



City and County of San Francisco

Committee on Information Technology

Budget and Performance Subcommittee

Regular Meeting

November 04, 2022

Agenda

1. Call to Order by Chair
2. Roll Call
3. General Public Comment
4. Approval of the Consent Agenda
5. Department Updates and Announcements
6. Update to the 5 Year Information Communication Technology (ICT) Plan for FY2024- 2028
7. Review the COIT Budget Process for FY2023-2025
8. Adjournment

Item Number 3

General Public Comment

Item Number 4

Approval of the Consent Agenda

Action Item

Item Number 5

Department Updates and Announcements

Discussion

Item Number 6

Update to the 5 Year Information Communication Technology (ICT) Plan for FY2024- 2028

Discussion

Refresher...

What is the purpose of COIT's 5-Year ICT plan?

ICT Plan as defined in the Admin Code...

1. **Needs assessment** of the City's enterprise and general fund ICT capital and operating infrastructure
2. Estimate of **timelines and investments** required to meet these needs
3. **Recommendations to budget/finance** the investments
4. **Performance and financial reporting** on past investments

Or more succinctly...

The 5-year Plan is a chance to:

1. Refine the City's needs through value and goal-setting
2. Forecast the cost of projects meeting these needs
3. Recommend how to fund these projects
4. Report on our progress in achieving our goals

Calendar for Updating

October '22	<ul style="list-style-type: none">• Central agencies engagement on vision/goals [✓]• Begin engaging Departments about goals and project performance [✓; sending survey today]
November '22	<ul style="list-style-type: none">• Engage COIT BP on draft goals, project performance, and draft budget application for forecasting need [■]• Engage contributors to ICT Plan to begin writing plan (goals & project performance sections)
December '22	<ul style="list-style-type: none">• Engage COIT BP on revising funding recommendations & ICT plan outline• Continue ICT Plan writing, adding Financial Forecasts (MBO/CON) information• Launch budget application
January '23	<ul style="list-style-type: none">• Receive budget submissions & forecast cost of need• ICT plan outline presented for COIT feedback
February '23	<ul style="list-style-type: none">• COIT BP review draft ICT plan• Final draft submitted to COIT for approval

**Define the City's needs through
vision and goal-setting**

Revisited Vision/Goals with Central Agencies

- **Technology**
 - DT - Enterprise & Cybersecurity
 - Digital Services & DataSF
 - Civic Innovation
 - Digital Equity
- **Budget & Finance**
 - Controller
 - Mayor's Budget Office
- **Procurement - Office of Contract Administration**

FY 2022-2026 ICT Plan Guiding Vision

Government services that are available and universally accessible in times of crisis and beyond.

FY 2022-2026 ICT Plan Guiding Vision

Government services that are available and universally accessible in times of crisis and beyond.

No change suggested.

FY 2022-2026 ICT Goals

1. Online and Accessible City Services Residents Can Use
2. City Operations that are Efficient and Cost-Effective
3. IT Infrastructure You Can Trust

FY 2022-2026 ICT Goal

Goal 1: Online and Accessible City Services Residents Can Use

Transforming government means making services more accessible and easier to use. Redesigning our operations and innovating with new services is key to our modernization efforts.

DRAFT FY 2024-2028 ICT Goal

Goal 1 - Online and Accessible City Services Residents Can Use

Transforming government means making services more accessible and easier to use. Redesigning our operations and innovating with new services is key to our modernization efforts.

Examples of Recent or Upcoming Projects/ Standards

- Digital Accessibility & Inclusion Standard
- SF.gov platform
- Virtual public meetings with language selection

FY 2022-2026 ICT Goal

Goal 2 - City Operations that are Efficient and Cost-Effective

The onset of an economic recession has changed the financial picture for the coming years. Our technology solutions must continue to find ways to improve efficiency so that we can improve the quality of our services without increasing costs.

DRAFT FY 2024-2028 ICT Goal

Goal 2 - **Integrated City Operations that are Efficient, and Cost-Effective**

Given the slow pace of the City's economic recovery, our technology solutions must continue to **advance efficiency gains** that improve the quality of our services without increasing costs.

Examples of Recent or Upcoming Projects/ Standards

- Government Operations (HR, Procurement)
- Enterprise Applications & Shared Services
- DataSF Cross-Departmental Data Dashboards

FY 2022-2026 ICT Goal

Goal 3 - IT Infrastructure You Can Trust

Much like capital projects, technology infrastructure requires continual maintenance and investment to ensure critical systems are available at all times.

DRAFT FY 2024-2028 ICT Goal

Goal 3 - IT Infrastructure You Can Trust

Much like capital projects, technology infrastructure requires continual maintenance and investment to ensure critical systems are available at all times.

Example of Recent or Upcoming Projects/ Standards

- Data Centers & Network Resiliency
- Cybersecurity Disaster Recovery Standard
- Modern Computer-Aided Dispatch System (CAD)

Dept Survey

CIO / IT Manager Survey

CIO Survey for the City's 5 Year ICT Plan

COIT has officially begun development for the next iteration of the City's 5-Year [Information Communication Technology Plan](#), as required by the Administrative Code Sec. 22A.3. Each department is required to submit the following Department IT Plan Survey for fiscal years 2023-24 through 2027-28 to COIT by **November 15th**. Thank you and please reach out to Coit.Staff@sfgov.org with any questions or concerns.

* 1. Respondent Information

Department	<input type="text"/>
Division	<input type="text"/>
Job Title	<input type="text"/>

* 2. What are your IT Division's 3 biggest accomplishments over the past 18-24 months?

Accomplishment #1	<input type="text"/>
Accomplishment #2	<input type="text"/>
Accomplishment #3	<input type="text"/>

CIO / IT Manager Survey

* 3. What are the top 3 major IT initiatives your department will be focusing on in the next five years?

Major Initiative #1	<input type="text"/>
Major Initiative #2	<input type="text"/>
Major Initiative #3	<input type="text"/>

4. Which ICT Strategic Goal best aligns with each of your Department's major initiatives?

	Select relevant ICT Goal
Major Initiative #1	<input type="text"/>
Major Initiative #2	<input type="text"/>
Major Initiative #3	<input type="text"/>

If you selected none for one or more of the above, what revision would you suggest to the City's ICT goals to align with your major initiatives?

CIO / IT Manager Survey

5. Does your Department have any of the following General IT functions? (Check all that apply)

- Enterprise application - Service Now
- Enterprise application - Salesforce
- Enterprise application - GIS
- Help Desk
- Network support
- Database support
- Desktop maintenance
- Desktop patch management
- Server maintenance
- Server patch management
- Mobile device management

Draft ICT Plan Calendar - Detailed

October 2022	(10/17-11/4) Central agencies provide revisions to vision & goals
November 2022	(11/3-11/15) Depts surveyed on vision & goals, projects to highlight, and desired areas of improved Citywide collaboration
	(11/4) COIT BP revise budget app, give feedback on vision & goals & projects to highlight
	(11/17) COIT finalize vision and goals and give feedback on budget application (high-level)
	(11/21-1/27) Draft the ICT plan with contributors (Goals, Highlighted Projects, Areas for Collaboration)
December 2022	(12/4) Revise funding recommendations & give feedback on ICT plan outline
	(12/12-1/13) Budget application launched, submissions received
January 2023	(1/14) Projected cost of need incorporated into Draft ICT plan
	(1/19) COIT reviews outline of ICT plan & gives feedback
February 2023	(2/3) COIT BP review draft ICT Plan, give final feedback
	(2/16) COIT reviews and votes on ICT Plan

Thank you!

Item Number 7

Review the COIT Budget Process for FY23-25

Discussion

Budget Process Overview

Budget
Intake



January

Dept
Interviews



February/
March

Budget
Hearings



March/April

Final
Approval



May

Budget
Intake



Dept
Interviews



Budget
Hearings



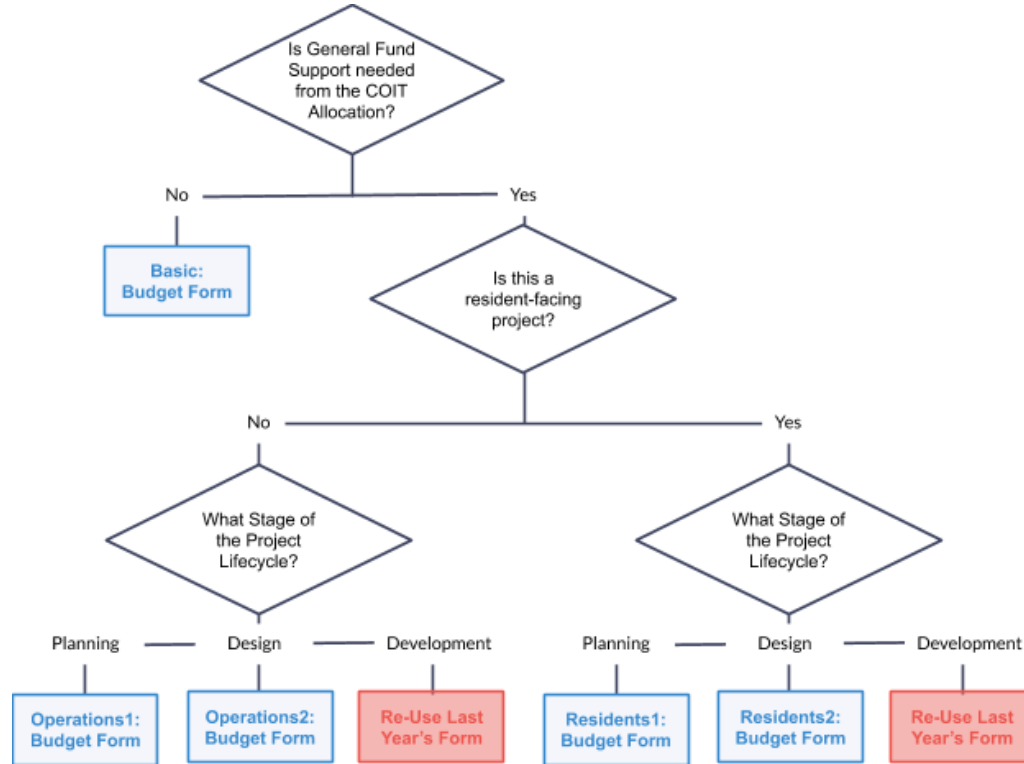
Final
Approval



January

- COIT Budget Proposals due mid January 20
- All projects over \$100,000
- All projects for next five years
- Budget Instructions also available in Mayor's Instructions

Budget Intake



Budget
Intake



Dept
Interviews



Budget
Hearings



Final
Approval



February - March

- COIT staff screens for:
 - › Project plan & application completeness
 - › Alignment with City's strategic goals
- Select projects may also receive a Technical Review from DT

FY 2022-23 & FY 2023-24 COIT Project Review Form

Criteria	Excellent Looks Like...
Problem Definition (User Research, Alternatives)	<p>User issues and journey well understood. Strong quantitative measures used to identify specific problems. Equity analysis incorporated in problem definition.</p> <p>Current state measures already being used to inform design.</p>
Strategic Alignment & Project Benefits (Strategic Priority, Quantifiable Impact)	<p>Strong alignment with Mayoral and Department priorities, including advancing City and Department equity goals.</p> <p>Project will transform service experience for users or administrators.</p>
Development Plan & Change Management (Role of the Business, Prototyping)	<p>Business processes mapped out, changes already taking place before technology solutions.</p> <p>CM is paired tightly with user-testing & feedback loops.</p>
Architecture Review (Data, Security)	<p>New solution architecture defines policies, procedures, new hardware, software and data components & integration to existing system and application components.</p> <p>Strong alignment to CCSF standards, policies and enterprise shared services models. Adequately addresses cybersecurity risk.</p>
Department Capacity (Planning, Staffing)	<p>Strong definition of roles and responsibilities between department staff and vendor. Staffed appropriately.</p> <p>Projects have been a model for implementation practices.</p>

Also consider Financial Match & Regulatory Considerations

Budget
Intake



Dept
Interviews



Budget
Hearings



Final
Approval



March - April

- COIT Budget & Performance Subcommittee
- A select number of projects with widespread impact will be asked to provide a 5-minute presentation.

NOTE: Presenting to the Subcommittee is not required to receive funding support, nor will all presenting projects receive funding.

Budget Presentations

Objective: Leverage Subcommittee Member expertise to promote better project outcomes.

- Problem Definition
- Project Risks
- Dependencies & Shared Lessons
- Funding Priorities

Budget
Intake



Dept
Interviews



Budget
Hearings



Final
Approval



May

- COIT to provide final review and approval.
- All recommendations sent to Mayor's Budget Office for possible inclusion in the Mayor's Budget.

Strategic Objectives for Portfolio Management

1

Focus on Users: Increase end user focus by encouraging user **testing, design thinking**, and where appropriate, **agile development** practices, for all COIT-funded projects.

2

Support Project Success: Help departments receiving COIT funding to build **risk mitigation** and **change management** plans into project design, including templates for **communication** and **coaching/training** plans.

3

Measure: Create **project dashboards** capturing **performance outcomes** and eventually **ROI** to demonstrate **impact** of COIT funds and inform future investments.

COIT Application Updates to Support Goals

1. Focus on Users

- Currently, questions on user testing and research only apply to projects that applicants indicate are resident-facing.
- **Recommendation:** Make such questions **applicable** to **all projects**. Indicate that COIT encourages user testing/research for projects that impact **City employees**, as well as residents.

2. Support Project Success

- **Recommendations:**
- Develop **templates** to help applicants create plans for risk mitigation and change management.
- Gather **input** from technology project management **SMEs**, as well as B&P.
- **Socialize** templates, gain buy-in, and prepare applicants to use in spring presentations to B&P.

3. Measure

- **Recommendations:**
- Ask applicants for funding what **output** or **outcome measures** they have that would be directly impacted by their project.
- COIT develop process for examining **cost reporting** to eventually develop measures of **ROI**.

Project Plan for Budget Process Update

Month	Key Date(s)	Nov	Dec	Jan	Feb	Mar
Application Form Update		█				
B&P, COIT Feedback	11/11 for B&P	█				
Form Goes Live	Target of 12/12		◆			
Project Success Templates		█				
Input: Tech Project SMEs	Nov – Early Jan		█			
B&P, COIT Feedback	12/2 & 2/4 B&P 1/17 COIT		█			
Socialize for Use in Dept Presentations	Feb –Mar				█	

Review PDF of Proposed Application Changes



Any Questions, Thoughts or Comments to Share?



Adjournment