



# COIT Budget & Performance Subcommittee

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Regular Meeting  
April 12, 2019

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

# Agenda

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- Call to Order by Chair
- Roll Call
- Approval of Meeting Minutes from March 29, 2019
- Budget Presentations: General Fund Departments
- FY 2019-20 & FY 2020-21 General Fund Budget Recommendations
- Public Comment
- Adjournment





Action Item

## 3. Approval of Minutes



# 4. Budget Presentations: General Fund Departments



Digital Services

# Citywide web project

April 2019

We are building a new citywide website that prioritizes the services that the city offers to residents

## Digital Services Strategy 2015 recommendation:

“The City should develop a common template and design guidelines to support a unified brand. The City should also continue to build a cross-departmental “one-stop” site that helps residents and visitors find the content and services they need.”

First version of the site has been live for six months and two big iterations

Second version will be publicly released in May

The screenshot shows the top portion of the City & County of San Francisco website. At the top left is the official seal and the text "CITY & COUNTY OF San Francisco". To the right are navigation links for "Services", "Departments", and "Elected Officials". Further right is a "Translate" button with a language icon. Below the navigation is a light blue banner with the text "City & County of San Francisco". A search bar with the placeholder text "What are you looking for?" is positioned below the banner, with a magnifying glass icon to its right. A yellow highlight box is placed over the search bar and the text "Now integrates with 311 search!". Below the search bar is a dark blue horizontal bar with the word "Services" in white. Underneath this bar, a list of services is displayed in two columns: "Pay property taxes", "Apply for affordable rental housing", "Register a new business", "Get a marriage license", "Pay business taxes", "Get a job with the City", "Get a San Francisco birth certificate", and "Get a safety escort to walk with you". At the bottom of the list is a green button labeled "View all services".

CITY & COUNTY OF  
**San Francisco**

Services Departments Elected Officials

Translate

**City & County of San Francisco**

Now integrates with 311 search!

What are you looking for?

**Services**

- Pay property taxes
- Apply for affordable rental housing
- Register a new business
- Get a marriage license
- Pay business taxes
- Get a job with the City
- Get a San Francisco birth certificate
- Get a safety escort to walk with you

View all services

## We have listened carefully to feedback

- 11 workshops with more than 75 department staff
- More than 30 presentations about the project with various groups
- Spoken and tested with more than 300 San Franciscans at libraries and community centers across the City

## New look and feel based on design principles

1. Represent the city's diversity
2. Celebrate our unique culture and progressive values
3. Be accessible and inclusive for all people
4. Reflect that the website is reliable and easy to use

## Homepage

City and County of San Francisco

Services

Elected Officials

Board of Supervisors

Elected Officers

This is a new website for San Francisco

## Department page

Mayor's Office of Housing and Community Development

Services

Affordable Housing Target

News

Events

Resources

About

Contact

## Info

Voting in School Board elections

More info info

What to consider when deciding to register

How to register

About Prop 53

## News

Mayor London Breed announces housing investments for very low-income seniors

Related news

## Transaction

Visit an inmate

What to do

Special cases

## Event

McLaren Community Garden Reopening Celebration

Related services

## Topics list

Services

Building	Business
Building	Building
Landmarks	Management and performance
Programs and services	Personal services
Reporting conditions	Safety
Topics	Topics

# Progress against milestones

## Done

Search

Service start pages

Topic pages

Department home pages

News and events

Look and feel

## Doing

Single sign-on for staff

Pattern library

Home page

## To-do

Transaction pages

Info pages

People info pages

Content editor for staff

Public meetings / papers

Analytics

SEO

There are currently 211 city websites, with more than 70,000 pages of content. All of them have a different look, feel, and navigation structure.

Of the City's 875 services, only 20% can be done online. Everything else is a phone call, in-person visit, or email.

More than just telling people how to get city services, the vision is to let people transact through one single City website.

# Most popular services:

Get married

File a police report

Report a homeless person who needs assistance

Get a permit to do construction work

Apply for affordable housing

Pay property tax

Have a car blocking your driveway towed

Request a hearing about an illegal rent increase or eviction

Get your towed car back

Get a parking permit

Pay a parking ticket

Pay business taxes

Register your business

## Digital Services has done several projects related to permitting:

1. All applications for a **Cannabis** license are done online through a consolidated application form.
2. Applicants to the **Legacy Business** program can now apply online using Digital Services' open source formbuilder to make custom online forms.
3. The SF **Business Portal** tells people how to start a business in the city and what permits they need.
4. The **ADU** permit process has now been fully mapped as-is and we are beginning to prototype a new approach.



SAN FRANCISCO OFFICE OF CANNABIS

# Apply for a cannabis business permit - Initial cannabis application

You will need about 2 hours to fill the Cannabis Business Permit Applicant (part 1).  
You can save and come back to this form using your Business Portal log in.  
Do not use your browser's 'BACK' button to navigate this application. Use the navigation buttons at the bottom of each page.

All uploads can be scans or photos from your smartphone, as long as we can read them.

If you are a non-Equity applicant, you will commit to paying the \$2,000 application fee per cannabis activity conducted at your location once you submit this form. Before submitting, make sure that your business [meets the application criteria](#).

This part of the application is based on location. You will need to submit an application for every address at which you are seeking cannabis permits.

For help with this application, email [officeofcannabis@sfgov.org](mailto:officeofcannabis@sfgov.org)

Start



[View a previous submission or resume a draft](#)

CONTACT EMAIL

[officeofcannabis@sfgov.org](mailto:officeofcannabis@sfgov.org)

SHARE THIS



What would it take to scale up and make all permits digital, using the website as the platform?

User experience design and testing, systems integration, data infrastructure, cybersecurity, payment compliance, and business process design are all needed to make this work.

Collaboration is the only way to succeed!

## Continue to build out SF.gov

- Significantly scale efforts to add service content across all departments
- Focus on additional content types like meetings, public bodies, and people
- Develop single sign-on and better editing experience for staff

## Build capacity to deliver on permitting

- Run pilots and proofs of concept
- Make 'building blocks' that can be easily pulled together to create new permit types quickly
- Take high priority permits first and work down the list in consultation with departments

An effort at this scale needs a bigger team.

# A typical product team

## Product Manager

- Keep the vision for the product and make sure it is followed
- Manage stakeholders
- Prioritize the work so that the team can keep moving
- Set and track metrics for success

## Content Designer

- Analyze all service content and re-write it
- Write the questions for the application form
- Write notifications that go to residents

## UX Designer

- Design the application form
- Design the flow of pages through the online process
- Test everything with users

## Service Designer

- User research
- With departments, map out the process (online and offline) for the user and staff
- Create a new service vision and business process, working with departments.

## Engineer

- Map data between systems
- Build APIs and integrations
- Implement technologies
- Ensure reliability

# Overall budget proposal

Increase Digital Services budget from \$7.6 million to \$10.4 million in FY 19-20 to fund overall team growth for priorities.

- Permitting \$5.4 million
- Website \$3.7 million
- Housing \$1.3 million

Team management costs are allocated across priorities

# COIT Request

Type	Item	Description	Cost
Project staff	Two 1053 UX Writers	Work with departments to write service content and help departments move to the new site; help departments with transactional services make beautiful online forms.	\$400,000
Professional services	Multi-language translation services	Human translation for all relevant web content in Chinese and Spanish.	\$150,000
	Drupal Development	Additional Drupal 8 development capacity, and capacity to assist with closedown of Drupal 7 sfgov.org	\$450,000
TOTAL			\$1,000,000

# Schedule

MILESTONE	DATES	DESCRIPTION
Staff editor experience	July - October 2019	Begin work on experience for content editors (staff) and complete Single Sign On with CISO
Hiring	July 2019	Fill new vacancies and onboard staff
Scale up content	September 2019 onward	Scale up efforts to get content onto the new site, working closely with departments
Permitting pilots	Now through October 2019	Pilot an online ADU permit experience Create more pilots based on prioritized list
Design and build for Public meetings and papers	October 2019 through December 2019	Use existing COIT template and do initial discovery around meetings and public bodies
Publish standards and guidelines	January – July 2020	Guidelines for departments on user experience design, service design, and best practices



# County Clerk –IT System Modernization

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Department: CAO/ GSA Office of the County Clerk  
Presenter: Rand Miyashiro, PMP

# County Clerk –IT System Modernization

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## Project Objectives

- Pursue an upgrade path with the current vendor to go-live on a new IT system before the legacy system sunsets in July 2020.
- Establish a new self-service platform to support public access via the internet while enhancing in-person services with the option of self-service kiosks.
- Increase staff efficiency and productivity by replacing paper processes with direct self-service online capabilities.



# Problem Definition

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<p>Current State</p>	<p><b>Current State-</b> The current County Clerk IT System will be retired by the vendor in June 2020. The Clerk has used the Atpac/Criis system for over 30 years; together with a third party scheduling system for marriage license and ceremony appointments. The system supports all high-volume transactions required for the office to carry out its state and local mandated legal functions.</p>
<p>Future State</p>	<p>The new Southtech/Granicus software suite is a turnkey system approved by the California Department of Public Health for FY 2020 and beyond. It will support new electronic payment with CityBase, offer greater on-line public access, and potential for new services such as passport services.</p>



# County Clerk –IT System Modernization

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## **Primary Users**

Residents, non-residents, San Francisco business owners, and County Clerk staff.

## **Major Stakeholders**

CA Secretary of State, CA Office of Vital Records, CCSF DT, CCSF Treasurer, CCSF Assessor-Recorder



# County Clerk –IT System Modernization

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## Primary Performance Measures

- Transition County Clerk operations to new system by June 30, 2020
- Transition County Clerk electronic payments to TTX approved vendor by June 30, 2020

# County Clerk –IT System Modernization

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## Recent Accomplishments

- Obtained sole source waiver from OCA
- Isolated needed enhancements for efficient processes
- Commenced vendor negotiation
- Secured City employee staffing and project space commitments for implementation, training, and go-live

# County Clerk –IT System Modernization

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<b>PHASE</b>	<b>DATES</b>	<b>DESCRIPTION</b>
Phase 1	6/19-7/20	Replace existing IT System with equivalent features and enhancements including on-line scheduling, languages, and e-payments
Phase 2	7/20-6/21	Additional on-line capabilities, additional languages not included in Phase 1
Phase 3	6/21-TBD	Further on-line capabilities, new services, e.g. passport applications

# County Clerk –IT System Modernization

<b>PROJECT BUDGET (Phase 1-2)</b>	<b>FY 2019-20</b>	<b>FY 2020-21</b>	<b>PROJECT Total</b>
Number of FTE	0-	0-	
FTE Classifications	0-	0-	
Salary & Fringe	0-	0-	
Software	273,608	0-	
Hardware	219,000	0-	
Professional Services	50,256	0-	
Materials & Supplies	0-	0-	
Contingency/Other	27,000	86,136	
<b>Total Project Cost</b>	<b>\$569,864</b>	<b>\$86,136</b>	<b>\$656,000</b>





# **5. FY 2019-20 & FY 2020-21 General Fund Budget Recommendations**



## 6. Public Comment