roles (security, cloud, data) ^{3 8}
Cybersecurity Investment	Minimal / ad hoc	5–10% of IT budget	10–20% with formal program ^{5 4}
Infrastructure	Aging, on-prem heavy	Hybrid (on-prem + cloud)	Cloud-first, modernized systems ²
Systems Integration	Siloed departments	Partial integration	Enterprise-wide integration ⁴
Service Delivery	Manual, paper-based processes	Some online services	Fully digital services & automation ⁷
IT Governance	Informal / decentralized	Basic governance structure	Formal IT governance + strategic plan ¹
Capital Planning	Reactive replacements	Planned lifecycle (3–5 yrs)	Long-term capital strategy (5–10 yrs) ¹
Vendor Dependence	High (outsourced heavily)	Balanced internal + vendor support	Strategic vendor partnerships ³



Category	Low Maturity / Underfunded	Moderate / Typical	High Maturity / Strategic
Data & Analytics	Limited reporting	Some dashboards / reporting	Data-driven decision-making culture ²

IT Funding Benchmark and Best Practice Sources

¹ *Government Finance Officers Association – Budgeting best practices and IT investment benchmarks*

² *Gartner – IT spending benchmarks and maturity comparisons*

³ *International City/County Management Association – Local government staffing and organizational trends*

⁴ *Center for Digital Government – Digital maturity and systems integration*

⁵ *National Association of State Chief Information Officers – Cybersecurity priorities and investment trends*

⁶ *Deloitte – Digital government transformation insights*

⁷ *GovTech – Municipal IT spending and service delivery trends*

⁸ *CompTIA – Public sector IT workforce trends*



Future Projects Matrix

Strategic planning defines a clear organizational strategy and aligns it with the goals and objectives the organization seeks to achieve. It operates at a broad, enterprise level—guiding long-term growth, shaping multi-year priorities, and ensuring that day-to-day decisions support the organization’s mission and vision.

Where **strategy** clarifies *why* certain actions matter, the **plan** outlines *how* those actions will be conducted. Effective strategic planning integrates these elements, enabling the organization to chart the most effective path forward. Appendix B includes a matrix of project objectives developed through this process, providing a structured view of the initiatives that will help advance the goals of this strategic plan.

Due to rapidly evolving market conditions and ongoing changes in technology pricing, detailed cost estimates have not been included for each initiative within this IT Strategic Plan. Current market research does not provide a sufficiently reliable basis for developing accurate, defensible project-level budgets for each project/task shared by the City at this time. The project matrix focuses on foundational and strategic priorities in addition to security related costs. Projects not included in the 5-year plan or identified in future years can be reevaluated for inclusion using the recommended tactical plan updated process. At that time, updated market assessments and vendor engagement will identify cost estimates that will be more precise for budgeting and funding requirements. This approach ensures financial decisions are based on the most current and relevant data while maintaining alignment with the City’s long-term technology objectives.

The initiatives in the matrix represent a foundational set of opportunities rather than a complete inventory of all future projects. As the organization progresses, its needs, priorities, and operational environment will continue to evolve. Maintaining flexibility ensures the City can adapt to emerging challenges and opportunities. With this in mind, the matrix should be viewed as a starting point for strengthening the City’s information technology environment and enhancing the IT Division’s service delivery model. With this understanding, future projects not included in the 5-year plan, should be evaluated and prioritized on an ongoing basis by the City’s internal IT Executive Committee based on funding capacity and staff availability.



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- **City of East Palo Alto Leadership and Staff**

We extend our gratitude to the management and personnel across multiple departments who contributed their perspectives, operational knowledge, and candid feedback. Their commitment to public service and openness to dialogue reflect the exceptional caliber of East Palo Alto's municipal workforce.

- **Information Technology Division**

Special thanks to the IT Division for their invaluable cooperation throughout the assessment process. Their willingness to engage in interviews, provide documentation, and clarify technical workflows greatly enriched our understanding and analysis.

- **Municipal Information Systems Association of California (MISAC)**

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Appendix A – Governance Structure

The following is an example of best practice for governance in a local government setting.

IT Governance Decision Matrix			
	IT Manager	ITBC	ITEC
IT Principles & Policies	Reviews/Recommends		Decides
IT Architecture	Decides	Gives Input	
IT Infrastructure	Decides	Gives Input	
Business Applications	Reviews/Recommends/Decide	Gives Input	Decides ²
IT Investment	Reviews/Recommends/Decide	Recommends	Decides ²

- 1) The IT Manager may approve investments and applications below the \$10,000 or 40 hour thresholds. Project Request Forms should be submitted for projects above these thresholds. A service desk ticket should be created for request below these thresholds.
- 2) The IT Executive Committee approves investments and applications above the \$10,000 and 40 hour thresholds and is the sounding board for small projects not approved by the IT Division.

Roles of I.T. Governance

Information Technology Executive Committee (ITEC)

The ITEC leads the City in defining and managing the business requirements of the City. The committee supports the development of enterprise information strategies, high-level policies, and standards; overseeing information technology investments; and creating a secure and efficient information management environment. This must be done in the proper context of business strategies and operational requirements. In discharging its responsibilities, the Committee shall have the sole authority to, and shall, do the following:

1. Develop annual IT Business Strategy
2. Approve Technical Standards
3. Set and provide commitment to IT Principles
4. Identify business needs that are candidates for technology solutions
5. Review, authorize, sponsor, and prioritize enterprise technology efforts
6. Recommend to the City Manager Technology CIP and special Operating Budgets
7. Stay abreast of project progress and resolve high level issues
8. Resolve Escalation items between IT and Departmental Request



Desirable Behaviors:

1. Holistic view of business and IT
2. Identify strategic technologies and standards
3. Consider IT as another business investment
4. Reduce Costs
5. Improve Customer Service
6. Enhance internal and community communications
7. Centralized Purchasing
8. Standardized Project
9. Methodology Information

Technology Officer:

The Information Technology Officer will chair the ITEC and make decisions on IT architecture and infrastructure. The IT Officer is responsible for providing input and recommendations for the use of modern technology (hardware, software, and policy) and better use of existing information assets. The IT Officer will work with the ITEC and Executive Management Team to provide education, strategic direction, coordination, and support for the technologies needed for an enterprise information framework.

Membership

The IT Executive Team is composed of representatives from the City Manager's office, Finance, and IT, and two to four representatives of the executive management team, preferably one member from public safety.

Information Technology Business Committee (ITBC)

This ITBC will meet on an as needed basis and be responsible for giving input on IT Architecture, IT Infrastructure, Business Application needs and developing cost benefit analysis in the direction of the ITEC.

Committee Roles

1. Research and analyze process improvement initiatives
2. Recommend common platforms, standards, and infrastructure changes
3. Communicate strategic project management updates
4. Help to identify and coordinate enterprise technology needs
5. Understand the basic levels of technology and impacts on integration
6. Technical exchange of information
7. Conduct research and/or gather resource requirements requested by the ITEC
8. Demonstrate the improvements in business processes expected from proposed technology

Desirable Outcomes



- 1) Provide Summarized Business Analysis to ITEC
- 2) Enhance Customer Communications
- 3) Communicate Strategic Plan and updates to Departments
- 4) Assist Business Units to see benefits rather than inconveniences



ITEC Charter Example

City of East Palo Alto Information Technology Executive Committee Charter

The Information Technology Executive Committee (ITEC) is responsible for aligning Information Technology, innovation, and social media activities with the City Council goals and City of Concord's strategic vision, mission, and objectives.

1. Purpose

The ITEC has been established to identify and prioritize major technology projects, initiatives, proposals, recommend organization IT best practices, and assist with IT strategic planning. In doing so, the committee serves as a major coordination and communication vehicle among departments.

2. Committee Structure

The ITEC consists of the City Manager or designee, Director of Information Technology, Finance Director and Directors of City Departments that are actively engaged in the application of information systems to fulfill their business needs.

The City Manager or designee will be the committee sponsor/champion. The Director of Information Technology will chair the committee and serves to provide counsel to the committee.

The ITEC is to set overall City information technology direction with the goal to achieve maximum benefit within the allocated resource levels. This effort warrants direct participation by the Department Directors. If a Director cannot attend the meeting, they are not to send an alternate. Directors may bring their staff to the meeting to discuss specific items. In addition, other staff may be requested to participate as appropriate.

3. Procedure

- a. The ITEC meets during the budget process and is needed for mid-year requests or as called by the committee sponsor or chair.
- b. The ITEC, on recommendation from the Information Technology Department, reviews and makes recommendations to the Committee on matters related to all City Information Technology projects and may include the following:
 - i. Information Technology mission, strategy, and long-range plan



- ii. Annual budget and long-term priority setting for new and ongoing projects
- iii. Standardizing hardware and software
- iv. Funding recommendations
- v. Best Practice recommendations
- vi. Interdepartmental coordination

Committee members may be assigned specific tasks or may provide presentations to clarify project definition, to commit and schedule their department resources (personnel and equipment) to timely completion of reviewing project requests and making recommendations in an enterprise manner on matters before the Committee.

City information technology projects planned for the annual budget approval process or initiated during the course of the year will be submitted to the ITEC for review. The committee will recommend a course of action to the City Manager and the Department Director initiating projects that are consistent with the City's information technology long range plan and strategy.

The Information Technology Division provides a list of Information Technology projects for review and prioritization by the Steering Committee. Information provided will include an estimate of the Total Cost of Ownership representing costs required to accomplish each project and to maintain each solution for a period of 5 years. A formal project submission form and approval process by the ITEC is required before information technology projects are undertaken by the City.



ITBC Charter Example

City of East Palo Alto Information Technology Business Committee Charter

1) Purpose

This team will meet at a minimum on a quarterly basis and be responsible for giving input on IT Architecture, IT Infrastructure, Business Application needs and developing cost benefit analysis in the direction of the ITEC.

The ITBC has been established to provide regular updates on major technology projects and initiatives, evaluate technology IT best practices and provide recommendations to the IT Executive Committee, and to serve as a technology operations coordination and communication vehicle among departments.

2) Committee Structure

The ITBC consists of the *(insert appropriate IT Operations Lead/Manager title here)* or designee and at least one staff member from each City Department that has a good technical understanding and is actively engaged in the application of information systems to fulfill their business needs. It is anticipated larger departments may have multiple members on the committee.

The IT Director or designee will be the committee sponsor/champion. The *(insert appropriate IT Operations Lead/Manager title here)* will chair the committee and serve to provide counsel to the committee.

The ITBC Committee Roles include:

- Research and analyze process improvement initiatives
- Recommend common platforms, standards, and infrastructure changes
- Communicate strategic project management updates
- Help to identify and coordinate enterprise technology needs
- Understand the basic levels of technology and impacts on integration
- Technical exchange of information
- Conduct research and/or gather resource requirements requested by the ITEC
- Demonstrate the improvements in business processes expected from proposed technology.

Desirable Outcomes

- Provide Summarized Business Analysis to ITEC
- Enhance Customer Communications
- Communicate Strategic Plan and updates to Departments
- Assist Business Units to see benefits rather than inconveniences



Appendix B - Future Projects Matrix

The following matrix outlines the project objectives identified through the strategic planning process and is intended to help the organization focus on the actions necessary to advance the goals of this strategic plan. These initiatives represent key opportunities to strengthen the City's information technology environment and enhance the IT Division's service delivery model.

While the matrix provides a structured starting point, it is not intended to serve as an exhaustive list of all potential projects. As the City's needs evolve and progress is made, additional initiatives may emerge. Maintaining flexibility will ensure that the organization can adapt to changing priorities and continue to improve its technology capabilities over time. **(Sent by separate file).**