

6. COIT Portfolio Management & Q1 Performance Update

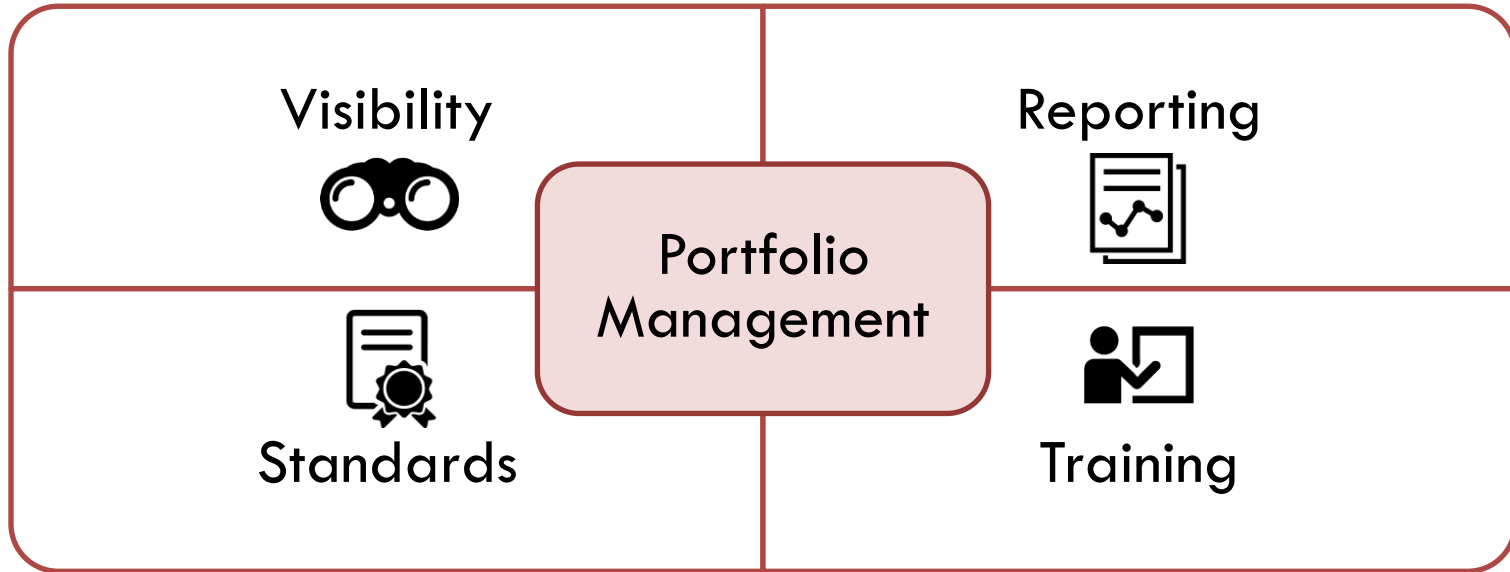
Overview

- Recap of Portfolio Management
- FY 2017-18 Q1 Performance
- Next Steps



Portfolio Management Purpose

To support strategic investment in technology.



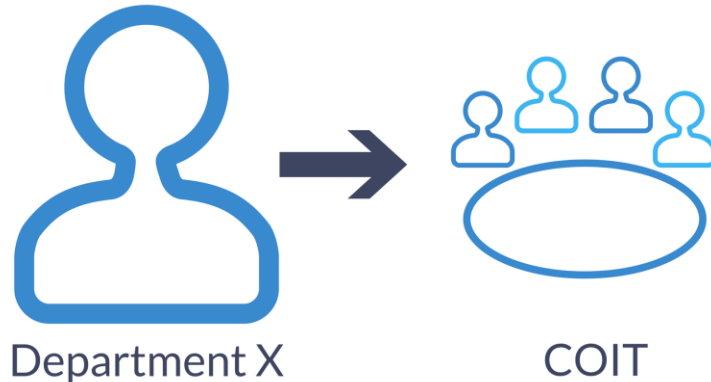
Objectives

- Reduce silos; investment overlap
- Continuous improvement
- Focus on Total Cost of Ownership and ROI



Portfolio Management Scenario

How to make better technology investment decisions when Department comes to COIT for a technology “X” to do service “Y”



Ideal Process

- Department involves DT for technical review
- COIT assesses project request under citywide landscape



Project



COIT



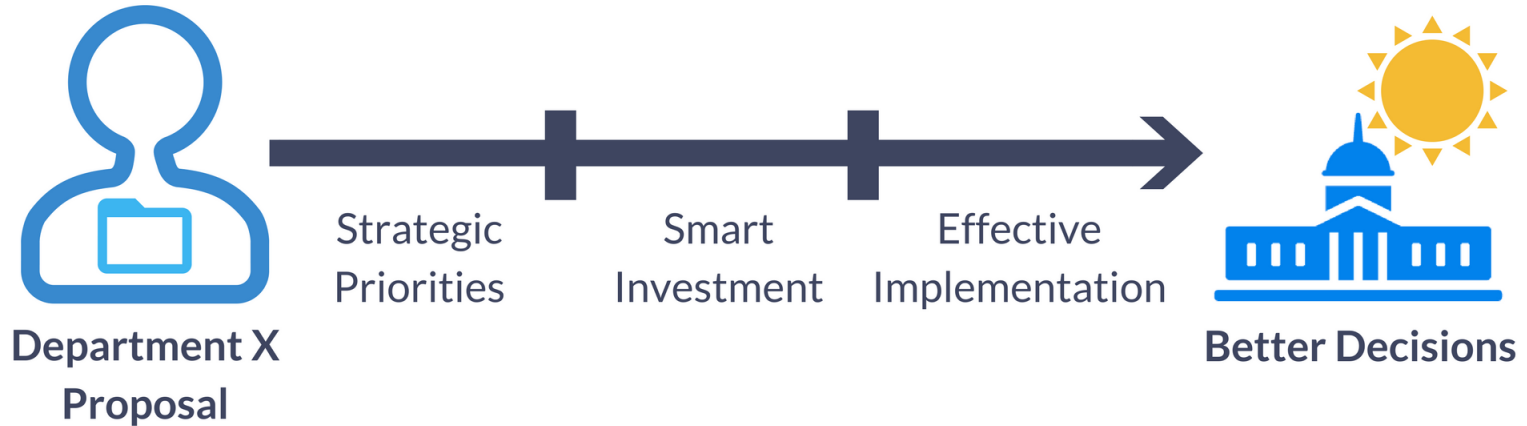
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COIT Strategic Questions

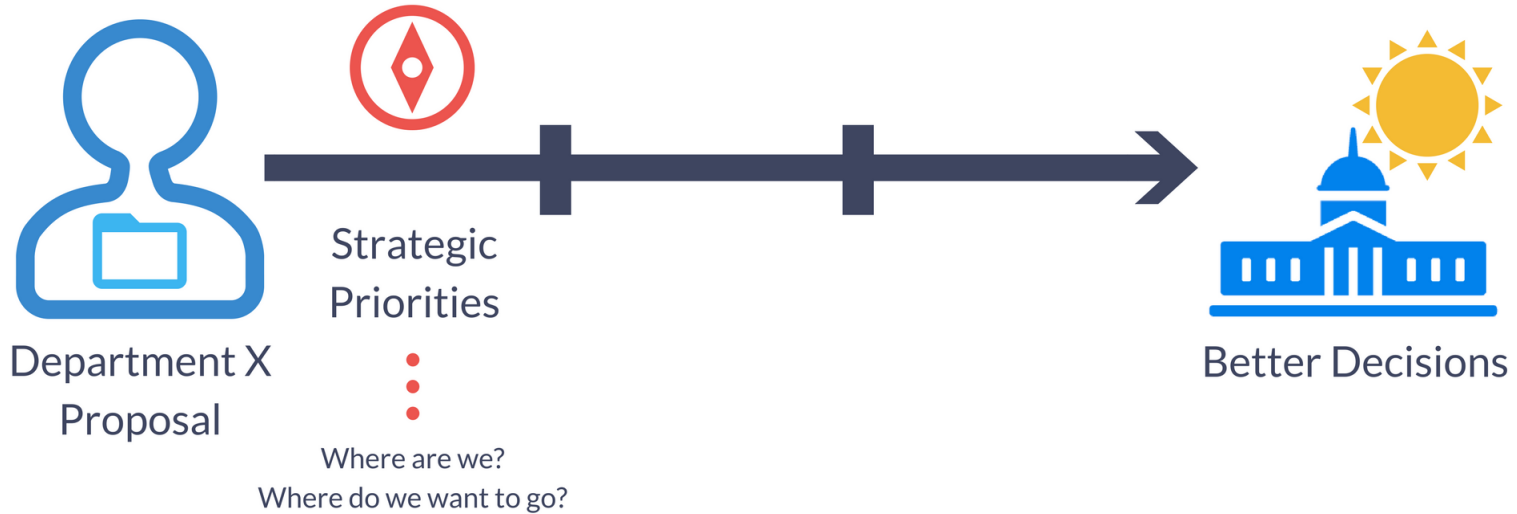
- Who else does service “Y”?
- What technology is out there?
- How much does the City already spend?
- Is there a bigger ask? Can others benefit?



From Proposal to Better Decisions



Step 1: Strategic Alignment



Step 2: Smart Investment



Department X
Proposal



Smart
Investment



How are we going
to get there?



Better Decisions

Step 3: Effective Implementation



Department X
Proposal



Effective
Implementation



What works?
What doesn't?



Better Decisions

Better Decisions



Early Service Example

- Track customer contact and service requests: customer relationship management (CRM)
- Manage appointments and calendars
- Analyze business data: Business Intelligence (BI)



Early Service Example

| Strategic Questions | CRM | Appointment/Calendar | BI |
|----------------------------|---|---|--|
| Departments | 11+ 311, ENV, MTA, OEWD | 8+ ADM, DPH, REC, WAR | 9+ AIR, ASR, CYF, CON |
| Technology Options | Constant Contact, Firmstep, Q-Matic, Raiser's Edge, Salesforce, SugarCRM, Verint | ACTIVE Net, Appointment Plus, Artifax, Drupal, FileMaker, Microsoft, Oracle, Siemens | Cisco, IBM, Informatica, Microsoft, Oracle, Tableau |
| Current Spending | ? | ? | ? |
| Others can Benefit? | Very Likely (5) | Likely (4) | Likely (4) |

Q1 Performance Update

Quarterly Performance Objectives

- Using Resources?
- Department at Capacity?
- Return on Investment



FY 2017-18 Q1

Source of Funded Projects

| Fiscal Year Funded | Number of General Fund Funded Projects | Number of Non-General Fund Funded Projects | Total |
|---------------------------|---|---|--------------|
| 2013-14 | 10 | 23 | 33 |
| 2014-15 | 9 | 16 | 25 |
| 2015-16 | 37 | 22 | 59 |
| 2016-17 | 25 | 19 | 42 |
| 2017-18 | 24 | 31 | 55 |
| Total | 105 | 109 | 214 |

FY 2017-18 Q1

Known Status of 189 Funded Projects

| Fiscal Year Funded | Not Started | Canceled | In Progress | Completed |
|--------------------|-------------|-----------|-------------|-----------|
| 2013-14 | 1 | 5 | 2 | 16 |
| 2014-15 | 0 | 1 | 7 | 15 |
| 2015-16 | 7 | 4 | 13 | 30 |
| 2016-17 | 1 | 1 | 25 | 10 |
| 2017-18 | 6 | 0 | 42 | 3 |
| Total | 15 | 11 | 89 | 74 |

FY 2017-18 Q1

Status of 99 General Fund Funded Projects

| Fiscal Year Funded | Not Started | Canceled | In Progress | Completed |
|--------------------|-------------|----------|-------------|-----------|
| 2013-14 | | 2 | 1 | 7 |
| 2014-15 | | | 3 | 5 |
| 2015-16 | 3 | 2 | 7 | 23 |
| 2016-17 | | 1 | 16 | 8 |
| 2017-18 | 4 | | 16 | 1 |
| Total | 7 | 5 | 43 | 44 |

FY 2017-18 Q1

Theme of Funded Projects

| Theme | In Progress | Total Projects |
|--|-------------|----------------|
| Asset Management | 2 | 12 |
| Collaborative Tools - Data sharing | 8 | 17 |
| Customer & Case Management | 8 | 22 |
| Digitization & Document/Records Management | 8 | 12 |
| General Operations | 14 | 32 |
| Infrastructure: Network & Data Centers | 22 | 65 |
| Major IT Project | 6 | 12 |
| Mobile Technology | 4 | 8 |
| Risk Management: Cybersecurity & Business Continuity | 8 | 16 |
| Website | 9 | 16 |
| Total | 89 | 214 |

FY 2017-18 Q1

Departments with unreported projects (25) this quarter:

- Academy of Sciences
- Homelessness and Supportive Housing
- Human Resources*
- Juvenile Probation*
- Municipal Transportation Agency
- Public Utilities Commission
- Sheriff*

*Departments with COIT GF-Funded projects



Next Steps

- Continue to build database
 - DataSF Systems Inventory timeline
 - Collect Q2 performance information
- Other deliverables
 - Quarterly Executive Summary
 - Department Profiles & Performance Dashboards

