



City of Costa Mesa

IT Strategic Plan: Phase 2

October 13, 2026

38
YEARS

Thought Leadership,
Exceptional Performance
& Results since 1987



Roy R. Hernandez, President / Aymee Barajas, Project Manager

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Information Systems Intelligently Applied SM

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Agenda

- Goals & Objectives
- Project Approach
- Findings & Recommendations
- IT Strategic Plan Investment
- Next Steps



IT Strategic Plan Vision



Vision

Adopt a comprehensive Information Technology Strategic Plan & Roadmap in the most strategic, innovative, and cost-effective manner.

Mission

Enhance Internal City operations to foster:

- Business process improvement
- Increased operational efficiencies
- Enhanced customer service delivery

IT Strategic Plan Goals



- Connect technology resources and initiatives to core City business values and mission.
- Define a clear set of goals, guiding principles, and strategic priorities as a framework for delivering IT services.

Objective: Provide an IT Strategic Plan that is:

- Actionable with sufficient specificity
- Technologically viable
- Fiscally responsible
- Responsive to business & community needs

Comprehensive Strategic Planning Waterfall Method

Discovery

- Council Interviews
- Community Outreach:
 - Online Survey
 - Community Workshops
 - Compile Data

Assessment

- IT Focus Groups
- Online Staff Survey
- Management Interviews
- Business Requirements Definition

Strategy

- IT Strategic Plan
- Prioritization
- ITSP Implementation Roadmap
- Executive Presentation

Participatory Approach, “No Stone Unturned”



CITY OF COSTA MESA - ITSP Phase 2

Introduction to the City's IT Strategic Plan Survey

The City of Costa Mesa is carrying out an Information Technology Strategic Plan & Implementation Roadmap (ITSP). The ITSP will help inform how emerging technologies can best support your work unit and prioritize projects across the City. The objectives of the project are to:

- Carry out an evaluation of the City's business and service delivery needs
- Address the most critical technology needs of the organization
- Produce a 5 year road-map for improving the City's Information Technologies, including hardware, software, implementation, IT skills sets, staff training and related estimated costs

In order to develop the most responsive ITSP we are seeking feedback directly from City staff. We are looking for your open and honest responses.

The survey should take approximately 5 minutes to complete. The data collected will be added to other data collected in the project and used to develop a roadmap in line with, and in support of, efficient and responsive City operations. Your feedback is essential in helping define the most significant business and service delivery requirements to produce a technically viable and financially sound ITSP and Roadmap.

Let us know if you have any questions. Thanks for participating!

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Next

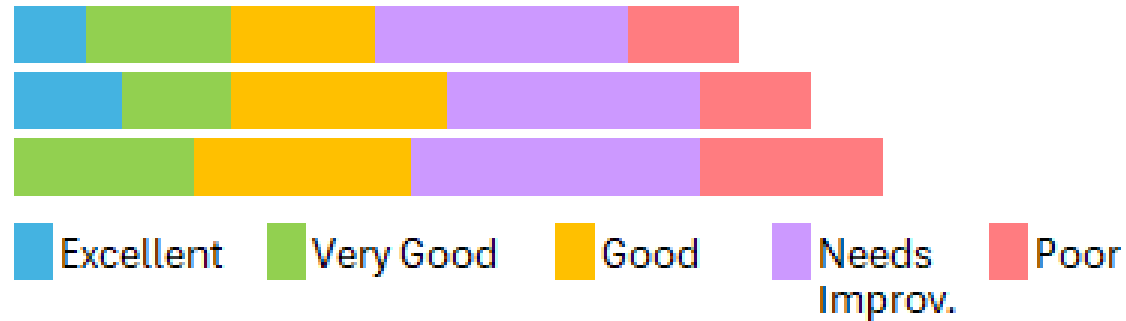
- 13 Management Interviews
- 4 Focus Groups with IT Staff
- 64 Online Staff Survey Responses
- 261 Respondents to Online Community Survey
- 5 Community Workshop Participants
- 2 City Council Survey Responses
- 11 Rapid Workflow[®] Workshops
163 total staff participated, 53 staff attended multiple workshops

Management Interview Input

Adequate of Staffing Levels

Technical Knowledge & Training

Budget & Allocation of Resources



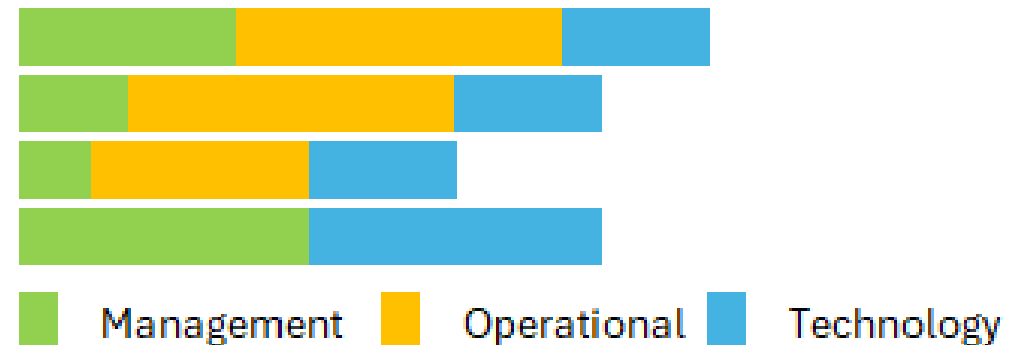
IT Focus Group Input

Infrastructure Challenges

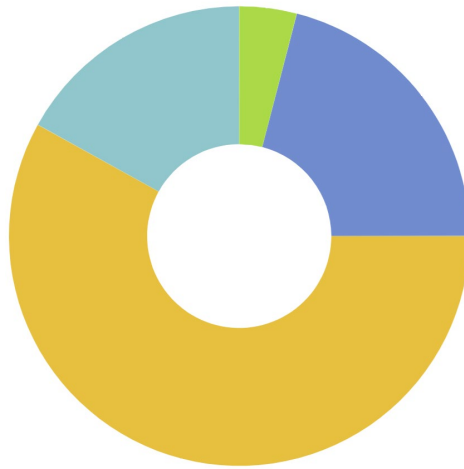
Hardware Challenges

Software Challenges

IT Organizational Challenges



Online Staff Survey: State of City IT Services



Legend

- Excellent
- Very Good
- Good
- Poor

2020 ITSP

4.07%
20.33%
58.54%
17.07%

2025 ITSP

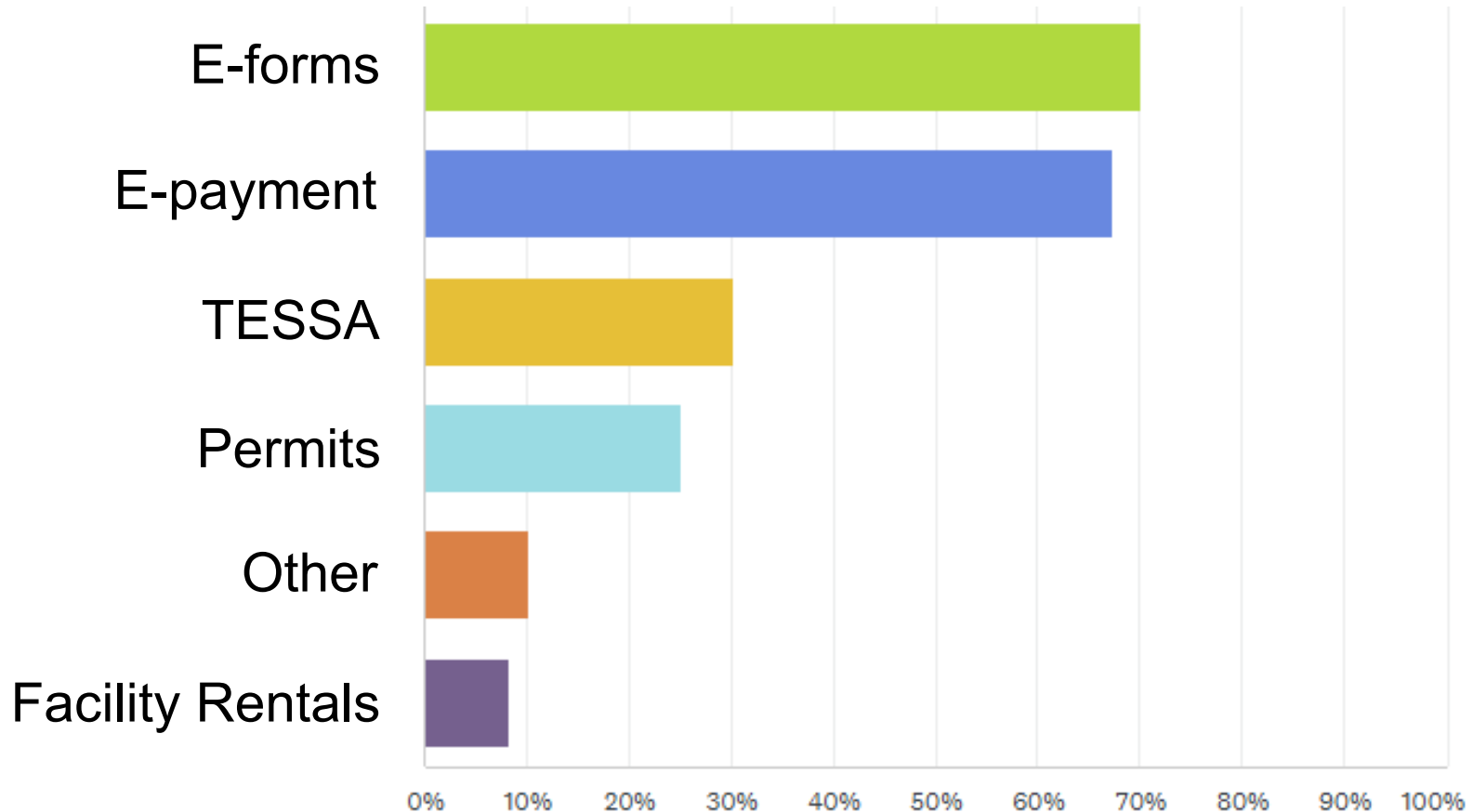
12.50%
37.50%
42.19%
7.81%

Improvement

300%
46%
-12.5%
54%

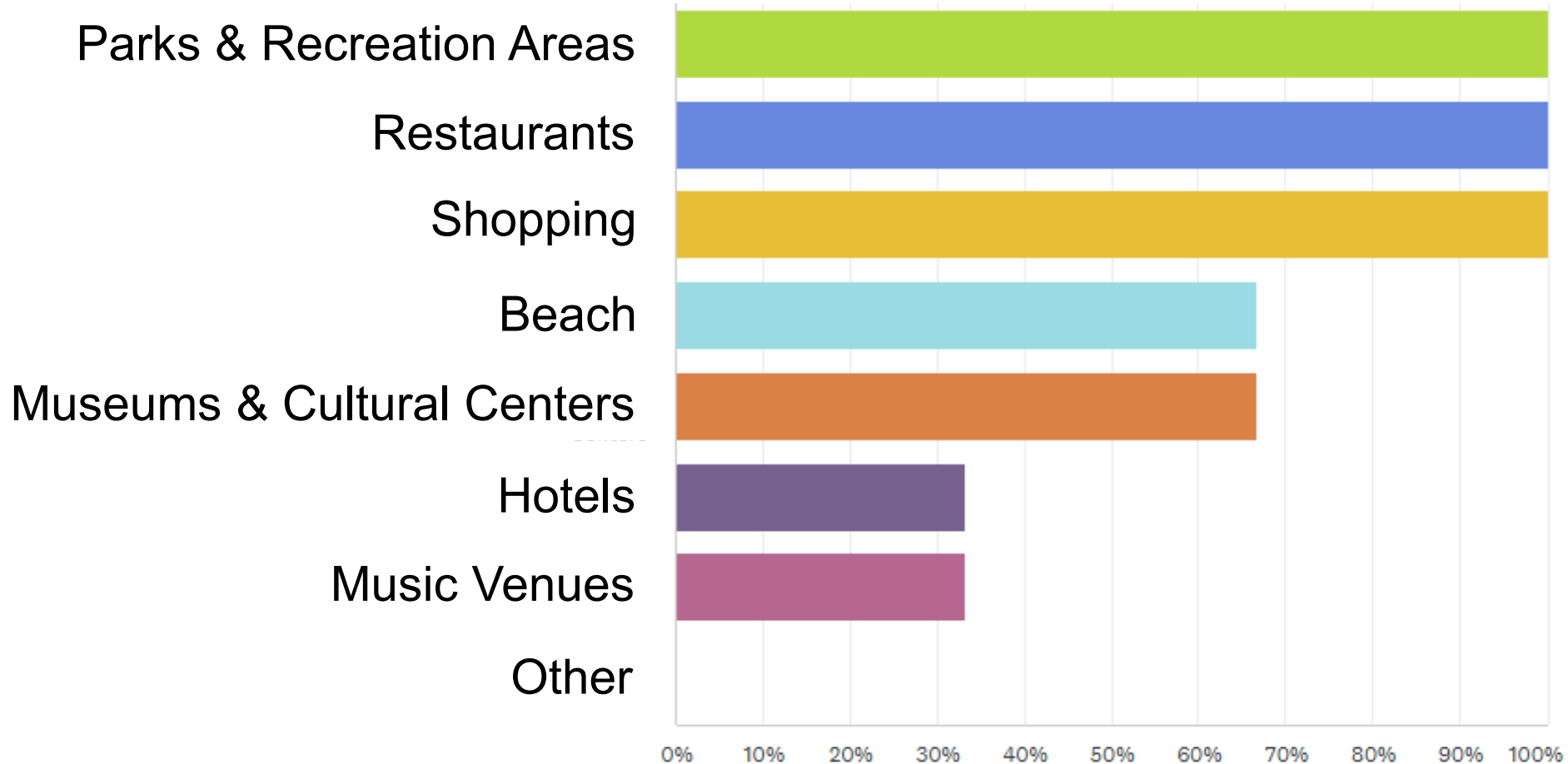
Online Community Survey: Residents

Which City website services do you use the most often?



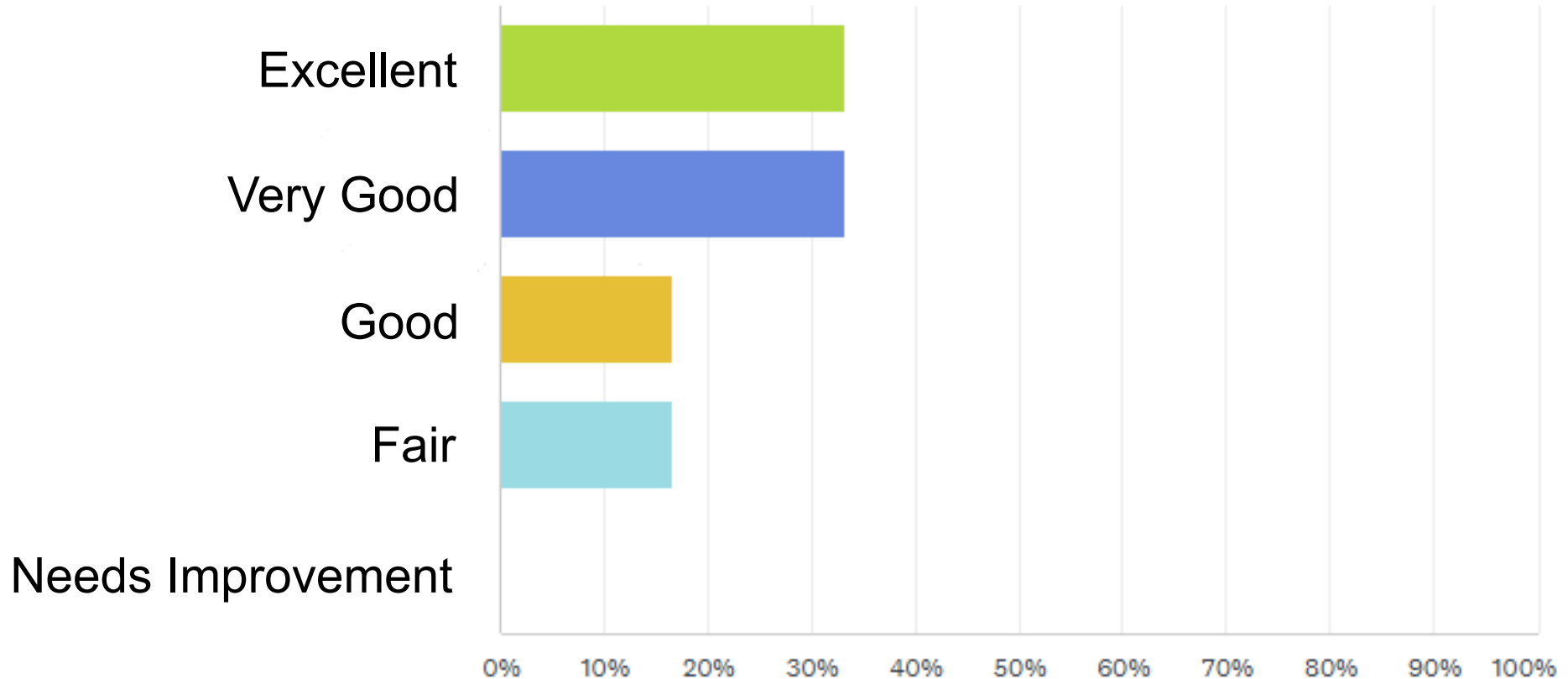
Online Community Survey: Visitor/Tourist/Commuter

Which of the following do you frequent the most?



Online Community Survey: Businesses

Rate your overall experience using the City's website.



City Council Responses

Please rate the relative importance of Information Technology as it applies to supporting and/or realizing the City Council Goals?

City Council Goals	Rating
1. Maintain and enhance the City's facilities, equipment, and technology.	1 ☐ 2 ☐ 3 ☐ 4 ☐
2. Strengthen the public's safety and improve the quality of life.	1 ☐ 2 ☐ 3 ☐ 4 ☐
3. Achieve long-term fiscal sustainability.	1 ☐ 2 ☐ 3 ☐ 4 ☐

Ratings: 1: Very Important 2: Important 3: Somewhat Important 4: Not Important

Rapid Workflow® Process Improvement Map

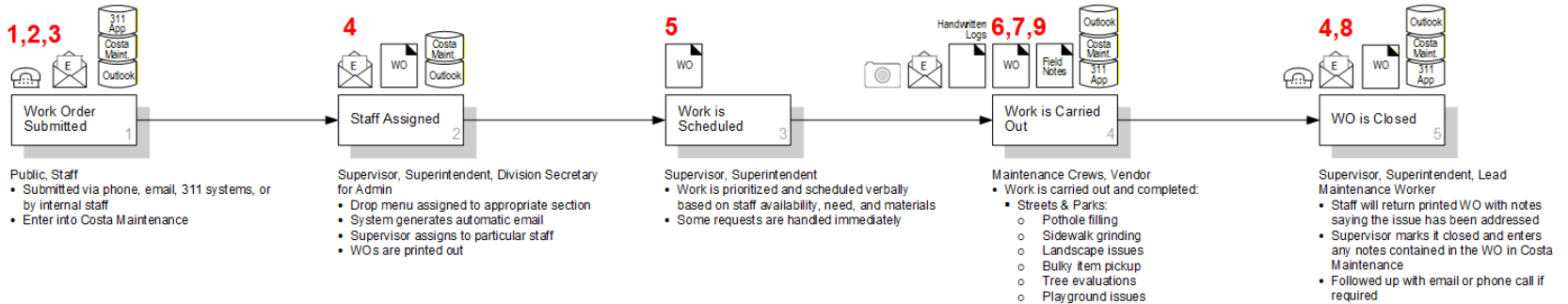


Information Technology Strategic Plan Refresh
City of Costa Mesa

Rapid Workflow® Process Models
July 28, 2025

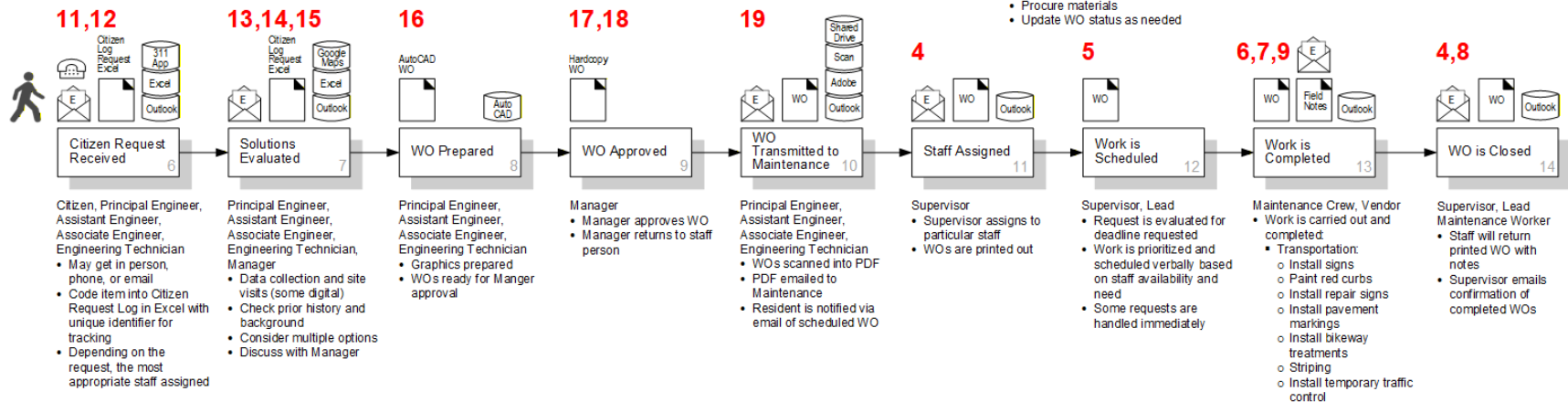
Session 3: CMMS - Costa Maintenance Work Orders As-Is Business Process

Facilities, Parks, Streets



General: 10

Transportation



Rapid Workflow® Process Solutions



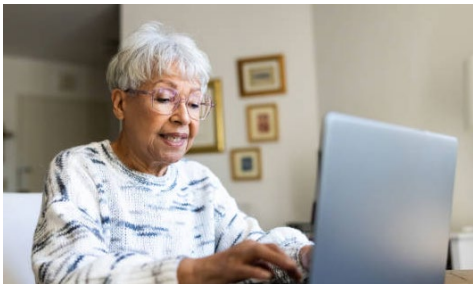
Information Technology Strategic Plan Refresh
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July 28, 2025

Session 3: CMMS - Costa Maintenance Work Orders As-Is Business Process

Problems	Solutions	Benefits
Facilities, Parks, Streets - Two separate systems that don't communicate, i.e., 311 and Costa Maintenance. 311 nonspecific requests. 311 requests submitted to the wrong department. Lack of appropriate category. - WOs are printed out. - Verbally assigning WOs. - Updating WOs in hardcopy. - WO categories are not in Costa Maintenance dropdowns. - Supervisor has to mark closed instead of doing it out in the field. - Keeping separate handwritten logs. - Not able to create Year End Reports. Transportation - Not an automated system. - Nonspecific requests received via email, phone, and in person. - Reviewing prior history is a challenge. Have to go to staff and rely on institutional knowledge to check prior history. - Have the data in Excel, or not having the data in a single location. - Manager availability. Can be busy. - QAQC. - Manager approval in hardcopy. - May have hardcopy WO iterations, back and forth discussions before a WO is approved. - Scanning and emailing WOs.	Features & Functions - Electronic Work Orders - Update workorders electronically. - Categories of WOs: - Streets & Parks: - Pothole filling - Sidewalk grinding - Landscape issues - Bulky item pickup - Tree evaluations - Playground issues - Street sweeping - Etc. - Facilities: - Plumbing issues - Electrical issues - Pest control - HVAC - Painting - Furniture - Etc. - Transportation: - Install signs - Paint red curbs - Install repair signs - Install pavement markings - Install bikeway treatments - Striping - Install temporary traffic control - Etc. - Close WOs electronically in the field. - Ability to provide comments in WOs. - Log Categories: - Pothole Log: - Date - Location - Worker - Work Performed - Sidewalk Grinding Log - Date - Location - Size of offset - Worker - Description - Bulky Item Pickup Log - Mattress - Playground Repair Log - Date - Location - Worker - Description - Transportation Requests: Identify specific attributes: - Location - North, South, East, West - Description - Geocoding - City boundaries - Contemporary Graphical User Interface: - Dropdowns: - Limb down - Tree down - Tree evaluation - One central system for everybody. - Workflow: - Routing - Notifications - Review & Approve - Review & Return for Edits - Delegation - Forms - E-signatures - Database of history: - Prior efforts at location - Tracking database of traffic and speed data. - Transportation: - Install signs - Paint red curbs - Install repair signs - Install pavement markings - Install bikeway treatments - Striping - Install temporary traffic control - Etc.	Facilities, Parks, Streets - Efficient. - Faster delivery of service. - Less confusion. - Easy to train. - More efficient. - More clarity. - Better identifies what the need is. - Same as #2. - More efficient. - Hardcopy would not get lost. - Same as #4. - Same as #4. - More user friendly, more accurate reports. - Reduce staff time. - Same as #4. - Information would be in one place. - More efficient. - Less staff time. - User friendly reports. - Better reporting. - Better evaluation. Transportation - Same as #1. - Same as #2. - Consistency. - Better solution outcome. - More rapid decision making. - Avoid duplicate data collection. - Efficiency. - Same as #15. - Same as #15. - Higher quality outcome. - Better efficiency. - Staff time savings.

Top 10 Findings & Recommendations



- 1. City Hall EOC / PD Uninterrupted Power Supply**
Replace the existing City Hall UPS.
Benefits: Enterprise data center to run a multi-hour power outage, power failure, system operations.
- 2. City Hall Back Up Servers, SAN Replacement**
Build redundant City Hall servers at separate site.
Benefits: Continuity of operations, compliance with best practices of Emergency Dispatch Center.
- 3. Public Safety IT Service Model**
Adopt clearly defined IT support for public safety.
Benefits: Strategic use of emerging public safety systems, e.g., Real Time Information Centers.
- 4. Citizen Request Management**
Portal for public interactions, heat maps, dashboards, AI queries, public satisfaction polls.
Benefits: Centralized engagement, enhanced user experience, public feedback, increased public trust.

Top 10 Findings & Recommendations



5. Enterprise Content Management

Develop a citywide Laserfiche implementation reset rollout out plan for documents and records.

Benefits: Workflow automation, improved records managements, and streamlined response to Public Records Requests.



6. Real Time Information Center (RTIC)

Develop RTIC Roadmap: proposed IT, application integration, data management and system support.

Benefits: Staff time savings, improved workflow, improved public safety, and continuity of service.

*Improving our
City • Neighborhoods • Parks*

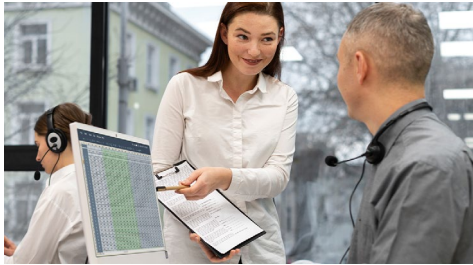


7. CIP Project Management

Automate capital planning & budgeting, project portfolio management, cost tracking, schedule/task management, and construction management.

Benefits: Centralized project tracking, CIP projects, budgets, schedules, and documents.

Top 10 Findings & Recommendations



8. Employee Information Application

Portal collecting employee contact data and push that data to Everbridge.

Benefits: Improved employee information and communication with employees.



9. IT Staff Resources

Resource the IT organization to effectively sustain existing/future ITSP systems for Public Safety, Permitting, Finance and Data Management/AI.

Benefits: Sustainability, streamlined processes, and enhanced customer service.



10. Artificial Intelligence

Promote AI objectives, metrics, desired outcomes.

Benefits: Improved efficiency and automation, better decision-making, enhanced customer service.

ITSP Initiatives

Infrastructure

1. City Hall + PD Multi Factor Authentication
2. City Hall EOC and PD UPS
3. Core Switches
4. Implement SIEM System
5. Meraki Wireless Upgrades
6. Communications Raised Floors Replacement
7. Replace Existing Firewalls
8. Dispatch Systems
9. PD Enterprise Server Replacement
10. City Hall Enterprise Server Replacement
11. Redundant Internet

Management Policies

1. Information Technology Resourcing

Hardware: Servers, Laptops, Mobile

1. Nimble SAN Replacement
2. PC/Laptop Device Replacement
3. Council Chambers AV
4. Public Safety Mobile Data Computers

Department Software

1. Public Works AutoCAD Software
2. Business Opening Application
3. Mobile Device Management Software (MaaS360)

Enterprise Software

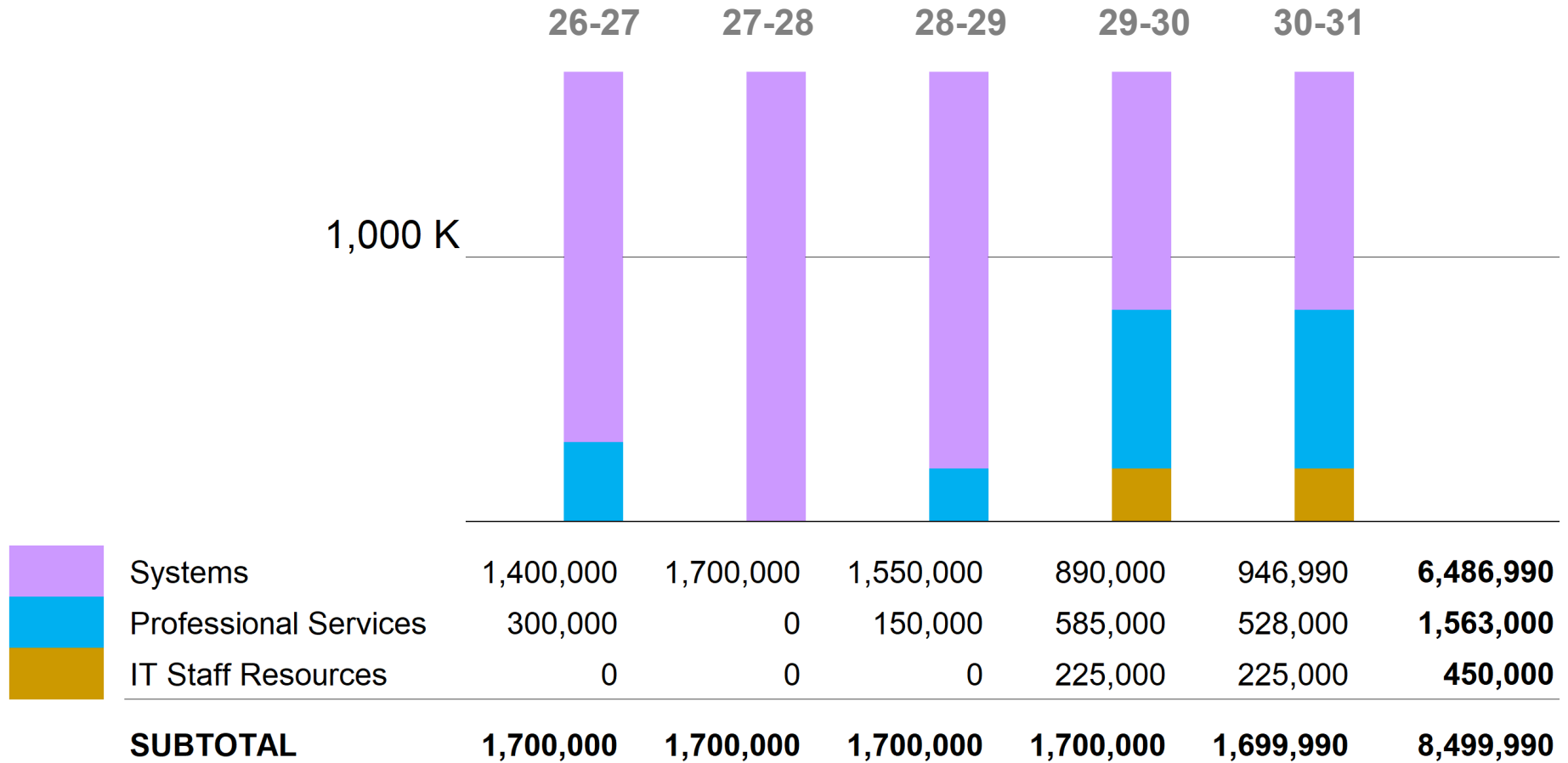
1. Citizen Request Management
2. City Council Initiative Tracking
3. CIP Project Management Software
4. Laserfiche Expansion & Adoption Plan
5. DocuSign
6. AI Tools

Prioritization Criteria



1. Times Mentioned in Project Tasks
2. Improved Customer Service
3. Business Process Improvement
4. Operational Effectiveness
5. Potential Cost Avoidance/Savings
6. Cybersecurity
7. Group IT Related Initiatives
8. Minimizing operational disruptions with IT deployments

Estimated ITSP Investment



LEGEND

Implementation



ThirdWave

Next Steps



- Approve the IT Strategic Plan and Funding
- Start Implementation Phase
- Provide an annual ITSP Status Report to Council and FiPAC



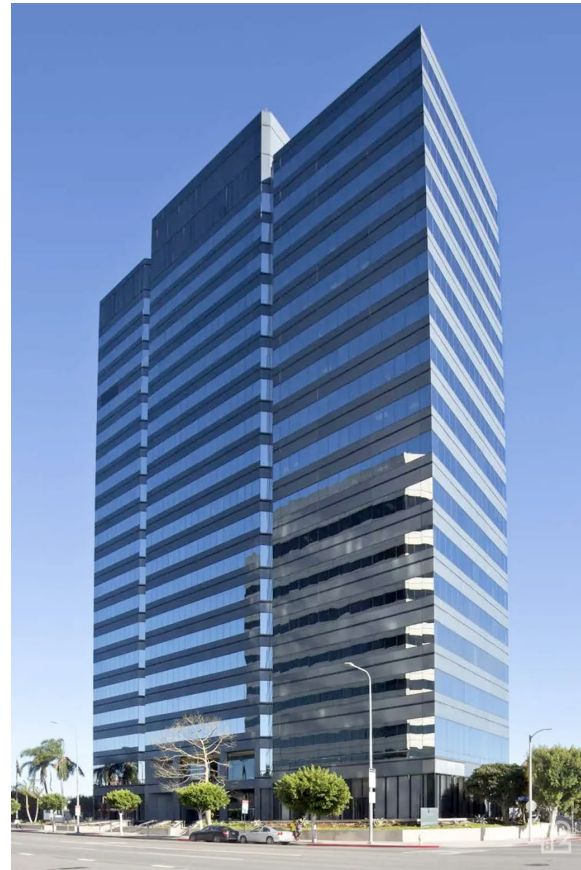
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**Thank
You!**