



Regular Meeting

January 6, 2017

**1 Dr. Carlton B. Goodlett Place, City Hall, Room 305
San Francisco, CA 94102**

AGENDA

1. Call to Order by Chair
2. Roll Call
3. Approval of Meeting Minutes from December 9, 2016
4. Department Updates and Announcements
5. FY 2018-22 ICT Plan Update
6. Discussion: Enterprise Agreements
7. Discussion: 311 Customer Relationship Management
8. Project Update: Human Management Information System
9. Public Comment
10. Adjournment

3. Approval of Minutes

Action Item

4. Department Updates & Announcements

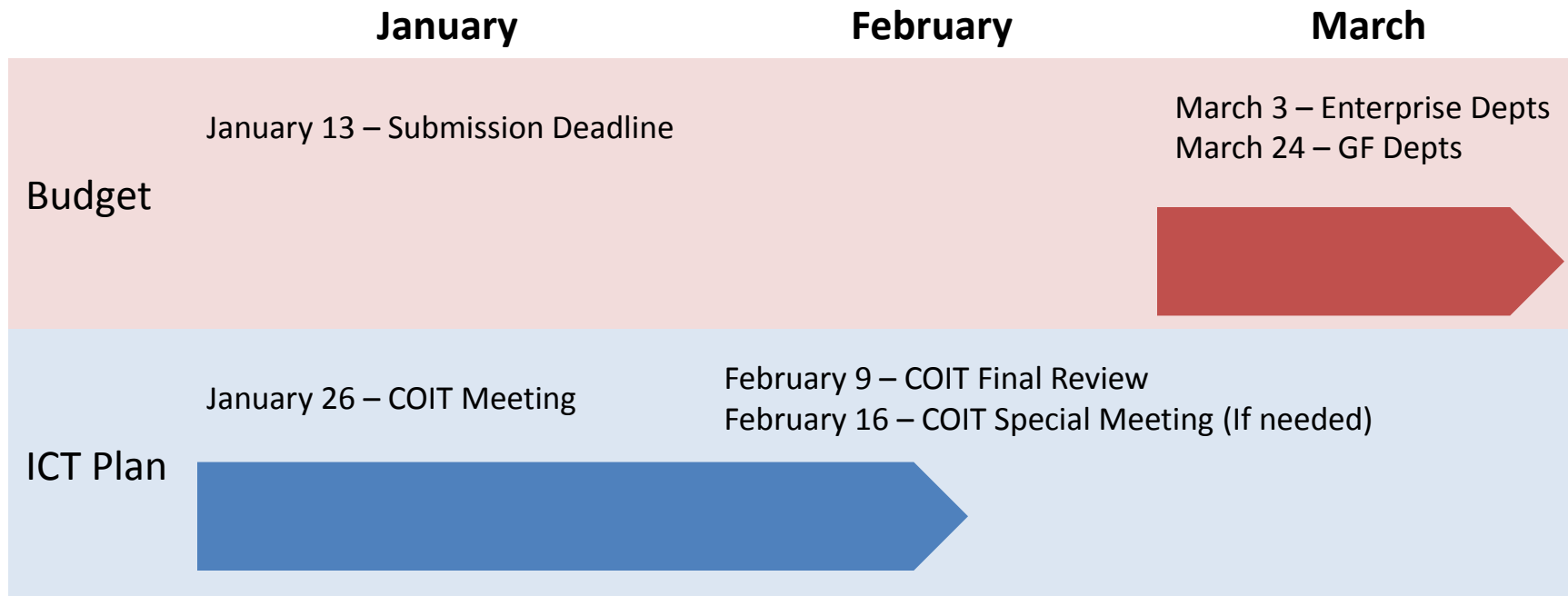
BUDGET SEASON CALENDAR

January 13: COIT Budget Submissions Deadline

COIT SharePoint Site:

<https://sfgov1.sharepoint.com/sites/ADM-COIT/SitePages/Home.aspx>

CALENDAR - KEY DATES



5. FY 2018-22 Information & Communication Technology (ICT) Plan

ICT PLAN FY 2018-22 UPDATE

Agenda

- Review Vision & Goals
- Begin Discussion on Financial Recommendations

February Agenda

- Budget Overview
- Initiatives Descriptions
- Performance Measures

ICT PLAN FY 2018-22 VISION

San Francisco City services should be easy to use and accessible to every resident, visitor, and business.

ICT PLAN FY 2018-22 GOALS

Goal 1 – Support, Maintain, & Secure Critical Infrastructure

- Cybersecurity
- Disaster Recovery
- Network
- Data Centers

Goal 2 – Increase Efficiency & Effectiveness

- Data Sharing & Architecture
- Procurement
- Hiring

Goal 3 – Improve Access & Transparency

- Digital Services
- Digital Inclusion

FINANCIAL SUMMARY

	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	TOTAL
Annual Project	11.7	12.8	14.1	15.5	17.1	71.2
Major IT	18.6	20.5	22.5	24.7	27.2	113.5
TOTAL	30.3	33.3	36.6	40.3	44.3	184.7

Note: All figures in \$ millions.

MAJOR IT PROJECT UPDATES

Major IT Allocation vs. Projected COIT Requests:

	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	TOTAL
Major IT Allocation	18.6	20.5	22.5	24.7	27.2	113.5
Projected Requests	29.8	20.3	19.2	17.8	9.2	96.3
F\$P	-	-	-	-	-	-
Radio Replacement	15.4	8.3	8.3	7.6	3.8	43.4
Property Tax Database	14.4	12.0	10.9	10.2	5.4	52.9
Total	(11.2)	0.2	3.3	6.9	18.0	17.2

Note: All figures in \$ millions.

MAJOR IT PROJECT – RECOMMENDATIONS

- Recommendation 1: COIT recommends the City continue to grow the Major IT Project allocation by 10 percent annually.
- Recommendation 2: COIT should fully fund technology projects whenever possible. Alternative financing strategies should only be employed if apparent efficiencies are achievable.
- Recommendation 3: COIT should support a comprehensive planning and scoping phase for all future Major IT Projects. Planning documentation should support future return on investment analysis, with an emphasis on identifying cost savings.

FINANCIAL OVERVIEW

FY18-22 ICT Plan

- 127 Project Requests over next 5 years

Annual Allocation vs. Projected Costs

	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	TOTAL
Annual Project	11.7	12.8	14.1	15.5	17.1	71.2
Projected Costs	69.3	58.5	45.9	28.9	25.7	228.4
General Fund Dept	65.5	56.5	45.1	28.3	25.1	220.6
Enterprise	3.8	2.0	0.8	0.6	0.6	7.8
DIFFERENCE	(57.6)	(45.7)	(31.8)	(13.4)	(8.6)	(157.2)

Note: All figures in \$ millions. Figure does not represent COIT GF requests.

TECHNOLOGY PROJECT CATEGORIES

NEW	No current IT system already exists to meet project objectives. Department must procure or build new system.
REPLACEMENT	Department is already using an IT system but must replace it.
ENHANCEMENT	Functionality of the department's IT system will be enhanced or upgraded.
MAINTENANCE	The department's IT system is in use but maintenance support is needed to stay operational.

ANNUAL ALLOCATION – RECOMMENDATIONS

Recommendation 2: To promote the investment in technologies that improve the City's operations and service delivery practices, the Annual Project Allocation should be separated between enhancement and new/replacement projects.

TECHNOLOGY REFRESH

PC Refresh Program Objectives

- Assist departments with the refreshment lifecycle of their hardware.
 - Gartner: Industry standard is 4.5 years
- Cost savings through volume discounts
- Build common application & hardware stack across the City

FY 2016-17 Purchase List for HP and Dell:

- | | | |
|----------------|----------------|-----------------|
| - Desktops | - Ultrabooks | - Speaker Bar |
| - Mini-Desktop | - Monitors | - Mounting |
| - Laptops | - External DVD | - Dock Stations |

TECHNOLOGY REFRESH

PC Refresh Program Summary

- \$925,000 annually dedicated to refreshing Department Hardware
- 25 Departments Participated in FY 2016-17

Summary of requests vs allocation

	FY 2014-15	FY 2015-16	FY 2016-17
Requests	\$1,800,000	\$1,700,000	\$1,800,000
Allocation	\$925,000	\$925,000	\$925,000
DIFFERENCE	(\$860,000)	(\$775,000)	(\$919,000)

ANNUAL ALLOCATION – RECOMMENDATIONS

- Recommendation 1: COIT recommends the City continue to grow the Annual Project Allocation by 10 percent annually.
- Recommendation 2: Distribution of fund from the Annual Project Allocation should be separated between enhancement and new/replacement projects to promote the investment in technologies that improve the City's operations and service delivery practices.
- Recommendation 3: The City should set aside a separate source of funding for the continual refreshment of IT hardware.

Enterprise Agreements |& Salesforce Overview

COIT Budget & Performance
Subcommittee

January 6, 2016



SAN FRANCISCO
DEPARTMENT OF
TECHNOLOGY

Shared Services: IT partner of choice, not the IT department of mandate.



Connectivity



Digital Service



Technology-as-a
Service



Tech Talent



Cybersecurity

Shared Services is the bedrock of the Department of Technology's strategy. We are focused on developing the right services with the right features at the right cost with the right performance levels according to customer requirements and demands.

Enterprise / Multi-Department Agreements

DT has established 12 Enterprise Agreements or Multi-Department Volume Purchase Agreements:

Vendor	Key Products / Services	DT Procurement Contact
Adobe	Acrobat, Photoshop, Creative Cloud software	Fan-Wa Wong, fan-wa.wong@sfgov.org
AirWatch	Enterprise Mobility Management (EMM) software	Jason Renteria, jason.renteria@sfgov.org
AT&T, Verizon, Sprint	Telecom & wireless services	Kathy Lu, kathy.lu@sfgov.org
CommVault	Data protection and information management software	Jason Renteria, jason.renteria@sfgov.org
ESRI	Geographic Information System (GIS) software	Jason Renteria, jason.renteria@sfgov.org
Microsoft	Desktop & server software, cloud computing platform	Kathy Lu, kathy.lu@sfgov.org
Regroup	Messaging, forums, group management software	Jolie Gines, jolie.gines@sfgov.org
Salesforce	Customer Relationship Management (CRM) software	Fan-Wa Wong, fan-wa.wong@sfgov.org
ServiceNow	IT operations & workflow management software	Jolie Gines, jolie.gines@sfgov.org
VMWare	Virtualization software and services	Jason Renteria, jason.renteria@sfgov.org

Additional DT Agreements Available for Other City Departments

Technology Agreements Assisted by DT

- Infor Building/Asset Management etc. (DPW, with DT contract management assistance)
- DocuSign (OCA contract management, DT providing implementation assistance)
- Motorola (DEM contract management, DT may provide assistance as needed)

Potential Multi-Department Agreements - Groundwork in process

- Hosted VoIP Services: RFP Scoring currently underway
- Cisco Products, Maintenance & Services: information gathering
- Accela Software and Services: negotiations currently underway

Additional DT Agreements That May Benefit Other Departments

- Cybersecurity Applications: Tenable, FireEye, Splunk
- Mass Communication System for Emergency: ReGroup

Deal Summary & Engagement Process

- Salesforce

Deal Summary:

DT recently established a Volume Purchase Agreement (VPA) with Carahsoft as the sole reseller for Salesforce products

- ❑ **New or Additional Purchase:** Core Products (35%+ Discount), Add-on Products (20%+ Discount)
- ❑ **Renewal:** Grandfathered rate
- ❑ **Cap for Price Increase:** 0% increase for Year 1 - 4, up to 5% increase for Year 5 (2021)
- ❑ **Markup from Tech Marketplace:** eliminated

Five-Step Engagement Process:

- ❑ **Step 1:** Discuss business requirements & quote with Carahsoft/Salesforce (Contact: Beth Drake Beth.Drake@Carahsoft.com)
- ❑ **Step 2:** Request DT to validate the quote according to the VPA (DT Contact: Fan-Wa Wong, fan-wa.wong@sfgov.org)
- ❑ **Step 3:** Send a Work Order to DT (DT Contact: Maria Soledad, maria.soledad@sfgov.org)
- ❑ **Step 4:** DT releases a PO on behalf of your department (DT Contact: Fan-Wa Wong, fan-wa.wong@sfgov.org)
- ❑ **Step 5:** Validate invoice and confirm to DT Contract Owner (DT Contact: Kathleen Clark kathleen.clark@sfgov.org)

Current Usage across the City - Salesforce

Department / Office	Core Products	Other Products	Estimated Annual Cost	Upcoming Renewal Date
Municipal Transportation Agency #1	Service Cloud	Govt Cloud, Social Studio, Success Plan, Community Logins	\$ 293,919	8/29/2017
Municipal Transportation Agency #2	Force.com	n/a	\$ 14,301	10/31/2017
Mayor's Office of Housing #1	Service Cloud	Community Logins	\$ 113,941	5/14/2017
Mayor's Office of Housing #2	n/a	Community Logins	\$ 86,000	8/29/2017
Department of Technology #1	n/a	Social Studio, Success Plan	\$ 92,507	11/20/2017
Department of Technology #2	Sales Cloud	n/a	\$ 9,000	8/29/2017
Department of Technology #3	Force.com	Community Logins, Govt Cloud	\$ 2,087	11/18/2017
Health Service System	Service Cloud	Govt Cloud, Success Plan	\$ 72,588	5/31/2017
OEWD/DT Business Portal #1	Sales Cloud	n/a	\$ 55,081	8/29/2017
OEWD/DT Business Portal #2	Sales Cloud	Community Logins	\$ 9,606	5/14/2017
Office of Small Business	Sales Cloud	n/a	\$ 29,535	1/17/2017
SF International Airport	Service Cloud	Success Plan	\$ 26,186	2/3/2017
Public Utilities Commission	Sales Cloud	Marketing Cloud, Success Plan	\$ 20,795	10/31/2017
Office of Civic Engagement	Force.com	Community Logins	\$ 9,732	5/27/2017
Human Service Agency	Force 100	Govt Cloud, Encryption	\$ 9,056	12/31/2017
SF Environment	Sales Cloud	n/a	\$ 9,000	8/29/2017
Recreation & Park	Sales Cloud, Force.com	Success Plan	\$ 4,946	9/4/2017
Assessor's Office	Sales Cloud	n/a	\$ 4,200	12/9/2017
Office Financial Empowerment	Sales Cloud	Success Plan	\$ 1,725	3/6/2017
Estimated Annual Total			\$ 864,205	

Competitor Analysis & Market Research - Salesforce

❑ According to Gartner, Salesforce is competing in 12 markets and a market leader in 5 of them:

- CRM Customer Engagement Center: absolute market leader, followed by Pegasystems and Oracle
- Sales Force Automation: market leader, followed by Microsoft
- Enterprise Application Platform as a Service: one of the top 2 leaders, the other is Microsoft
- Mobile App Development Platforms: one of the top 3 leaders, slightly behind IBM and Kony
- Social Software in the Workplace: one of the top 4 leaders, slightly behind Microsoft, IBM and Jive

❑ However, Salesforce is NOT a strong player in the following markets:

- Business Intelligence and Analytics Platforms: Microsoft, Tableau and Qlik are market leaders
- CRM and Customer Experience Implementation Services: Accenture, Deloitte and IBM are leaders
- Identity and Access Management as a Service: Microsoft, Okta and Centrify are leaders

❑ **Cost Benchmark - Internal:** historically City received ~20% discount, plus 5-10% markup from Tech Marketplace

❑ **Cost Benchmark - External:** 15-20% by Gartner clients, 2-10% by the State of California (OTech)

Digital Accelerator

Digital Service and Products Division
City and County of San Francisco Department of Technology



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TECHNOLOGY

Problem: Why Do We Need It?

Demand for digital products is quickly and steadily increasing, far outstripping our delivery capabilities.

Our new initiative aims to address 3 key pain points:

- Building online solutions simply takes too long
- Total cost of ownership (initial dev + support) is too high
- Limited IT resources are a major constraint to delivery

Solution: How Can We Succeed?

The DT Digital Service division has launched an innovative **Digital Accelerator team with 3 core competencies:**

- Expertise in leveraging the Salesforce cloud-based SaaS (Software as a Service) platform to enable *rapid solution development* and deliver faster time-to-market solutions
- Experience in assisting customers to *lower cost* by building quick solutions using an iterative agile approach (ex. *Real estate facilities leases app*)
- Leadership in establishing *collaborative partnerships* with vendors to overcome, while focusing on leveraging pre-built and Salesforce-integrated solutions already available on the market

Technology: What is the Enabler?

The key enabler is the **Salesforce cloud-based SaaS platform (force.com)** that combines:

- the creation of quick app solutions via 'declarative' configuration without any coding; with
- the integration of pre-built solutions via its App exchange market.

This rapid delivery approach, as researched by IDC & Gartner shows, delivers top-notch tangible benefits.

Source: IDC

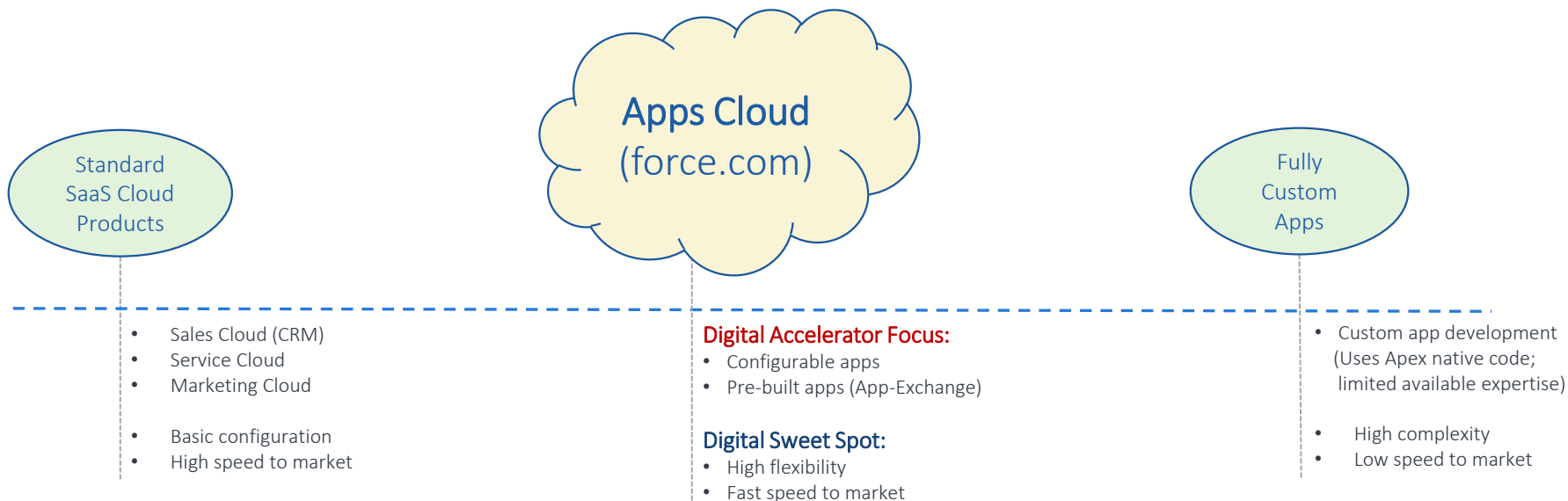
ROI Salesforce Report



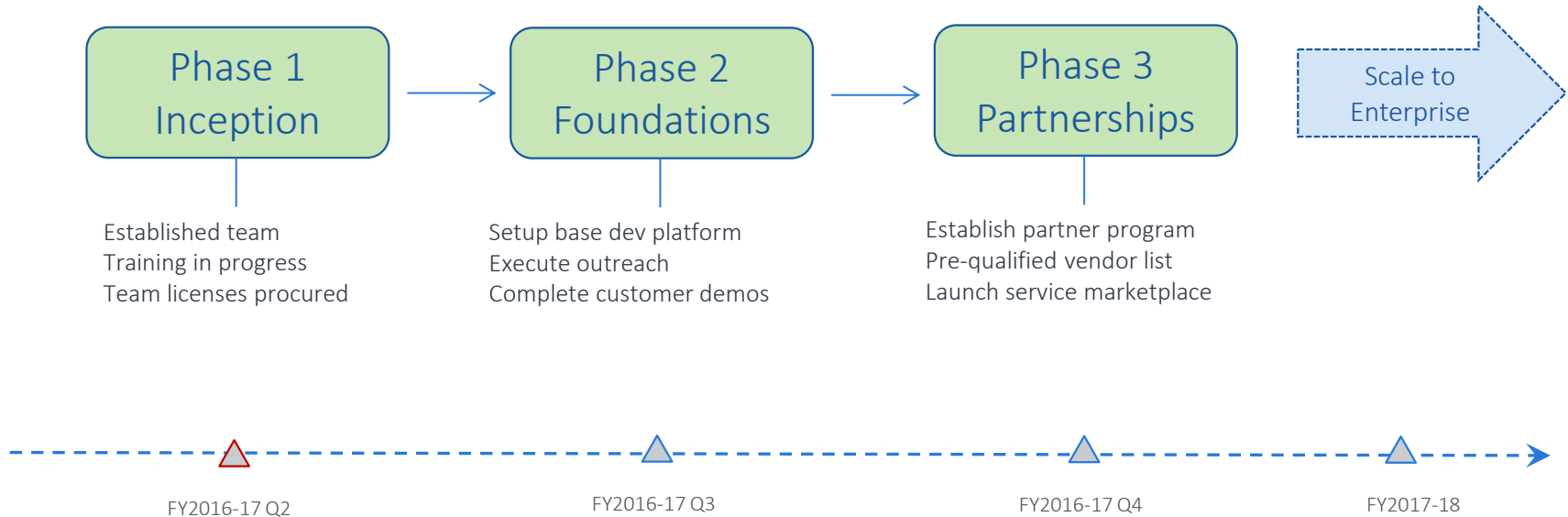
Source: Gartner Group

Magic Quadrant for
App Platform as a Service

Salesforce: How Does it All Fit?



Roadmap: Where Are We Going?



CRM – Now and Next

Andy Maimoni
Deputy Director, SF311
January 6, 2017



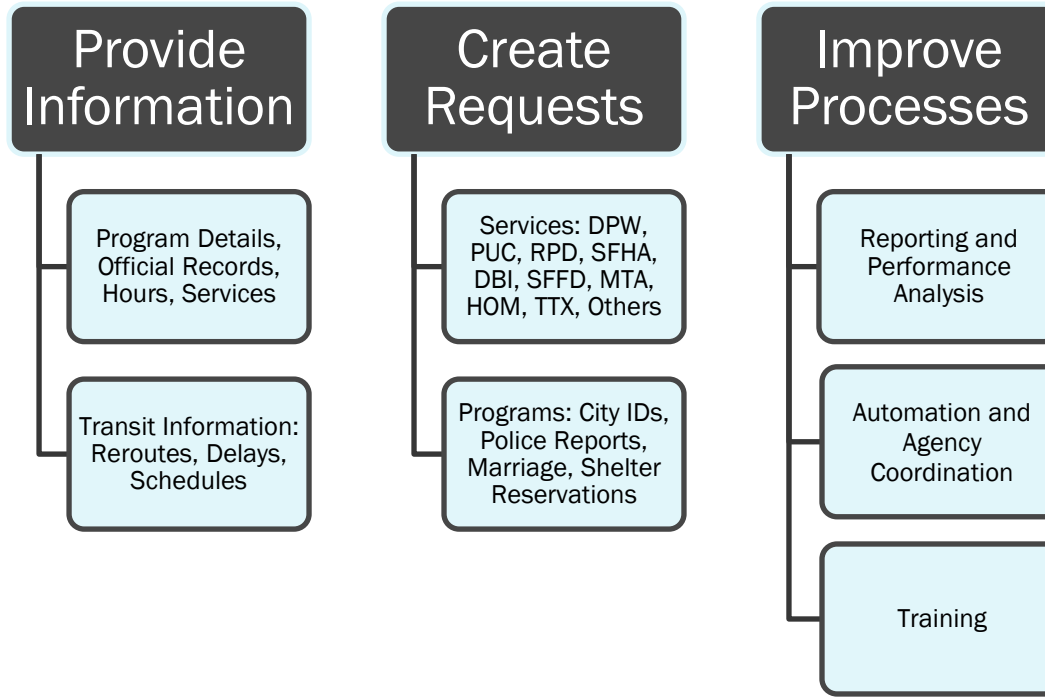
Opening the door to departments since 2007



- IN CY 2016
 - We collaborated with 50 agencies from Adult Probation to the War Memorial
 - We routed requests to over 260 distinct work groups, including external agencies
 - We referenced our knowledge base over 330,000 times to assist the public

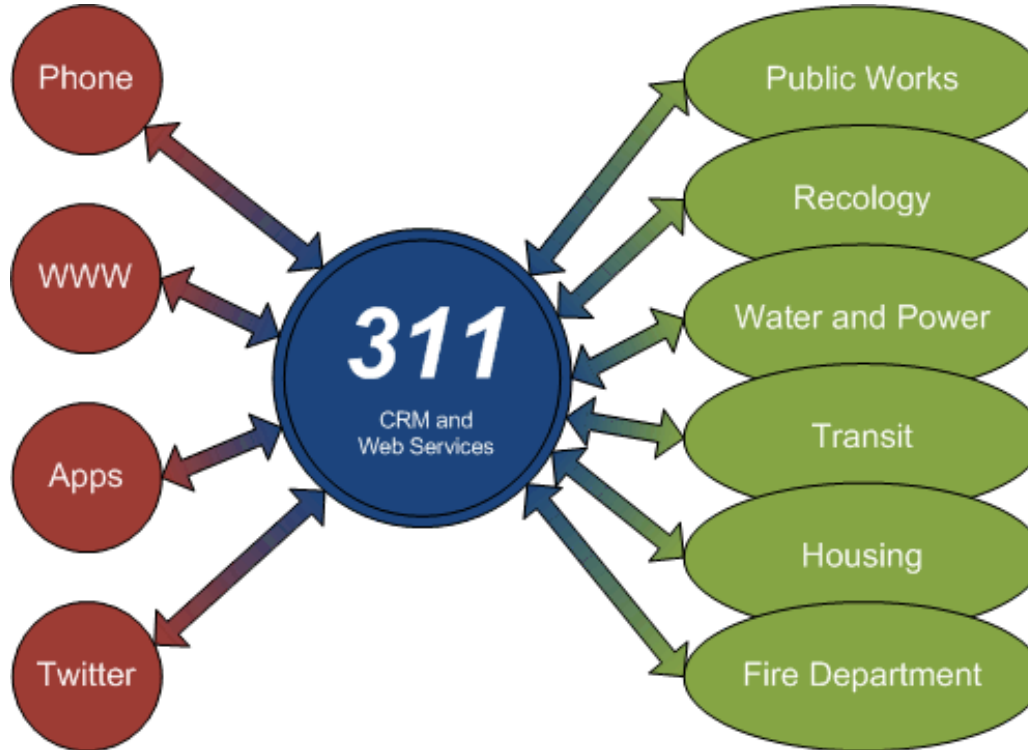


Core Services of SF311





People have a choice of contact methods





Our web brings services together

SFMTA HOLIDAY SERVICE ADJUSTMENTS 2016

SUBMIT FEEDBACK Home SFGov Track Service Requests About Help City Services Andy Maimoni

311
SAN FRANCISCO
AT YOUR SERVICE
OFFICIAL

Adopt a Drain, Protect Your Neighborhood!
Clear storm drains and help minimize flooding.

Adopt a Drain SF

Adopt a Drain Today at adoptadrain.sfwater.org

ANDROID APP ON Google play Available on the App Store

For a police, fire, medical, or other emergency, call 911 immediately

Welcome to SF311, how may I help you?

New Requests ☒

My Requests

Recent Requests

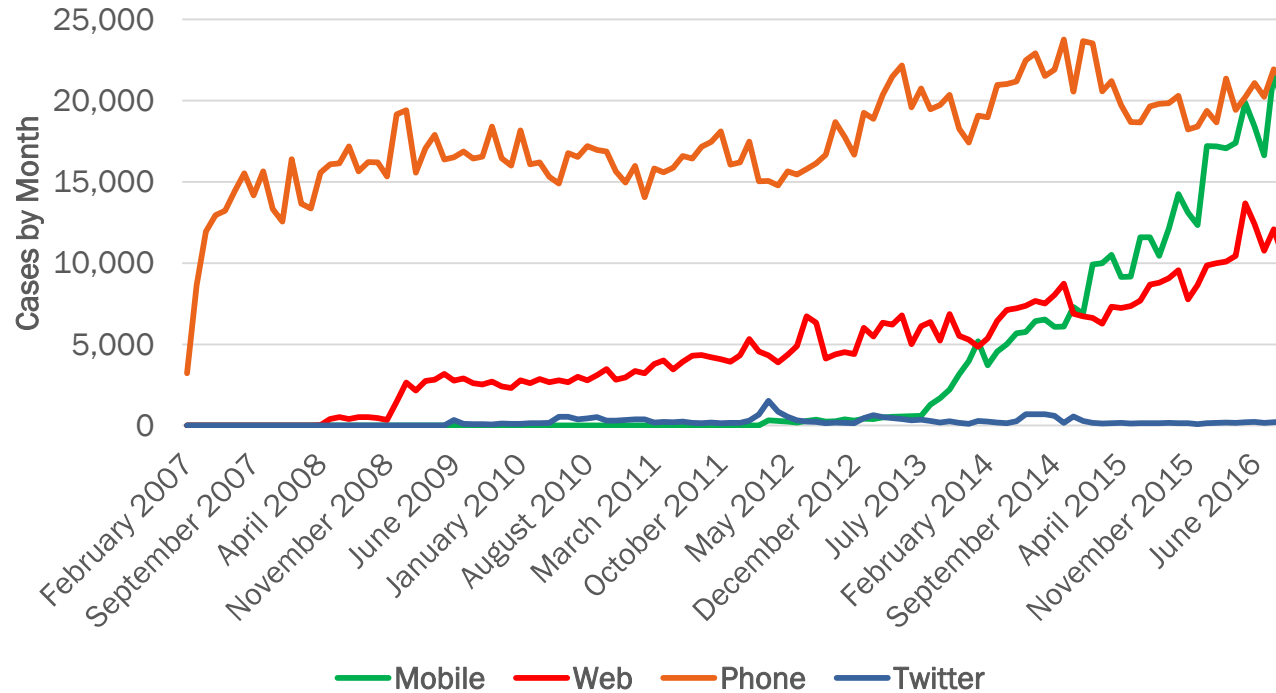
Information

Payments

Need help or language assistance? Dial 3-1-1 (within SF) or 415-701-2311 (TTY 415-701-2323) - 24 hours a day, 365 days a year



Growth of Self Service and Mobile



Mobile and Web Graffiti

Bike rack

Building - Commercial

Building - Residential

Building - Other

City receptacle

Fire/Police Callbox

Fire hydrant

Mail box

News rack

Parking meter

Sidewalk

Sign (parking and traffic only)

Sign (advertisement/other)

Signal box

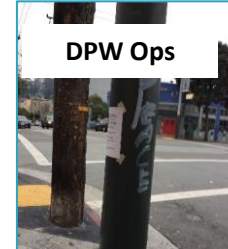
Street

Transit Shelter

Other



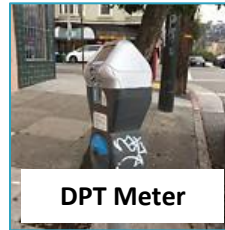
US Postal
Service



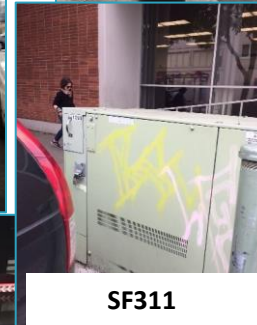
DPW Ops



DPW Ops



DPT Meter



SF311



DPW Ops



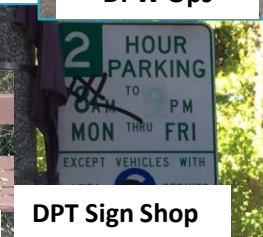
PUC
Water



Clear Channel - Transit

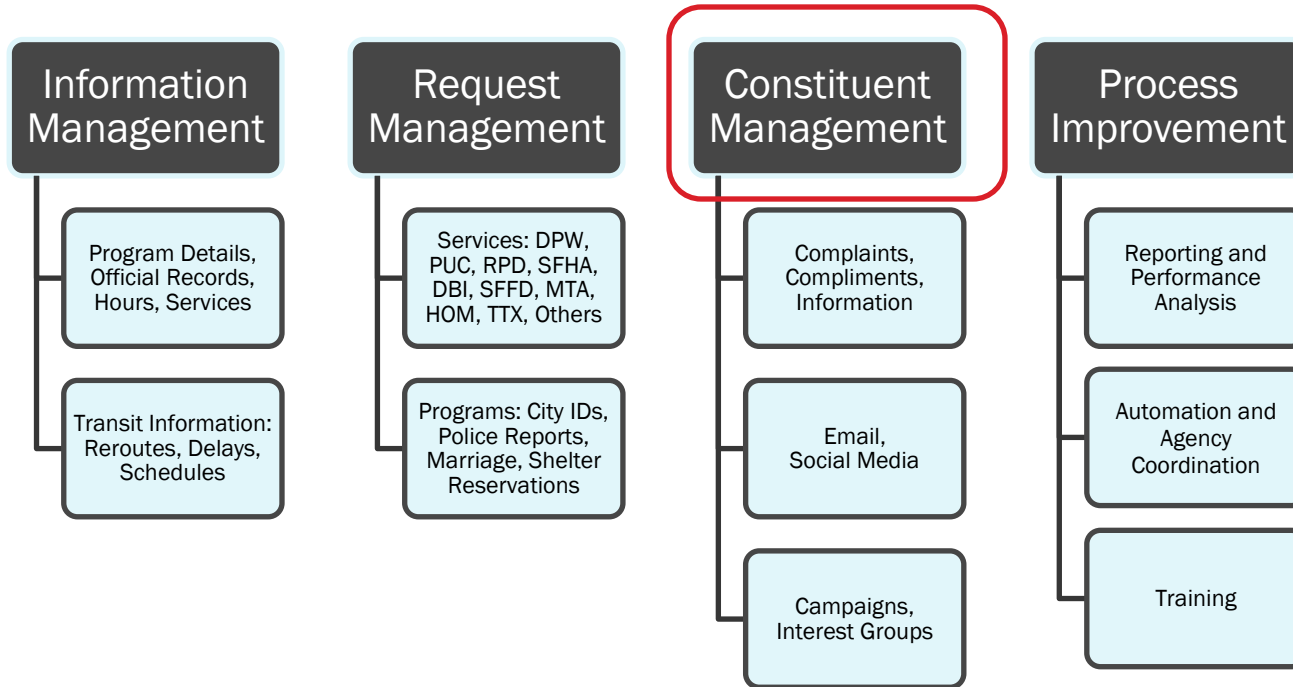


Rec Park



DPT Sign Shop

Expanding CRM Services





Upcoming Improvements

- Smarter and responsive web forms
- Ability to receive email and respond to cases
- More comprehensive and intelligent search



Feature Areas

Service
Requests

Correspondence

Information

Integration

Social

Reporting

Self Service

Artificial
Intelligence

Payment
Processing



Q&A



8. Project Update: Human Management Information System

Megan Owens, Project Manager

Department of Homelessness & Supportive Housing

Online Navigation and Entry (ONE) System

San Francisco Department of Homelessness and Supportive Housing (HSH)

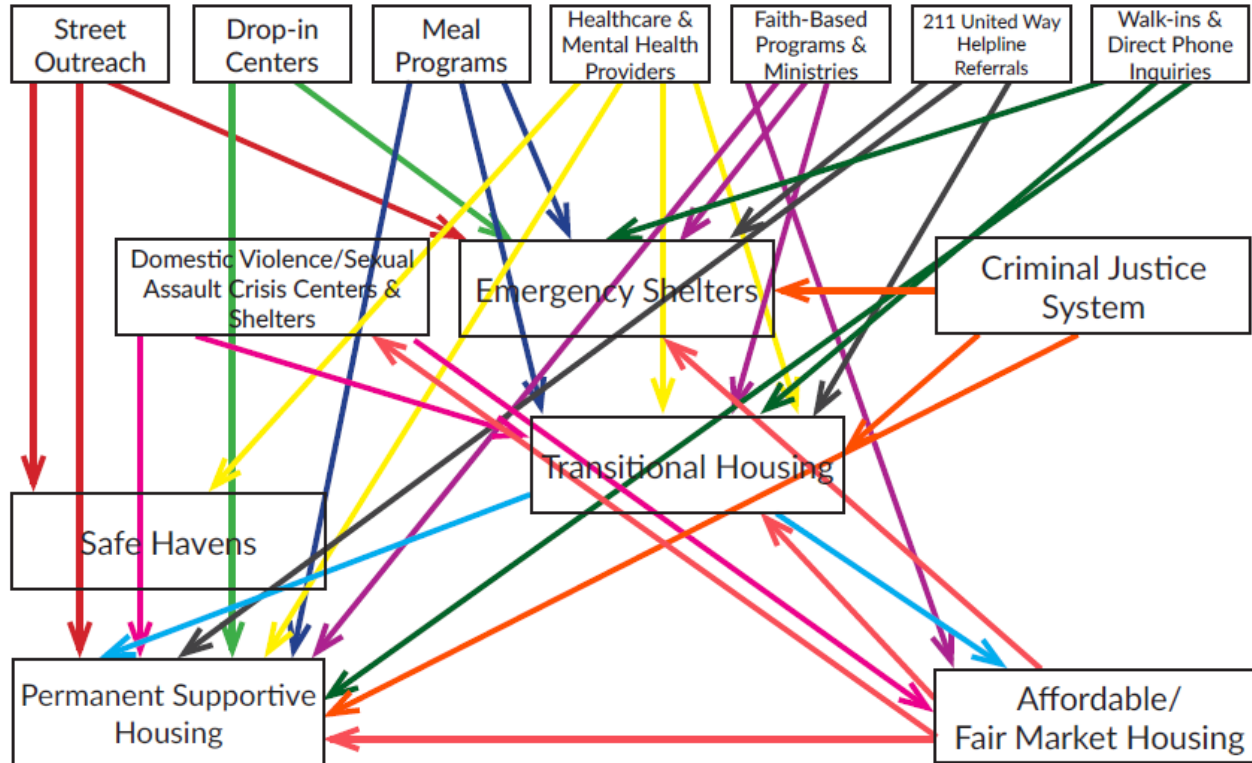
Project Objective:

Create a useful community-wide data solution to enable coordinated care of homeless households city-wide and enable a Coordinated Entry System to prioritize all homeless households.

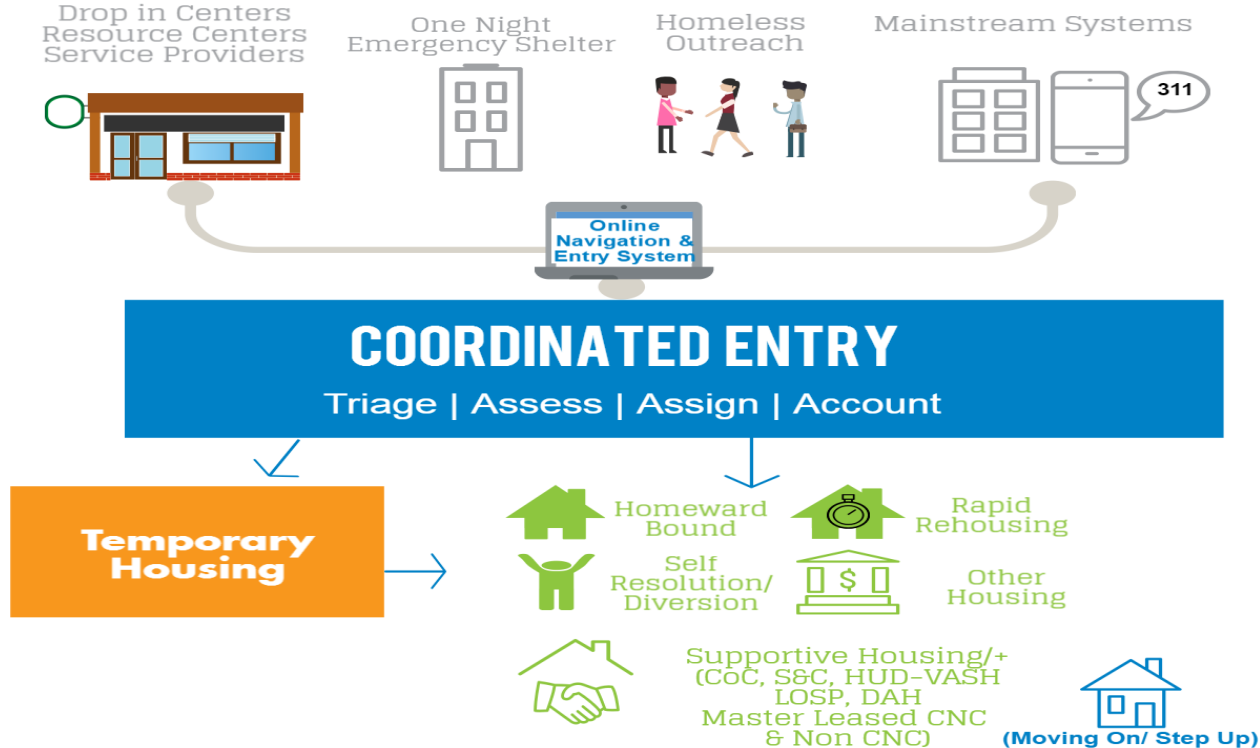
Major Stakeholders:

Department of Homelessness and Supportive Housing, other city departments over 40 non profit housing and service providers, San Francisco Local Homeless Coordinating Board, and over 7,00 homeless San Franciscans on any given night.

Online Navigation and Entry (ONE) System



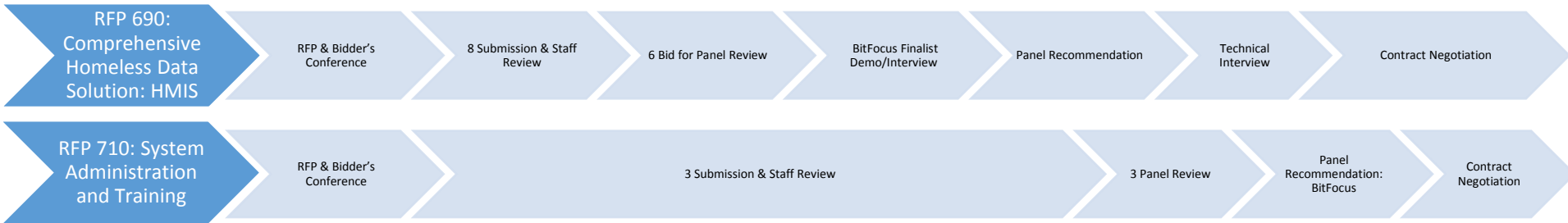
Online Navigation and Entry (ONE) System



Project Implementation Stages/Phases

Community Input and Planning	Request for Proposal	Vendor Selection and Negotiation	Initial Configuration and Migration Discovery	Public System Migration, and System Configuration	Non Profit System Customization
Jan 15, 2016- April 24, 2016	April 25, 2016- June 3, 2016	June 4, 2016- December 9, 2016	December 12, 2016- February 1, 2017	February 1, 2017- January 31, 2018	August 1, 2017- June 30, 2018
Community meetings, market research, budgeting, and best practice research	Public solicitation of new data system and third party system administrator	RFP review, vendor interviews, user testing, third party technical interviews, and one on one interview RE data system.	Basic System configuration, data migration analysis report for 3 most critical systems, and training for initial users.	Staged configuration of complete system and staged migration of 15 public systems into ONE.	Customization of the system to meet the parochial needs of the non profits, and sync data from ONE to NPO systems.

Procurement






Online Navigation and Entry (ONE) System

Project Budget	FY 16-17	FY 17-18
Number of FTE	3	3
FTE Classifications	2917, 1820	2917, 1820
Salary & Fringe	\$364,062	\$364,062
Software	\$272,837	\$343,080
Hardware	n/a	n/a
Professional Services	\$1,418,328	\$1,241,900
Materials & Supplies	\$20,000	\$20,000
Total Project Cost	\$2,075,227	\$1,969,042

Online Navigation and Entry (ONE) System

Total Project Cost	Total COIT Funding To Date	Total Other GF Funding	Total NGF Funding	Total NGF + GF Funding	Total Spent
\$2,000,000/year	\$0	\$0	\$2,075,227	\$2,075,227	\$0

Status		Comment
Scope		Project is scoped in general through June 2019. Detailed Scope in place through Feb 1, 2017.
Schedule		Project is on schedule. Schedule is very ambitious and scope is larger than previous projects with same vendor in other communities.
Budget		Project funds have all been awarded, and budget has been negotiated.
Risks	Data migration is dependent on collaboration between city departments and vendors in the termination process.	

9. Public Comment
