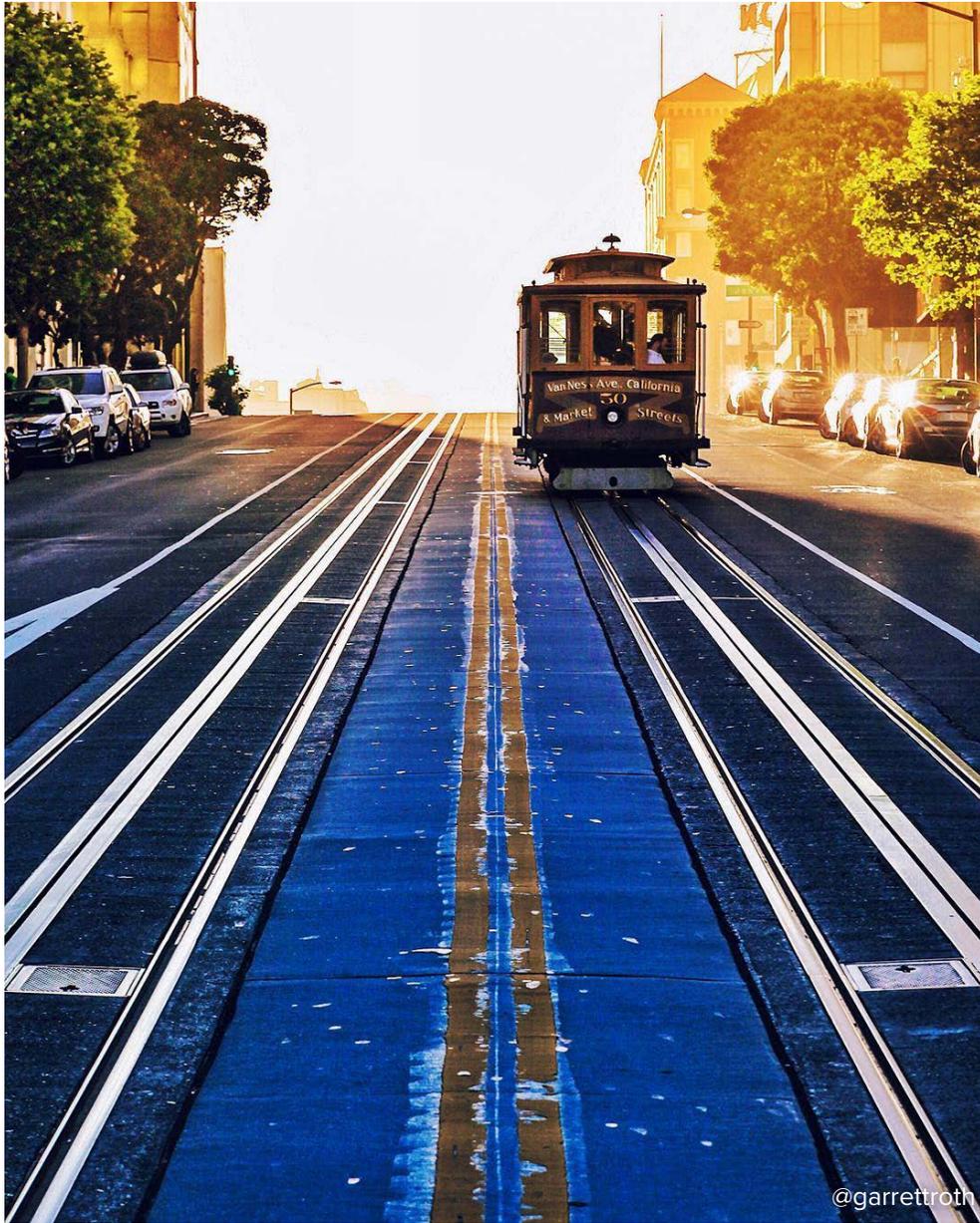


SAN FRANCISCO

DIGITAL SERVICES STRATEGY



Improving the Public Experience

Executive Sponsor:

Naomi Kelly, City Administrator

Working Group:

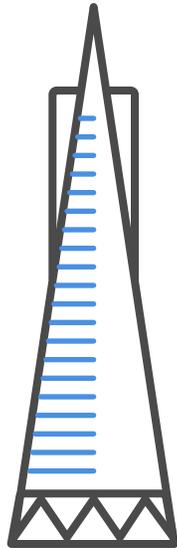
Committee on Information Technology | Mayor's Office of Civic Innovation
Mayor's Budget Office | DataSF | Department of Technology | 311

Contents

04	Executive Summary
08	Putting Our Principles Into Practice
10	Our Call To Action
14	Building A Path Forward
15	Embrace Modern Practices
17	Deliver Services Digitally
19	Share Resources To Build Modern Digital Services
21	Develop A Central Strategy With Strong Leadership & Governance
23	Leverage Existing Key Projects As The Foundations
28	San Francisco's Digital Services Roadmap
29	Recommendation 1 - Strong, Experienced Central Leadership
30	Recommendation 2 - A Modern, Expert Product Development Team
31	Recommendation 3 - Standardized Product Quality
33	Recommendation 4 - A Consistent City Brand & Experience
35	Recommendation 5 - New Strategy & Governance Body
36	Implementation Plan
39	Making Progress
41	Appendix A: Methodology
42	Appendix B: Digital Service Dictionary
46	Appendix C: Statistics
49	Appendix D: Interview & Workshop Materials

SAN FRANCISCO

DIGITAL SERVICES STRATEGY



Improving the Public Experience



@oscarwastaken

Executive Summary



More than ever before, residents now expect services to be available online. The development of new digital services is an opportunity to rethink how we deliver services to ensure every resident and visitor has the access they need. San Francisco's Digital Services Strategy promotes the development of new digital services to help improve the customer experience. Through comprehensive service redesign, the City seeks to streamline the customer service experience and make all services accessible and easy to use for everyone.

Core Values

The following values support our commitment to redesign the customer service experience:

Put Residents First: Resident needs should define the design of City services.

Digital By Default: Services should be delivered digitally whenever possible.

Integrated Service: Digital services should be managed by the core business, and not siloed in IT.

Build Expertise: The City should establish a team with modern skills and support an agile development culture.

Collaborative Process: Development of City service standards should be collaborative and contribute to a shared strategy.

San Francisco's Digital Services Roadmap

Five recommendations support the implementation of the City's strategic plan:



1 Strong, Experienced Central Leadership

Recommendation: The City should identify and empower a trusted leader to guide service redesign efforts. A dedicated, experienced thought leader will be a change-agent who drives a culture shift towards user-centered thinking and brings a modern approach to the development of digital products. The senior leader should have a service design vision and deep experience as both a manager and a technologist building consumer-oriented web products at scale.

2 A Modern Expert Product Development Team

Recommendation: The City should pursue a shared services model to support service redesign efforts across the City. The Digital Services Team will be responsible for redesigning services, building new products, and working alongside the departments.

The Team will be composed of the Digital Services Officer, designers, developers, product managers, analysts, and content strategists. The Team will also help create citywide standards and guidelines and will continue to refine the Digital Services Strategy.

3 Standardized Product Quality Oversight

Recommendation: The City should adopt modern, user-centered design methods for the development of all services. From production to the ongoing maintenance, the City should implement standard approaches to the design and delivery of services, specifically in the following areas:

User Testing

Data Services

Accessibility, Content, & Language

Procurement & Vendor Management

4 A Consistent City Brand & Experience

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

5 New Strategy & Governance Body

Recommendation: A central governing body is needed to manage the ongoing strategy and to approve standards. A working group of digital service experts should be formed to promote collaboration and develop common standards.



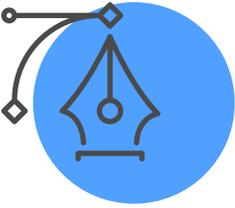
The Next Steps

Realizing our vision to create more intuitive and accessible services will require systematic redesign and a culture change in our day-to-day practices. Following the recommendations above, the Digital Services Team should make significant progress in improving how the City delivers services in the next year.



@philpham

Putting Our Principles Into Practice



Dedicated To Service

Imagine a city where a teenager in the Bayview could log on and search for a summer internship from his cell phone, allowing him to gain valuable job training for a future career. Or a family in the Mission could apply for affordable housing from a computer at their local library. Or even an aspiring café owner could apply for and track every permit for her business online on a City website.

Digital services can make each of these scenarios a reality. Rebuilding a service to include a digital option means City services are more open and accessible. Service redesign means meeting the needs of every resident and visitor by continually improving the service experience. Ultimately, better City services means building a more trusting relationship between the City and residents.

San Francisco's Digital Services Strategy is a commitment to promote the development of new digital services that improve the customer experience and makes services more accessible. This strategic document promotes best practices for the development of digital services and makes key recommendations to modernize the City's service culture. The Strategy also includes specific deliverables that should be achieved over the next year.

In order to make all services accessible and easy to use, the Digital Services Strategy aims to initiate a culture shift towards user-designed services. Through comprehensive service redesign, the City seeks to streamline the customer service experience.



@ournextstop

Our Call to Action



Now is the time!

To reshape our service delivery practices, we need to better understand where we are right now and what residents and visitors need. Our journey began by realizing digital services are no longer a luxury but a required part of modern service delivery.

Residents Have New Expectations

More than ever before, residents expect services to be available online. San Francisco's location in the heart of Silicon Valley only adds to the expectation for elegant digital services.

In this new reality, the City's website has become the front door to the City and County of San Francisco. In the last year alone, San Francisco's sfgov.org website has had over 20 million unique page views. City websites are now the first place to look for information and services.

The increasing demand for digital services means now is the time to improve our service delivery strategies to meet the needs of residents.

A Proven Path Already Exists

San Francisco has the benefit of learning from others to accomplish our goals. In the private sector, countless examples are available on how to build modern digital products. As we are all accustomed to, going online is the easiest and most convenient way to order a pair of shoes or buy a plane ticket.

Governments across the world are also starting to follow these practices. Momentum is building in the government technology sector to transform business-as-usual into service delivery practices that are more efficient and accessible. Some of the most prominent examples include:

United Kingdom Government Digital Service (GDS) is a systemwide effort to consolidate all government digital services under a single identity. All government websites and digital products are standardized to be as accessible as possible.

Federal Government United States Digital Services (USDS) and 18F are recent efforts that started following the near collapse of the Affordable Care Act's health care website. After fixing healthcare.gov, a new group of technology experts are helping improve digital services throughout the Federal agencies.

These leading examples are reshaping the way governments serve the public.

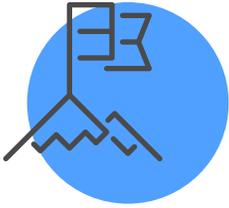
Deeper Look: The United Kingdom's Transformation



In 2011, the United Kingdom created the new office of the Government Digital Service (GDS) to implement a “Digital by Default” service strategy. Behind the simple premise that digital services are more accessible and more efficient to deliver, the United Kingdom underwent a systemwide transformation to standardize and unify their web products.

Since work has begun, GDS has created a new central portal in GOV.UK. A central team helped migrate agency websites and redesign digital services to better meet user needs. A recent GDS blog post best describes the monumental effort and achievements made over the last two years: 300+ websites to 1 in 15 months.

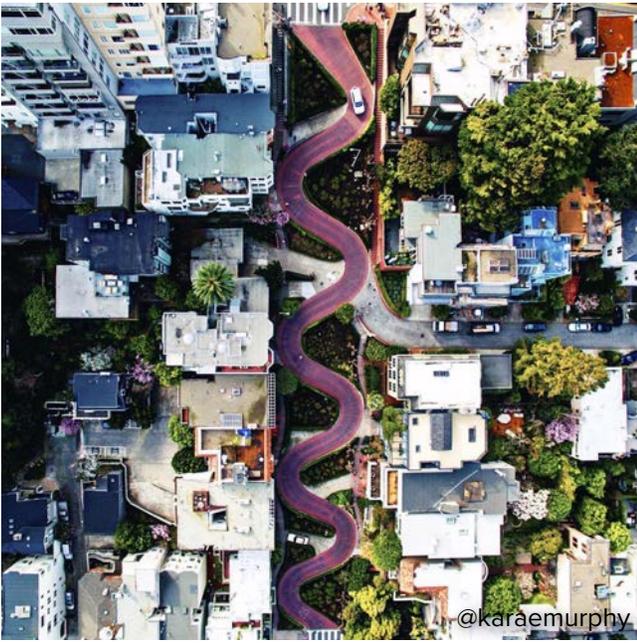
GDS follows a strict model that standardizes all websites and services under a single template. For consumers, the GDS model has the advantage of being the same no matter what service they need. To learn more about GDS and their work, please visit their blog at [Inside GOV.UK](#)



Opportunity In San Francisco

Compounding our call to action is the current state of our service delivery practices. Currently, the City organizes services by department and by major service areas. However, for residents and visitors to San Francisco, this division of labor is confusing and often irrelevant.

For digital products, this is especially problematic. A City's website is the first place residents and visitors will go to find information. Yet, San Francisco City Departments currently have over 50 domain names, more than 27 website designs, and many unreadable URLs. Further, by organizing services by departments, the City may push customers to multiple websites just to find a single service. As a unified entity, City websites do not provide the service experience residents need.



@karaemurphy



@kylelegg



@lukesbeard



@brillmatic

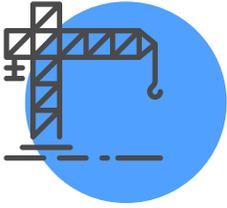


@zeekyan



@misslexy76

Building a Path Forward



To improve our services to be more accessible and intuitive for everyone, we will have change how the government thinks about service delivery. The following values are guiding our efforts to build a City that offers modern services.

Put Residents First: Resident needs should define the design of City services.

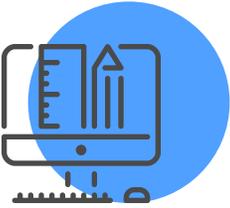
Digital By Default: Services should be delivered digitally whenever possible.

Integrated Service: Digital services should be managed by the core business, and not siloed in IT.

Build Expertise: The City should establish a team with modern skills and support an agile development culture.

Collaborative Process: Development of City service standards should be collaborative and contribute to a shared strategy.

Embrace Modern Practices



The City and County of San Francisco is responsible for delivering thousands of different services. As a consequence, City services come in all shapes and sizes with a multitude of service delivery strategies.

Although some departments have the resources to build modern digital services, many others are unable to follow best practices. The City needs to build a supportive structure that ensures all digital products maintain a high standard of excellence.

Two values guide our effort to improve the design of our services:

Put Residents First: Resident needs should define the design of City services.

Integrated Service: Digital services should be managed by the core business, and not siloed in IT.

The Digital Toolkit

Putting these values into practice means creating a common standard for service delivery. The City should incorporate the following elements into the design and support of all services:

User Research is fundamental to understanding each customer's story and their needs. To build accessible and intuitive services, this information is essential.

Data Analysis is the foundation of an iterative design process. To achieve world class service delivery, data must drive learning and adaptation.

Skilled Staff are required to build an ongoing process of improvement. IT staff must work hand-in-hand with the business to meet customer needs.

Modern Tools are needed to support the production and maintenance of digital products, with the flexibility to test and adapt as needed.

Integrating these simple elements into the development of a digital service can have profound effects on a service's non-digital elements. Both brick-and-mortar and phone services are often impacted by providing a digital option. What's more, providing a digital option is often times more cost-efficient, saving both the customer and government money.

Deeper Look: Fixing Healthcare.gov



In 2010, President Obama signed the Affordable Care Act. Central to the implementation of the legislation was the creation of Healthcare.gov to provide insurance to millions of Americans.

Unfortunately, when the website was launched in 2013, technological problems marred the release. The government’s methods to build and design the website were out-dated and inappropriate for a modern technology project, putting the entire program at risk.

Faced with a technological threat to his signature policy initiative, President Obama shifted strategies. Recruiting a small number of technologists from some of the country’s most prominent companies, a team of developers worked to fix Healthcare.gov. Their effort led to the website’s modern deployment that is both user-friendly and able to meet the needs of all consumers.

The success of a small team of developers using modern practices started a transformation in the Federal government. Their success led to the creation of the United States Digital Services (USDS) to help other agencies build modern digital products.

The efficiencies and cost-savings proven from the healthcare.gov example is an example of what is possible when modern practices are used in government.*

	Cost to Build (millions)	Cost to Maintain (millions)
Old Methods	\$250	\$70
Agile Development	\$4	\$1
Savings	<hr/> \$246	<hr/> \$69

*“The Secret Startup That Saved the Worst Website in America.” The Atlantic. Atlantic Media Company. 2015. <http://www.theatlantic.com/technology/archive/2015/07/the-secret-startup-saved-healthcare-gov-the-worst-website-in-america/397784/>

Deliver Services Digitally



City services should always provide a digital option and all services must be designed by incorporating the needs of residents and visitors first. Our guiding value for the future of City services is:

Digital by Default: Services should be delivered digitally whenever possible.

The future design and development of services should consider the following elements.

Redesign Service from the Ground Up

Building digital options for City services is an opportunity to not only make services accessible online, but to rethink how we provide a service experience. However, the City should be careful and not just create a digital version of a bad process. Rebuilding a service to include a digital option allows us to question and redesign the steps and requirements of each service in an ultimate effort to streamline the customer experience.

Migrate Paper to Digital

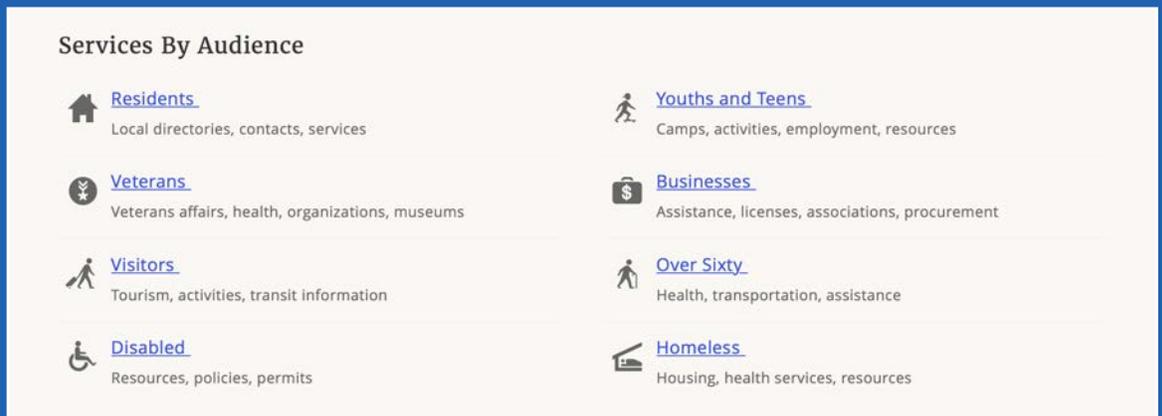
The opportunity to build digital services means more than building new websites. The creation of a truly supportive service strategy also means replacing inefficient services, like anything that relies on paper.

Building a digital option is a key part of increasing accessibility. Requiring forms to be filled out in person or to send them through the mail is cumbersome and too time-intensive for many residents. Wherever legal or other obligations do not require paper, making a service available online means providing an alternative service channel that is easier to access.

Create Digital Front Doors

The City should seek to build one-stop sites that bring related services together in one location. Our homepage on sfgov.org should contribute to this goal and be designed as the first stop for all residents and visitors. When coming to our websites, consumers should be able to find the information or the service they want quickly and easily.

Deeper Look: A Digital Front Door



There are many great examples of City websites changing their front page to help their residents get services quickly and easily. The City of St. Louis recently engaged in a project to redesign their websites to better meet user needs. Key to their redesign effort: bringing services to the front page.

St. Louis is also pioneering a way to connect specific audiences to services. Through their front page, visitors can access the services they want immediately.

Share Resources



The City needs skilled staff to build and maintain digital products. However, the key positions needed to do the work either do not exist or are spread too thinly throughout the City.

The Department of Technology (DT) has staff already dedicated to helping departments build digital products. In addition to maintaining many City websites, DT helps develop web services and digital applications. Unfortunately, the department is insufficiently resourced to meet the increasing demand, leading to an increased use of outside contractors.

As a guiding value, the City needs increased support for the development of digital services.

Build Expertise: The City should establish a team with modern skills and support an agile development culture.

In practice, a team of digital experts will help create a service culture that prioritizes user needs and builds capacity to manage digital services within the City.

The Components of a Shared Service

Creating a team that helps build accessible and intuitive digital services will require rethinking how the City is organized and how it is staffed. Meeting the needs of every resident and visitor means making sure small departments are able to deliver the same standard of digital services as large departments. To accomplish this goal, the City must share resources.

A central team must be able to:

Build web services and digital applications. These products should use modern practices to meet the needs of consumers.

Maintain digital products so that they continue to operate as expected and are in a constant state of improvement.

Consult with other staff and departments to share best practices and advise on the development of new products to align with the City's new Digital Services Strategy.

A shared service staffing model is the most efficient way to build new digital products.

Deeper Look: Improving Tech Hiring

The City and County of San Francisco is the largest employer in the city with about 32,000 employees. City technologists tackle everything from making sure police and firefighters can communicate when the air is blazing with smoke and alarms, to ensuring emergency room doctors get critical patient records.

Against the backdrop of full employment and fierce competition with some of the world's top technology companies, the City is positioning itself as an employer of choice for top tech talent. The Department of Human Resources (DHR) has partnered with the Department of Technology (DT) and other City departments to develop the TechHire program. Research conducted as part of this program showed that across all demographics, today's technologists are really looking for meaningful work. And more than anything, the City can offer purpose.

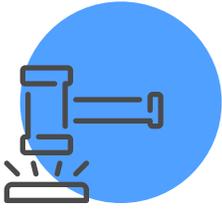
The TechHire program pairs a marketing campaign with changes to the City's hiring practices that will improve its ability to hire and retain top tech talent. By delivering a more efficient hiring process, moving to a competency-based hiring model, and providing additional hiring options, joining the City will be quicker and more efficient than ever.

One new model DHR has proposed to use to hire permanent civil service positions is called FlexSelect. FlexSelect is based on the recent nurse hiring model that took hiring time from 193 to 40 days. By using continuous eligible lists in IT engineer classifications and by specialty area, hiring managers are enabled to quickly and efficiently identify highly qualified candidates.

Over the next year, the City's Department of Human Resources will provide updates on the progress of TechHire through monthly video presentations, human resources professionals meetings, and forums through their site at:

http://dhrportal.org/wp-content/uploads/flash_files/Tech_Hiring/

Strong Leadership and Governance



Ultimately, the inconsistencies between City digital services are largely due to the lack of a unified citywide strategy. Departments build and design their services to meet the needs of their customers, often without reference to other departments or other similar services. But as demand for more digital services grows, the City has an opportunity to create a more unified service experience and to leverage and scale its investments.

A guiding value is to build a consistent service experience by improving cross departmental collaboration.

Collaborative Process: Development of City service standards should be collaborative and contribute to a shared strategy.

The unification of service delivery practices under a larger service strategy will contribute to the development of a streamlined customer experience.

Benefits of a Central Digital Strategy

Among the most helpful elements of a citywide service strategy is to help organize and coordinate San Francisco's digital presence. Other benefits include:

Prioritize the development of digital products. Many City services need new digital interfaces to be built from the ground up. A strategy can help prioritize the development or redesign of services with the most impact.

Share Best Practices. City staff must constantly learn the most effective methods to build and maintain digital products. Standards can help support best practices.

Develop a City Brand. Departments will have to agree to follow common service elements to create a consistent service experience. A citywide strategy helps articulate the governance process to agree on citywide standards.

The development of a central strategy is a fundamental component to improving the City's service experience.

In addition to a citywide digital strategy, departments should also engage in their own strategy development to better meet the needs of their individual users. Department-specific strategies should be encouraged to rethink their service designs and re-analyze their customer's needs.

Deeper Look: HSA Digital Strategy Report

The Human Services Agency (HSA) is currently implementing a digital strategy that promises to transform its relationship with residents across San Francisco.

The San Francisco Human Services Agency is a lifeline for 23% of San Franciscans, serving over 200,000 unique persons seeking essential social services. HSA helps residents find pathways to self-sufficiency through welfare-to-work services, food (CalFresh), medical care (Medi-Cal), and child-care assistance programs, among others. HSA services also help veterans, the homeless, and those experiencing abuse or who are homebound.

HSA's Digital Strategy is an effort to improve service delivery, strengthening its relationship with the community. By rethinking how to design services, HSA is finding new ways to better assist San Francisco residents.

The Agency has been approaching the rebuild of its website in three phases.

Phase 1 was to research the current landscape of how clients, community partners and employees currently experience the website. Google Analytics and Google Webmaster provided vital data of how people were using SFHSA.org and on what sort of devices.

Phase 2 is about creating and implementing an effective content strategy: deciding what content stays or goes, making all content accessible from the users' perspectives, and then creating an internal Agency process to sustain relevant and accessible content.

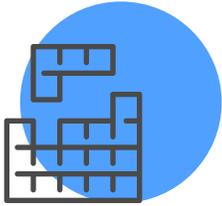
Phase 3 is about transactions or service delivery by enabling HSA and website users to exchange information and documentation.

An "Agile" approach will be used through a process of quick, repetitive, cycles of finding people's pain points with the website, making changes, and getting feedback.

To read more about HSA's digital strategy, see here:

<http://exygy-design.github.io/hsa-docs/>

Leverage Existing Key Projects



San Francisco’s path forward is clear. To meet the needs of residents and visitors, more digital products need to be developed. By rethinking how to put residents and visitors first, the City can provide world-class services.

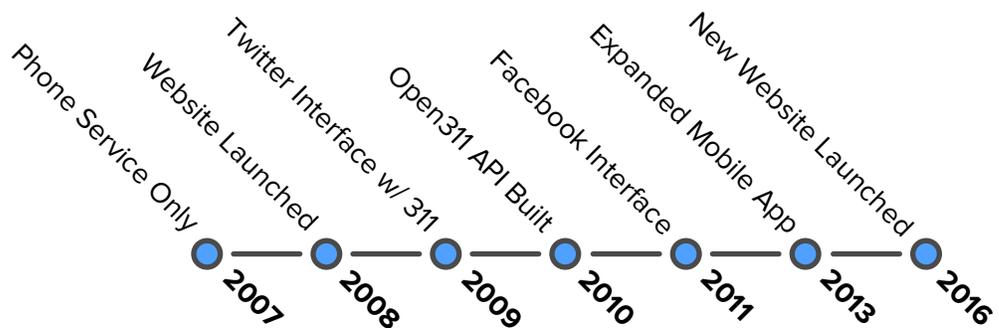
Several projects are already paving the way forward. Innovative digital services are being developed across the City, exhibiting the very values wanted in our citywide digital strategy. Among the most prominent are:

SF311: San Francisco Customer Service Center

The SF311 center provides an easy-to-remember telephone number that connects residents, businesses, and visitors to Customer Service Representatives ready to help with general government information and services. The easiest way to obtain information, report problems, or submit service requests to the City is through one of the many 311 contact channels.

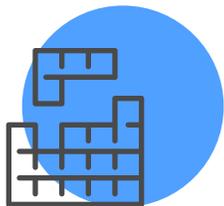
SF311 maintains a comprehensive knowledge base of City services and works cooperatively with all departments to understand the department service offerings. SF311 has focused continually on simplifying processes, digitizing them when able, and allowing the public to reach the City through an expanding range of contact options.

Over the years, SF311 increased the options to help customers. Now residents and visitors have the option to contact SF311 through multiple channels.



With multiple options, analysis shows that the public is increasingly using digital channels to request City services. For example in 2015, 311 received a total 325,436 requests from residents and visitors, with 50% coming from Web and mobile options.

SF311 continues to focus on the customer experience with recently launched website that allows for user accounts, an improved search, and simplified service request management.



San Francisco Business Portal

The San Francisco Business Portal provides a user-focused approach to providing government services to small business owners. Under the leadership of San Francisco Mayor Lee, the Business Portal team partnered with the Department of Technology (DT) and the Office of Economic and Workforce Development to conduct extensive user experience research with local business owners. The Business Portal is now home to over 400 permits with a responsive design that allows easy access across devices.

Analytics and customer feedback now inform decisions related to improving the Portal and its future digital offerings. The Business Portal now receives approximately 4,000 users per month, a measure that is 13 times more than the City's previous permitting information site. Approximately 61% of users are over the age of 35, and mobile users make up 10% of the total.

The San Francisco Business Portal continues to improve by taking an iterative approach to new features. The next phases of the Portal will continue to simplify the experience of starting and managing a business.

The Business Portal is a model on how to deliver government services digitally and how every city agency should interact with its citizens. In the years since initial development, the Business Portal has inspired the creation of several other one-stop digital products, including a portal for affordable housing and the Jobs Portal.

Assessor-Recorder Office Website Redesign

Last year, the Assessor-Recorder's Office launched a major redesign of its public website to better serve San Francisco's taxpayers and residents. The site was created to feature new customer service content, better navigation, improved search functionality, and accessibility for desktop and mobile users. Recognizing the need for its website to reach a much broader audience and make service delivery easier, the Assessor-Recorder transformed how her office virtually connects with the public.

The office began with analyzing its customers' needs, frequently asked questions and common requests for information. To serve all taxpayers who work and live in San Francisco, as well as business owners, it was vital that the website provided relevant information that was easier to find and clearer explanations of technical, legal language. While a large part of the Assessor's work still relies on paper processes, its website now helps customers get the information they need more efficiently.

The Assessor-Recorder's Office developed its website through a collaborative, data-driven process involving stakeholders and customers. To maintain the site, the Assessor's staff is dedicated to an ongoing process to update and improve the content. Staff analyzes customer questions and legal changes to update its website content and provide information in a more intuitive manner. By re-evaluating who their users are and what information they want, the Assessor's Office was able to develop an excellent example of what City websites can provide.

Deeper Look: Innovative New Practices

In December 2015, the Department of Technology (DT) began piloting a new approach to client service delivery for a new digital service for the Office of Short-Term Rentals (OSTR), which regulates hosts on AirBnB and similar platforms. OSTR urgently needed a web presence and digital services with a rapidly approaching legislative deadline that required citizens to report short-term rentals. Using a team of three people, DT designed and launched a “digital by default” service in less than 20 business days that achieved 95% user adoption.

The project approach became known in DT as “Skunkworks”. A skunkworks project is a widely used term in business, engineering, and technical fields to describe a group within an organization tasked with working on advanced projects with a high degree of autonomy and unhampered by bureaucracy.

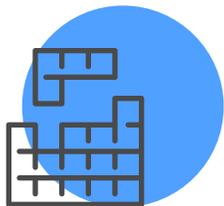
Key aspects of Skunkworks put into play that modernized the department’s approach to product delivery:

Cross-divisional and cross-functional team

Autonomous work separated from normal duties, focused on the one project

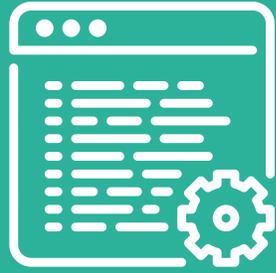
Deep client involvement

User-centered design

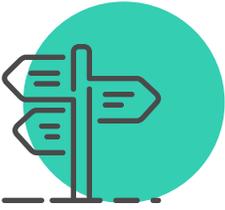


Building on Success

In the coming years, the City should expand on these innovative projects. Building a citywide service experience will depend on the coordination of service focal points like the ones listed above. As the City makes major changes to our web infrastructure, like our transition to a new content management system on Drupal, we should leverage these lessons to realize the goals of the City's digital strategy.



San Francisco's Digital Services Roadmap



Realizing our vision to create more intuitive and accessible services will require systematic redesign and a culture change in our day-to-day practices. Over the next several years, the City will begin a process to redesign our services to better meet the needs of the public.

To support the strategic redesign of City services and to execute an implementation plan, the Digital Services Strategy makes 5 key recommendations with related deliverables to achieve in the next year:

- 1 Strong, Experienced Central Leadership
- 2 A Modern Expert Product Development Team
- 3 Standardized Product Quality Oversight
- 4 A Consistent City Brand & Experience
- 5 New Strategy & Governance Body



1 Strong, Experienced Central Leadership

The goal of the Digital Services Strategy is to change how the City designs and delivers services. Technical and cultural shifts are required if we are to be successful. As we chart our path forward, a leader is needed to work across City departments to support the creation of intuitive and accessible services.

Recommendation: San Francisco needs an empowered, trusted leader to implement the strategy and guide our service redesign efforts. A dedicated, experienced thought-leader will be a change-agent who drives a culture shift towards user-centered thinking and brings a modern technology approach to digital products at the City.

The Digital Services Officer will be responsible for implementing the Digital Services Strategy and building the Digital Services Team. He/She will be the lead technical architect to the City's approach for digital product engineering. The Officer will need to work with departments to build a City brand and help design the technical standards to support it. But most importantly, the Officer will continue to build San Francisco's Digital Strategy to meet the changing needs of all residents and visitors to San Francisco.

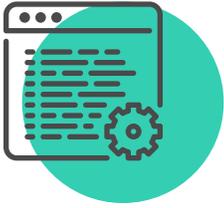
We recommend that the Digital Services Officer be someone who has experience as:

- A visionary leader, able to chart a path forward towards better service design.
- A technologist, with experience building consumer-oriented web products at scale.
- A team player, who emphasizes collaboration and communication in management.

Major Deliverables:

- Build the City's Digital Services Team, including recruitment and training.
- Develop digital standards including technical, design, accessibility standards.
- Create an inventory of City services and prioritize services to redesign.
- Develop service network to initiate a citywide service transformation.
- Collaborate with department leadership to set their digital service strategies.
- Lead all Digital Services Strategy efforts across the City.

2 A Modern, Expert Product Development Team



We need the right people to deliver excellent services. The City's Digital Services Team will be responsible for building better digital products, working more effectively with vendors, and advising departments as they modernize their approach to digital delivery. The Digital Services Officer will build this team using existing staff resources and by recruiting technologists.

Recommendation: The City should pursue a shared services model to support service redesign efforts across the City. A Digital Services Team will be responsible for redesigning services, building new products, and working alongside the departments.

A small team is needed to begin initial work on the Digital Services Strategy. The team will be composed of the Digital Services Officer, product managers, designers, business analysts, developers, and content strategists. All staff will help build standards and guidelines to promote best practices.

The following staff composition is recommended to achieve key strategic goals.

Project Managers: Coordinates service redesign. Incorporates user feedback and designs the service experience.

Designers: Leads user research, produce prototypes and designs, and iteratively improves the service experience.

Business Analysts: Helps map the business process and conduct user testing.

Developers: Builds digital products and supports data integration between services.

Content Strategists: Works with departments to lead a comprehensive overhaul of web content.

Major Deliverables:

- Develop short-term training plan for existing staff and onboarding for any new hires.
- Support professional development through training and guidebooks for City staff.
- Develop a standard toolkit, including computers, software, application stack.
- Build a service catalog to offer consulting and product development services to customer City departments.



3 Standardized Product Quality Oversight

For residents and visitors, the government is a single entity and the City service experience should reflect this expectation. City services should provide a consistent standard of service that meets the needs of all users, both on digital platforms and all others.

Recommendation: The City should adopt modern, user-centered design and development methods for the development of all services. From production to the ongoing maintenance, the City should develop and implement standard approaches to the design and delivery of services.

Standards and tools need to be developed in four main areas:

User Testing

In order to build products that meet the needs of residents and visitors, the City needs to better understand each individual. Throughout the production of new services, staff should test and elicit feedback from the public. By utilizing user-testing best practices and incorporating iterative design principles, we can create services that are much more likely to meet the needs of everyone.

The City needs a standard set of practices to test new products. Establishing models for departments to conduct user-testing is a foundational need and promotes the development of performance metrics to continually improve a service.

Deliverables:

- Develop user-testing platform to test new digital products.
- Create standard feedback mechanisms for all City services.

Accessibility, Content, and Language Standards

Content and language standards support the City's desire to assist the entire San Francisco community. The City needs to establish standards to ensure website content and the services themselves are accessible to everyone.

The Department of Technology (DT) already maintains strong accessibility standards for websites they maintain, but standards are still needed for many other City websites. In the coming years, all departments will also need to adopt accessibility standards and build processes to maintain them. Through close collaboration with staff, the City can build a common experience that is intuitive and accessible.

Deliverables:

- Develop accessibility, language, and content quality standards.
- Rewrite City website content.



Data Services

Data integration is an integral part of our digital services strategy. To coordinate a service experience, the City needs to continually analyze data across the City.

The Digital Services Team should partner with DataSF to develop a set of data services and a common architecture. To improve data consistency and quality, the City needs to develop a suite of data services, including reusable components, supporting data infrastructure, and architecture.

Deliverables:

- Develop data standards, data models, assessment and monitoring, and training with a consistent methodology.
- Develop data validation and data quality services.

Procurement and Vendor Management

City departments also need increased support when contracting with outside vendors. Consultants are a valuable resource when building specific products and often have very specific expertise not easily obtained. When building new services, the City needs to better manage vendors to spend money efficiently and to make sure the product is exactly what the consumer needs.

The Digital Services Team should act as a resource to help manage contractors. The Team should help department develop project requirements and establish quality and accessibility standards for vendors.

Deliverables:

- Support departments in selecting vendors.
- Support departments to develop project requirements.
- Help develop a vendor pool to help departments easily find a vendor that practices Digital Strategy principles.

4 A Consistent City Brand & Experience



The visual design of City websites is an essential part of providing services. The look and feel of a digital product is a determining factor on how accessible and useful it is. An intuitive interface makes services easier to use and more accessible.

Recommendation: The City should develop a common template and design guidelines to support a unified City brand. The City should also continue to build cross-departmental “one-stop” sites that help residents and visitors find the content and services they need as quickly as possible.

Style guides and pattern portfolios should accompany the central template in order to support department design efforts. The City should pursue flexible standards that help identify each service as part of the City family but allows for independent design to meet specific user needs.

The development of design standards will contribute to the creation of a single City brand, which should reflect the wide array of responsibilities and services we offer. Design guides like a color palette and common information architecture elements will support the City’s makeover and improve service delivery.

The City should also continue to build service “portals” that help consumers find what they need in one place. The Business Portal has proven the value of creating a one-stop-shop, helping to streamline service delivery both for City departments and consumers.

Major Deliverables:

- Logo and branding guide: Develop branding and visual standards.
- Website templates.
- Style guide.
- Support the City’s transition to Drupal by developing a rollout strategy for web templates.
- Redesign web experience.
- Build service portals.

Deeper Look: San Francisco Housing Service

The Mayor's Office of Housing and Community Development, in partnership with the Department of Technology and the Mayor's Office of Civic Innovation, is currently building new tools to search and apply for affordable housing online. This project is using modern digital best practices to build a new "digital by default" service that redesigns the affordable housing application and lottery user experience from the ground up, including standardizing the application for housing across programs and developments. The new service will eventually serve as a single place to search and apply for all City-funded affordable housing, making it far easier to navigate the currently fragmented ecosystem.

The service directly reflects the needs of real people who are seeking or have recently sought housing, with the team conducting weekly user testing with actual housing applicants throughout the design and development process. Our website development team is using modern agile development methodology, building in two-week sprints. They are releasing updates piece by piece, starting small and adding additional features in subsequent, regular releases. Just 8 weeks after the first quiet release, the site had nearly 6,000 visitors/month with 43% visiting from a mobile device.

This housing portal represents another ongoing project that can be used to create a common look and feel across the City. The development team built the entire website to be open source and with an API, which means that the content and architecture of the site are completely open for the public to connect with, learn from, replicate, and use for other services and in other communities.



5 New Strategy & Governance Body

To achieve our goal of building better services that meet modern technology expectations, the City will need to constantly update our strategy. However, governance should not become another bureaucratic hurdle. Departments and their staff know their customers best, and any cross-departmental process should promote responsiveness to user needs.

Recommendation: A central governing body is needed to manage the ongoing strategy and approve standards. A working group of digital service experts should be formed to promote the collaboration and movement towards common standards.

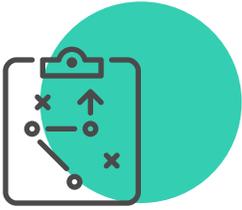
The Committee on Information Technology (COIT) is uniquely situated as a central governing body to support this role. The working group should be chaired by the Digital Services Officer with membership composed of the most visible services.

Responsibilities for the working group should include regular updates to the City's Digital Services Strategy. Members should also review and approve citywide service design standards that impact accessibility, visual branding, and product quality.

Major Deliverables:

- Support updates to the City's Digital Services Strategy.
- Prioritize service redesign.
- Align citywide investments with the Digital Services Strategy.
- Approve citywide quality and design standards.
- Provide a platform to share best practices and department strategies.

Implementation Plan



By implementing the recommendations described above, a Digital Services Team should make significant progress in changing the City's approach to service design in the next year.

In addition, the Digital Services Team should complete an inventory of all City services. Choosing what services to begin redesigning will have a significant impact on the success of the overall strategy. An inventory is a first step towards selecting appropriate projects.

Project Redesign Criteria

Through collaboration with City departments, the Digital Services Officer should identify key services to begin strategic redesign. The following criteria could be used to determine which services should be selected:

Scale: What size is the target user population of the service?

Volume: How many transactions are performed each year?

Need: How many complaints are received by the service?

Are paper processes used in the service?

How burdensome is the service to provide?

Search terms on [sfgov.org](https://www.sfgov.org)

Meaningfulness: What kind of impact does the service provide the public?

Current Cost: Ongoing maintenance, staffing costs

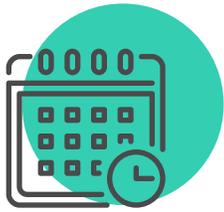
Cost per transaction

Estimated Cost to Redesign: Projected cost for strategic redesign

Speed to redesign service

Cost for vendor support

Estimated in-house costs to support service



Quarterly Milestones in Year 1

Over the course of the next year, the Digital Services Team will be responsible for developing a work plan and identifying what deliverables can be achieved. Most of the following items can be achieved with full staffing and resources.

Q1

- Skills and Tools Gap Analysis** Identify what skills the City already has to support the Digital Services Team, and what skills are needed.
- Short Term Training Plan** Develop plan to train existing City staff to update methods.
- Accessibility Standard** Establish an Accessibility Standard for all City digital services, and a process for quality assurance.
- Formalize Governance Structure** Regular meetings between major service centers. Serves as oversight and approval body for strategy implementation.
- Digital Services Inventory** Identify all web and digital projects that are in development. Begin collaboration.
- Recruiting Campaign** Launch recruiting effort. Aim to fill most vacancies by end of Q2.

Q2

- Complete City Services Inventory** Inventory of City services.
- Client Engagement Approach** Share with departments existing skills and services available from central team. Develop Service Level Agreements with department clients.
- User-Testing Services** Establish model for departments to conduct user-testing.
- Web Quality Standards** Development of product quality standards including visual design and content guidelines.
- Prioritize 3 Projects for Service Redesign** Develop methods to identify and prioritize services to redesign using strategic principles.

Q3

- Build Service Directory ● Build a directory for the public to access City services.
- Designer and Developer Toolkit ● Identify a set of technical tools, software, and other resources to provide to the teams building the digital products.
- Design Standard ● Develop common website template for the Drupal system; Provide guidance for non-Drupal sites.
- City Logo and Branding Guide ● Develop a logo and branding guide based on the branding and visual standard; Identify candidate departments for logo updates.

Q4

- Redesign City Services ● Complete business process mapping. Active development of digital tools to support service.

Ongoing

- Professional Development ● Develop guide & retrain staff in modern methods.
- Digital Performance Metrics ● All digital products should measure how the service is used. Performance standards monitor and compare services.
- Web Content Rewrite ● Train and support Departments on City content practices.
- Web Design and Development ● Support the development of digital products.
- Standards Development ● Development of branding, visual, accessibility, and content standards and guidelines for the development and design process.
- Procurement Handbook ● Support departments in selecting vendors and using a modern product approach.
- Digital Vendor Pool ● Issue RFP to create an ongoing pre-approved list of quality web design and dev companies.
- Redesign City Services ● Strategic redesign of City services.

Making Progress



To reach our goal of creating a user-focused culture dedicated to developing a continuous cycle of service improvements, we'll need to make a lot of changes. But the work ahead of us is feasible and the reward is well worth the effort!

As we begin our journey towards strategic redesign, we want to measure progress. Performance metrics will mature over time and will ultimately be defined and owned by the Digital Services Team. The following are a few criteria we will use to measure our progress in relation to our strategic values.

Success Criteria

Put Residents First: Resident needs should define the design of City services.

Are the digital services being consumed and meeting the expectations and needs of the constituent?

Digital by Default: Services should be delivered digitally whenever possible.

How many digital services are available in support of or in place of a standard business transaction?

Integrated Service: Digital services should be managed by the core business, and not siloed in IT.

How many digital services are available in support of or in place of a standard business transaction?

Build Expertise: The City should establish a team with modern skills and support an agile development culture.

How many digital services are available in support of or in place of a standard business transaction?

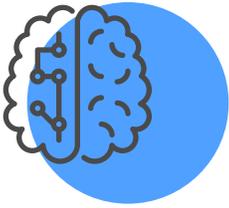
Collaborative Process: Development of City service standards should be collaborative and contribute to a shared strategy.

How many digital services are available in support of or in place of a standard business transaction?



@mhill426

Appendix A: Methodology



Creating a culture shift is not easy. It is an iterative process where San Francisco will grow and learn how to adopt new practices and routines. In order to adapt to modern demands, the City will have to learn to accept risks. In this fashion, building a citywide digital strategy is an initial test.

WE TRY IT OUT, WE EVALUATE, WE LEARN

The development of the Digital Services Strategy is a first step. Over the last year, we've researched and learned from our peers, the public, and from departments about their service strategies. The effort was led by a core group representing a wide view of the City, including:

Committee on Information Technology | Mayor's Office of Civic Innovation
Mayor's Budget Office | DataSF | Department of Technology | 311

Throughout our entire research, our team constantly focused on a central question: how does the public experience City services? Through the annual City Survey and various data sets collected by City departments, our team strived to put into practice the ideals of the project.

Our research expanded by looking at what other municipalities and organizations have done to improve service delivery. This problem is not new, and we wanted to learn the best practices from others. Among the most prominent examples were the United Kingdom's Government Digital Service and the U.S. Federal Government's Digital Services. Both examples are pioneers in completely transforming how the government interacts with the public on digital platforms.

We also examined several strategic efforts led by local governments including New York City, Chicago, and Boston among others. Across the country, municipal governments are rethinking their digital presence, and how they can deliver better services.

Once we got a better understanding of how other governments are initiating a culture change, we turned back to focus on San Francisco. We interviewed departments across the City to learn what services they offer and how they wanted to improve. We worked with people across the City to identify pain points, those recurring issues that residents and visitors complain about and departments struggle to remedy.

We also focused on San Francisco's digital footprint and how it is being used to meet the needs of residents and visitors. Over the years, San Francisco City departments have built hundreds of websites and are continuing to build new digital services every year. Our team analyzed how these projects were developed and identified the new projects coming in the future.

Appendix B: Digital Services Dictionary



Committee on Information Technology (COIT):

San Francisco’s Committee on Information Technology (COIT) is the City’s technology planning and governance body. COIT is composed of five permanent members (the Mayor, the President of the Board of Supervisors, the Controller, the City Administrator, and the Chief Information Officer) and eight department heads representing a broad range of the City’s major service areas. The Committee also includes two members of the public who have backgrounds and expertise in technology, public policy, or both. COIT is dedicated to setting policies and the overall direction of the San Francisco City and County Information Technology Community. COIT has led the development of this Digital Services Strategy.

Content Strategy:

Think of a content strategy in terms of “communicating” or “delivering information.” Creating a content strategy means finding the most effective way to communicate or inform your constituent, customer or user. A complete content strategy focuses on the planning, creation, delivery, and governance of content. Content not only includes the words on the page but also the images and multimedia that are used. Ensuring that you have useful and usable content that is well structured, and easily found is vital to improving the User Experience of a website. Content Strategists are important members of a Digital Services team.

DataSF:

DataSF’s mission is to empower use of the City’s data. The core product is SF OpenData the City’s official open data portal. Launched in 2009, the data portal contains hundreds of city datasets for use by developers, researchers, analysts, residents, and more. DataSF believes that open data has the potential to support a range of outcomes from increased quality of life, more efficient government services, better decisions, and new businesses and services.

Digital Application:

Digital applications are digital products or services that are interactive. These include web transactions like website forms to submit information, purchase an item, pay a fee, make a reservation or appointment, or sign up or enroll in a program. A example of a common application is the sign in process, also called authentication. Applications need to be carefully designed and tested, managed and operated by an ongoing team and designed to be integrated with physical/paper aspects of the service delivery.



Digital Front Door:

City websites are now the first place to look for information and services. The City's homepage sfgov.org has become the new front door to the City and County of San Francisco. Customers coming to our websites should be able to find the information or the service they want quickly and easily.

Digital Presence:

Digital Presence simply means all the space an organization occupies on the internet. Most commonly this is a website, but in recent years companies have expanded their digital online presence with channels including mobile-optimized web content, apps, and social media accounts.

Digital Product:

Digital products are simply products that exist in digital form. Examples include downloadable music, e-books, software, mobile apps, websites and online games. In the context of the City, public-facing digital products may deliver core City transactions online (such as business permitting) or provide information (such as park opening hours.)

Digital Standards / Digital Guidelines:

Digital Standards and Guidelines help to control the content, function and appearance of a digital presence and ensure consistency and cohesiveness between multiple Digital Products developed by an entity. This may include product development standards governing accessibility or user experience, website templates, a content style guide, a pattern library or color palette. This strategy recommends that the City should adopt modern, user-centered design methods for the development of all services.

Information Architecture:

Put simply, Information Architecture is the practice of organizing information in a way that makes it easy to navigate and use. The goal of Information Architecture in a digital strategy is to help online users find information they are looking for and complete tasks, like paying a bill online. This may include the structure of a website, the way content is labeled, or how integrated search functions display results. Information Architecture is a core component of Content Strategy and to delivering excellent User Experience (UX).



Mayor's Office of Civic Innovation (MOCI):

San Francisco's MOCI is a small team that is tasked with creating an environment that allows innovation to flourish at City Hall, championing new ideas, tools and approaches in city government. The team informs and expands the Mayor's vision for the City through exposure to new fields, organizations and ideas by piloting new programs and taking strategic risks.

Product Design:

Design applies to more than how a product looks. While visual design focuses on the appearance and aesthetics of a Digital Product, design as a whole can apply to an organization, a service, a transaction, an interaction, or the entire experience. Product Designers lead user research, produce prototypes and designs, and iteratively improve the service experience.

Product Development / Product Engineering:

Product Developers design, build and operate public-facing digital products and services to deliver core business transactions online. In the private sector, these are the teams that build the American Airlines or Target website that you see as a public user, so that you can book plane tickets or order shoes online. In an existing organization that wants to digitize, the Product Development Team will work closely with the business owners of an existing service to collaboratively build a new digital product.

Product Manager:

A Product Manager is responsible for coordinating the Digital Product lifecycle, including the design, development, rollout and operation of a Digital Product. This role is vital in the implementation of any digital strategy. Tasks may include analysis of competitor products, defining the requirements of the product, user analysis, vision setting, managing designers and developers to build the product, user testing, and product launch.

Shared Services Model:

Shared services is a concept of consolidating the provision of services into a single organization. Shared service models generally arise when a single service was previously provided by more than one organization, creating redundancy and inefficiencies. In San Francisco, examples of shared services include the Department of Technology which supports the network which many other departments use. Another example is the City's Human Resources Department which provides a shared service for recruitment and hiring. The benefits of a shared services model include greater accountability, consistent service levels, standardized processes and cost savings through economies of scale.



URL:

A URL is a website address, such as www.sfgov.org. It stands for “Uniform Resource Locator”, but most people simply refer to it using the acronym.

UX / User Experience:

UX stands for User Experience, and refers to the user satisfaction when using Digital Products.

User experience is a lot more than the way a site or service looks. It includes the entire experience of a user - from what they read, to how they feel, to what they click on, to whether or not they are satisfied by the product or service. Every possible way that a user interacts with your product or service is included in the User Experience. Usability, User Interface, User Research, and User Testing are all a part of ensuring the user has a good experience.

Web Content Management System (WCMS):

Software that supports website creation, design, content authoring, management and administration. San Francisco is transitioning to Drupal as its primary Web Content Management System, but other software platforms are available.

Appendix C: Statistics



Local Government*

B- In general, residents of San Francisco rated the whole of local government a B-

311

B+ 311 is a central entrance point for residents and visitors to access City services. 311 provides information services and helps residents track service requests. Overall, residents are happy with the service, grading it a B+

36% of residents have used 311 in the past year.

31% use the phone service, 19% use 311 online

Ease of using 311 service is B+ across the board

Services to Seniors and People with Disabilities

B+ Accessibility is a major design goal for all City services. San Francisco offers several services dedicated towards our seniors and our residents with disabilities.

Overall, 39% of seniors have used a City assistance program. About 10-15% of seniors were not aware of City programs with the remainder not interested in assistance.

14% of San Francisco residents have a disability.

50% of San Francisco's disabled population have used a City assistance service. About 10-15% of disabled were not aware of City programs. The rest do not want assistance.

San Francisco Public Library

B+ San Francisco's libraries are a key part of our community and are generally well liked by residents. The City can learn a lot about service design by the model provided by the library.

Assistance from librarians A+

Online library services get a B+

Internet access at library computer stations B+



311 Service Requests

As the City's main service center, 311 closely tracks requests from residents and visitors. In 2015 alone, 311 has opened 451,687 service requests! Below are some other insights on how 311 is used. All data is available on San Francisco's Open Data portal at data.sfgov.org

Status

Open 325,436

Closed 24,163

Format

Voice 151,890

311 Website 51,096

Twitter 1,538

Open311 API 123,889

Paper Mail 1

City Department 21,185

Category

1 Street and Sidewalk Cleaning 118,643

2 Graffiti Public Property 35,690

3 General Requests 30,594

4 Abandoned Vehicle 22,262

5 Graffiti Private Property 21,406

6 MUNI Feedback 19,393

7 Sewer Issues 11,164



Website Data

The City & County of San Francisco currently maintains hundreds of websites, many of which have completely independent urls and design. The decentralized nature of City websites makes performance analysis extremely difficult.

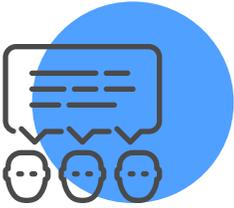
One of the major goals of the Digital Services Strategy is to improve our coordination of City websites, and provide collective analysis. Using our homepage sfgov.org as an example, the City wants to better understand how residents and visitors use our websites.

SFGOV.org Homepage

Page views	3,074,918
Unique Page views	2,575,854
Average Time	3 minutes, 38 seconds
Bounce Rate	80%

Mobile Friendly	Yes
Google Develop Accessibility Test	7 failures
Top 5 search result	Yes
Readable URL?	Yes

Appendix D: Interviews & Workshops



Over the last years, our strategy working group conducted extensive research to build the Digital Services Strategy. Recognizing that many other cities are embarking on their own journey to build digital strategies, we wanted to share our work.

Included below are some of the materials we used to shape our strategy development process.

Case Study Framework: Template used to research other efforts to improve digital services.

Interview Script: Questions used to learn about existing services & pain points.

Insights Workshop: Facilitation materials to analyze department interview data.

Public Survey Questions: Survey was issued on December 2, 2015.

Department Workshop: Facilitation materials to build final recommendations.

Strategy Development Document: Case Study Framework

As you write, please use the 15 categories below as the sections of your case study. We've included example questions in gray to guide your thinking, but they are just suggestions; each case study will be somewhat unique.

Once all case studies are completed, we will cross-reference them in a matrix. To make that easier, for each of the following categories, **please write a high-level summary (1-2 sentences max, could be just a phrase) at the top of each of the 15 section in your case study.**

Don't worry if you can't fill out all the sections. Some governments haven't set a cohesive or thoughtful public experience strategy, but that doesn't mean we can't learn from them. (E.g. Are there individual initiatives or pieces of their approach that are working? Is there something they've tried that has failed?)

The questions in each section are merely meant as guidance. Feel free to use or disregard them. Ultimately, find whatever information is available and simply use this as guidance.

GOVERNMENT OR ORGANIZATION:
DATE:

BACKGROUND

1. Catalyst for Change

What spurred the organization/government to enact change?

What was the state of their public experience before they started?

2. Philosophy and/or Key Areas of Focus

Does the organization/government/entity have an articulated, organization-wide public experience strategy? If so, summarize it; It may include an approach to building the user experience, UX standards, a web strategy, customer service standards, etc.

Do they have a written philosophy, mission statement, or motto?

What did they tackle first? What are their primary goals and tactics?

If they don't have an organization-wide public experience strategy, do they have individual initiatives that we could learn from?

3. Key Tradeoffs

What didn't the organization/team focus on and why?

What were some of the tradeoffs?

4. Timeline

High-level timeline of their efforts and results.

When did they start?

How did they prioritize and order their strategy?

How long did successive parts of their strategy take?

PROCESS - Internal Organizational Strategy

5. Governance: Leadership, Reporting & Organizational Structure

How do they structure governance (ie. who is in charge, what is that person or group's title, who reports to whom, where does the organization/agency/division sit relative to other agencies or divisions?)

How do they divide responsibility?

Did they consolidate services, processes and teams between departments/agencies - and if so, how?

How do their digital service and content teams (ie. developers, designers, writers, etc.) collaborate or work with their policy, program, and public information staff?

Is there an executive mandate, or are they leading by example/bringing others along through inspiration and persuasion?

6. Staffing

Headcount, roles, skills and salary ranges.

7. Recruitment

How do they recruit staff and what's their recruiting philosophy?

Where do they source candidates and what experience and skills are they looking for?

Who leads recruitment within the organization?

Do they have any best practices for recruitment materials, content, or job descriptions?

Have they identified key "selling factors" to attract great candidates?

8. Budget

What is their annual budget and a rough breakdown of how it is spent?

Where is the money allocated organizationally?

How has the budget changed over time?

What's their long-term budget sustainability?

9. Approach to Vendors

What portions do they [in-source](#) or out-source?

What kind of vendors do they work with?

How do they recruit vendors?

How do they structure contracts and manage vendor work?

PRODUCT - What is the public experience that they are building?

10. Product: Core content & service philosophy

What are their product goals?

Have they focused primarily on discovery, content, services? All three/something else?

How do they decide what to prioritize?

11. Digital Service Delivery

Do they integrate with legacy technologies or are they building end-to-end systems from scratch?

How standardizes is the front-end “look and feel” for the public?

What internal business application platforms have they used? Are the various platforms integrated in any way?

OUTCOMES

12. Key Achievements

What is the Return on Investment (ROI)?

How have they reduced costs, delivered improved performance, or otherwise shown progress?

13. Metrics

How do they measure and track progress?

What standards do they use to measure effective digital services and web content

14. Major barriers/roadblocks

What difficulties has the team/organization faced?

Have they overcome them and if so, how?

15. Looking Ahead

What’s next for this team or project?

What projects/products are coming up?

Are there any major organizational changes expected (new leadership, new structure, expansion, etc.)?

Strategy Development Document: Interview Script

Activities

Please describe your department's mission.

From a resident's perspective, what are the services your department offers?

- What is a service residents think your department offers, but it actually don't?

Which of those services are the highest volume? (Identify core service)

How do residents generally complete service transactions with you?

Please walk us through step-by-step how a resident/visitor would retrieve your core service.

Capacities

Please give an overview of how you are staffed and resourced to provide your public services?

How do you work with other departments? How do they support your work? How do you support theirs?

Do you have people who build, create, or manage your web content and services? About how many?

- What about DT? Has your staff worked with the web teams there?
- Please walk us through a recent web development project. Who did you talk to? How did you do it?

Challenges

What do residents complain the most about your department?

What transaction with your departments is the most challenging for a resident to complete? Why?

Which service transaction is most challenging for you to deliver? What causes the most headaches and takes up time for your staff? Why?

When it comes to public-facing technology (delivering information, content and city services online) what are your department's biggest challenges?

Aspiration

What is the next big improvement your department is planning? How will a digital component be incorporated?

Ok, dreaming big, if you had all the resources available, what would you want the customer experience look like?

More immediately, what is the one digital/online project related to public service delivery that you would want to tackle, if you had access to funding and the right tech team?

Strategy Development Document: Insights Workshop

Introduction

To date we have a lot of raw material to draw on that form the basis of insights that can help us shape and motivate the work further. The sources include:

- Case studies
- Departmental interviews
- Readings shared among the group
- Our own experiences

We've gone pretty broad, so the purpose here is to start to narrow a bit onto key insights that can:

1. Provide evidence-based purpose for future recommendations
2. Help relate the work we've done to peers and others that have not been "in the room" with us to date

The workshop format is pretty simple and at the end we should have:

1. insight statements,
2. evidence for those insights, and
3. broad themes or groups that emerge from those insights

that can help frame future work.

Format

Overview (10 minutes)

Quick overview of this format and goals of the workshop.

Individual Brainstorming (5 minutes)

Brainstorming can be done individually at first using **BLUE** post its to write a single insight. For example:

"Small departments have a harder time acting on digital service delivery"

Immediately following that pair a **YELLOW** post it with where evidence of that insight can be found. For example, for the last one:

"Animal Care and Control Interview"

The goal here is not to be exhaustive but to create triggers for matching, sorting and discussion later.

Insights Bingo (30 minutes)

This should be fairly rapid. Here's how this works:

1. First person puts an insight out
2. Everyone with a similar insight, call out Bingo! and match it up with the one that just went out, you can describe any variations where applicable
3. Everyone that just put insights out starting with the first person, quickly mention your evidence and set it down next to the new pile of insights
4. Move on to the next person with a different insight, wash, rinse repeat until all insights are on the table.

There's no discussion yet during this exercise.

Break (5 to 10 minutes)

Take a moment to take it in, use the restroom, grab a glass of wine. Did something someone say trigger something? Feel free to scribble down some new insights and bring them back when we start in on the discussion. Survey the room of insights and start thinking about groupings, frameworks, dimensions. It's your break, use it however suits you.

Bundling Insights (45 minutes)

Before we begin, we'll take a moment to fill in additional insights that occurred to folks over the break. We can continue to add as we go as well, but the core activity will be about bundling and creating themes or groups that can help frame and further refine the work.

What are the themes that seem to emerge from the insights? We can start with an insight and pose the questions:

- Which insight statement (if there are multiple) is the best representative in the group?
 - Do we generally agree with the insight statement? We'll mark disagreement with a dot, if we get stuck.
- Is it part of a broader theme along with other insight statements? Or does it stand on it's own?
- What's the theme/group this insight speaks to?

Wrap up (10 minutes)

We'll capture any lingering issues, concerns in notes, take pictures of the stickies and discuss next steps. If we have time, one or two of us can quickly digitize the insights, evidence and themes that came out of the workshop.

Strategy Development Document: Public Survey Questions

The following survey was issued to the public on December 2, 2015:

<https://sfmoci.typeform.com/to/gv2T4Z>.

The survey was distributed via the following channels: SFGov Twitter account, DataSF website, SF MOCI Twitter account,

The results of the survey can be found here: <https://sfmoci.typeform.com/report/gv2T4Z/SZcl>

Survey Text:

We would like feedback on your experience interacting with the City and County of San Francisco government.

Local government services include things like calling 311, checking out a book from the library, paying for parking tickets and utilities, applying for a job with city government, ordering a marriage license and applying for a business permit.

1. Have you completed transactions, received services, or found information related to San Francisco government in the past?
 - a. Yes
 - b. No
 - c. Not sure
2. If yes, how have you completed transactions, received services, or found information related to San Francisco government? Choose all the methods you have used
 - a. Mail (paper form)
 - b. Fax (paper form)
 - c. Phone
 - d. In-person (counter service & paper form)
 - e. Online (mobile or smartphone)
 - f. Email
 - g. Text Message
 - h. Other
3. If you had to choose one method for completing transactions, receiving services, or finding information related to San Francisco government, which would be your most preferred method?
 - a. Mail (paper form)
 - b. Fax (paper form)
 - c. Phone
 - d. In-person (counter service & paper form)
 - e. Online (incl. mobile or smartphone)
 - f. Email
 - g. Text Message

4. When was the last time you visited sfgov.org or another San Francisco government website?
 - a. Last week
 - b. Last month
 - c. In the last 6 months
 - d. More than a year ago
 - e. I don't remember ever visiting a SF government website
 - f. Other
5. Please rate your overall experience with online information or services from San Francisco government.
 - a. 1 -- Very poor
 - b. 2
 - c. 3 -- Average
 - d. 4
 - e. 5 -- Very good
6. How much do you agree with the following statement? **It is easy to find the information I need on San Francisco government websites.** If the question isn't relevant to you, you can skip to the next one.
 - a. 1 -- Strongly disagree
 - b. 2
 - c. 3 -- Neither agree nor disagree
 - d. 4
 - e. 5 -- Strongly agree
7. How much do you agree with the following statement? **San Francisco government websites and online information are well-organized.** (If the question isn't relevant to you, you can skip to the next one.)
 - a. 1 -- Strongly disagree
 - b. 2
 - c. 3 -- Neither agree nor disagree
 - d. 4
 - e. 5 -- Strongly agree
8. How much do you agree with the following statement? **San Francisco government websites and online content are easy to understand and read.** (If the question isn't relevant to you, you can skip to the next one.)
 - a. 1 -- Strongly disagree
 - b. 2
 - c. 3 -- Neither agree nor disagree
 - d. 4
 - e. 5 -- Strongly agree

9. How much do you agree with the following statement? **San Francisco government websites and online services have a design that is modern and pleasing.** If the question isn't relevant to you, you can skip to the next one.
- 1 -- Strongly disagree
 - 2
 - 3 -- Neither agree nor disagree
 - 4
 - 5 -- Strongly agree
10. How much do you agree with the following statement? San Francisco government websites and online services are convenient and easy to complete. If the question isn't relevant to you, you can skip to the next one.
- 1 -- Strongly disagree
 - 2
 - 3 -- Neither agree nor disagree
 - 4
 - 5 -- Strongly agree
11. How would you describe San Francisco's government websites and online services in one or more words?
12. You're almost finished! Now, a few quick questions about you. How old are you?
13. Are you a resident of San Francisco?
- Yes
 - No
14. Do you work in San Francisco?

Strategy Development Document: Department Workshop

Total Workshop Duration- total 1hr 45m

1. INTRODUCTION TO THE PUBLIC EXPERIENCE PROJECT

10 minutes // plenary

- What PEP is about
- Who we are: COIT, MOCI, DataSF, DT, 311, Business License Portal
- Where we are
- Goals for today's workshop:
 - Sharing — Review of case studies + spectrums
 - Input on vision for the PEP outcomes
 - Input on governance for citywide digital services. We need your input for developing the recommendations/strategy for senior leadership.
 - Understanding your projects and resources that could align with PEP. What projects should we be considering?
 - If you think of a project that you're working on that fits in PEP, put your post-its, make sure they make it up on the board before we leave - write your name/Dept on post-it or just email us.
 - Specific color and place

2. VISION: DESIGN A SERVICE

25 minutes // breakout groups

- 15 mins -- Design a Service.
 - 1) **Describe the steps for the user experiencing this government service.** At your table, pick from one of the four example services, (or if you'd like to pick another service from your Department, that works!) How would you redesign this service? Think about the ideal service for users. Don't worry about the way it's done now. Put yourself in role as citizen, you're not a bureaucrat! Pick a beginning point around when you think users should be interacting with the City.
 - a) Getting a birth certificate
 - b) Registering a business
 - c) Getting a residential parking permit
 - d) Getting a dog license
 - 2) **How do you want the user to feel in this process?**
- 7 mins -- Krista to pick 2 groups to share with room

3. SHARING: PUBLIC EXPERIENCE CASE STUDIES + SPECTRUMS

20 minutes // plenary

- 15 minutes: Case Studies & Spectrums Presentation
 - Review of case studies provided in digital packet
 - Overview of research/insights
 - Overview of elements/spectrums and where SF is
- 5 minutes: Q&A

4. INPUT: FINDING THE RIGHT BALANCE FOR SFGOV

40 minutes (possibility to extend) // breakout groups self-select based on interest

- Prep: Write spectrums on large stickies and print out of individual spectrums for breakout tables, re-organize yourselves, at table will be a copy of the spectrum. Set timer for 20 mins from start.
- 20 minutes-- Exercise & all 5 groups present for 3 minutes

- 1 - Where does San Francisco belong on the Spectrum
- 2 - To reach that point, what changes would be required by your department?
- 3 - What are the barriers to get to that point?

Visual Brand & Experience

- The visual look and feel of the City brand in all digital public touchpoints
- Includes colors, fonts, and visual styles, as well as interaction decisions like navigation menus and how forms are designed

Standardized

Not Standardized



Standardized

An organization-wide visual standard, with style guide and pattern library used by all Departments.

Some Standardization

A general, lightweight central style guide. Departments and programs have some amount of latitude to customize and deviate.

Free for All

Project or program managers make design choices with little standardization.

Properties & URLs

- "Where we are" on the web: domain names and URLs
- Are URLs easy to read, remember, and understand?
- One-stop shop: If multiple departments are involved in a service (i.e. a permitting process), does the user have to visit multiple sites?

Consolidation

Proliferation



Centralized

Websites are consolidated into one main web property, using subdomains (e.g. dept. sfgov.org and directories to give distinct space.

"Hub and Spoke"

One central property with a few secondary properties for major branches.

Central Service Catalog

Single consistent service/info catalog, while the layer below is a free for all.

Many Separate Sites

Subdomains and directories registered without guidance or oversight.

Product Development Team

- How work gets done and products are built
- Technologists with roles like including designers, developers, product managers, content strategists, user researchers, UX experts, data scientists

Centralized

Distributed



Centralized

The vast majority of digital work is done by a central product team.

Collaborative

A central digital team develops shared services across departments. The central team also develops apps for small departments. Larger departments have in-house teams .

Department-based

Development done with little coordination.

Departments either use

- DT services
- Hire their own staff
- Use a vendor

Product Quality Oversight

- Ensures that all public information and services meet a standard of service excellence.
- "Product authority" to approve/publish, including content as well as web products.
- Enforces consistent visual styles, UX, and URL/domain standards.

Centralized

Federated or Distributed



Centralized

A central team oversees quality for all City digital products. Provide standards and approvals to go live.

Departmental w/ Guidance

A central team issues guidance or standards, but depts are responsible for complying. A dept leader has final signoff.

Departmental

No citywide guidance. A dept leader has final signoff and may set their own standards for the department.

Free for All

Project or program managers create and publish without product quality oversight.

Strategy and Policy Governance

- Policy and business leadership, with budget authority and executive mandate.
- Where high-level decisions are made about priorities and resource allocation.
- Involves existing processes like COIT, CIO Review, budget process.



6. WRAP-UP

5 minutes // plenary

- What's next — recommendations, budget, etc.
- Bright spots are building around the City - here's how you can immediately plug in
 - Digital Meetup
 - Digital Collaboration & Engagement