



COUNTY OF SAN MATEO
INFORMATION SERVICES DEPARTMENT

DATE: July 24, 2001

HEARING DATE: August 7, 2001

TO: Honorable Board of Supervisors
FROM: Luther Perry, Director Information Services
SUBJECT: eGovernment Project Status Report

Luther Perry

RECOMMENDATION

Approve first quarter status report from the Information Services Department (ISD) for the eGovernment project.

Background

Your Board approved a comprehensive eGovernment plan at your June 12, 2001, meeting. This plan was developed between October 2000 and May 2001, and included extensive participation by all County departments and major divisions. The plan proposes to implement Web-based service for all County services that are amenable to this service modality. Some 565 County services were identified.

A supplemental report was presented at your 2001 Budget Hearings with a first-year list to be addressed by the first-year budget based on a number of criteria, most importantly whether the services were necessary for (or at least highly compatible with) the project start-up process and the need to establish a firm technical foundation. These criteria are attached to this memo as Exhibit C.

This list of 48 services is organized into five project clusters for project management purposes, with work to proceed simultaneously in all five areas. Departments were consulted regarding the selection of services in their areas of responsibility and some adjustments were agreed. The final list, attached to this memo as Exhibit D, is in agreement with the departments.

eGov Objectives

- ★ Provide via the Internet all County government services that are Web-compatible
- ★ Implement over 3-5 years
- ★ eGov becomes the preferred services access and delivery model

- ★ Design and implement a new Web page structure based on “citizen view” and organized around service – not the County department/division legal structure
- ★ Incorporate “portal” technology and an extensive, easily used “search” capability
- ★ Re-engineer County service models to incorporate eGov fully in the ongoing processes and procedures of departments
- ★ Increase the level of automation in County service models and convert current automated systems for Web compatibility

Major Policy Issues

These issues will be addressed first by staff analysis, followed by Executive Council review. Most will also be brought to your Board for final action.

- ◆ Strongly standardize the “look and feel” of the County Web site
- ◆ Emphasize science-based “human factors” engineering above “eye candy” and excitement
- ◆ Incorporate all County Web activity and services on one site
- ◆ Place funding for ongoing maintenance in department budgets, subject to strong standardization and ISD audits
- ◆ Departments will have to allocate significant staff time to participate in and support development and implementation of projects in their area of responsibility

Project Organization

The eGov project has been divided into five project groups as follows:

<u>Group</u>	<u>Details</u>
Content Organization	portal, “look and feel”, search, content management some specific content projects
Forms Processing	on-line forms creation, management, on-line processing
Individual Applications	new Web-based transactions, Web-enabling current systems
Infrastructure	secured remote access, business transactions via Web, public access to data, generic interface software, programming tools, communications, hardware
GIS Applications	geography-based functions

Each group will have specific technical staff allocations and work plans.

Each group will also have an external review body to monitor progress and manage policy

The Project Leadership and Architecture team will have overall project responsibility and ensure

coordination between work groups, reporting to Executive Council and the Board of Supervisors.

Exhibit A contains a project organization diagram and detailed description.

Web Administration Committee

Existing County bodies or managers are the logical responsible parties for all of the project elements except the Web site itself; the County does not now have a Web coordinating committee or "Webmaster" with responsibility for Web standards, "look and feel", or on-going change control.

We propose creation of an oversight committee for these purposes. The recommended committee structure is four Executive Council volunteers plus representatives from CMO, ISD and County Counsel. This committee would have significant work involving policy issues, Web standards, and site design over the next 6-9 months, with a reduced work load after that time.

Project Execution

A project plan for the first quarter is attached for your reference as Exhibit B. This is the time during which most efforts must focus on the critical issues of infrastructure design and content organization architecture. These elements must be resolved before significant work on Web services can proceed. The first-quarter plan includes development of a detailed project plan for the following quarters.

There are a varieties of implementation strategies that should be considered, prominently including the possibility of following the project path and infrastructure of another agency (such as the State) and the appropriate areas for contracting project activities.

Reporting and Approvals

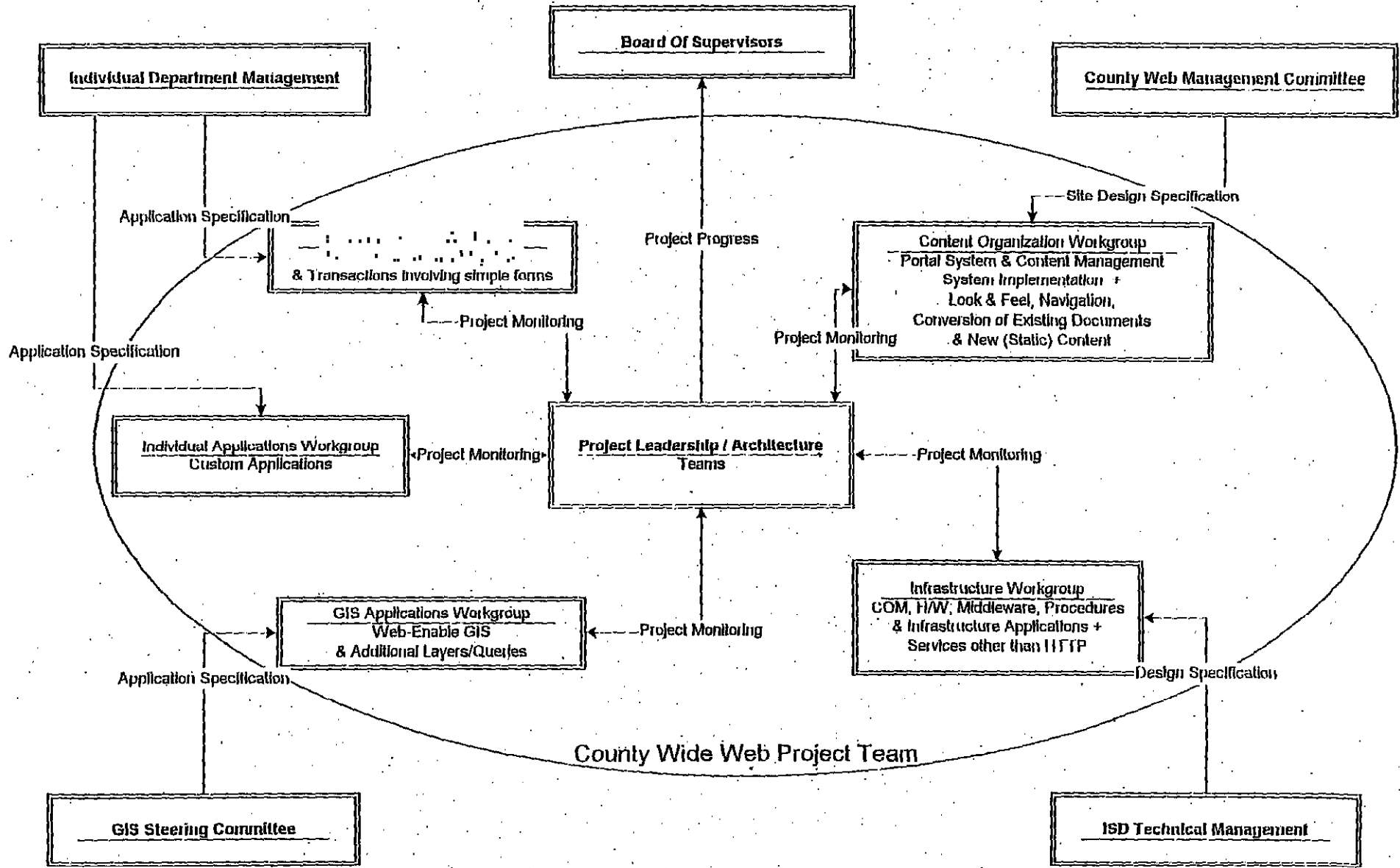
We anticipate formal quarterly project reports, to be presented to Executive Council at the first meeting of each quarter (October, January, April, and June), then forwarded to your Board at your next meeting. Policy issues will normally be raised and resolution sought via these reports. Some policy matters may be raised separately when resolution is needed before the next report is scheduled.

Attachments:

- Exhibit A – eGov Project Organization
- Exhibit B – First Quarter Project Plan
- Exhibit C – Priority Criteria
- Exhibit D – Proposed First-Year Project Listing, by Work Group

San Mateo E-Gov Project Governance Structure

DRAFT



Proposed San Mateo E-Gov Project Governance Structure
 July 17, 2001
 Draft

External to the technical project team, there will exist five committees or groups that will approve the project deliverables. The formation of these groups is based upon an analysis of the first year's deliverables. Also, these groups have a direct link to a group within the technical project team. See the attached diagram for the relationship. Attached is a description of the five groups and their current formation status.

Board of Supervisors:

Purpose: To approve scope and project plan. Monitor project progress.
 Formed and staffed.

County Web Management Committee

Purpose: To approve the overall organization and the "look and feel" of the web site.

Status: Not formed

Suggested staffing:

- Department or Division Head representing County business areas
 (Volunteers from the Executive Council - limit of four)
 - Criminal Justice
 - Health
 - Human services
 - All other areas

Individual Department Management

Purpose: To approve the web applications being built for that specific department.

Status: Formed and staffed

GIS Steering Committee

Purpose: To approve the internet GIS applications.

Status: Formed and staffed

Members: Luther Perry, Warren Slocum, Michael Jackson, Terry Burns

ISD Technical Management

Purpose: To approve technical architecture and implementation.

Status: Formed and staffed

Members: Luther Perry, Chris Flatmoe, Charles Borden

Project Leadership / Architecture Teams

Purpose: Establish standards and insure coordination between the five technical workgroups and monitor progress on a day to day basis.

Status: Formed and partially staffed

Members:

- Project Leadership Team: Luther Perry, Chris Flatmoe, Charles Borden, Candi Clarno
- Architecture Team: Chris Flatmoe, Charles Borden plus the lead of each technical workgroup

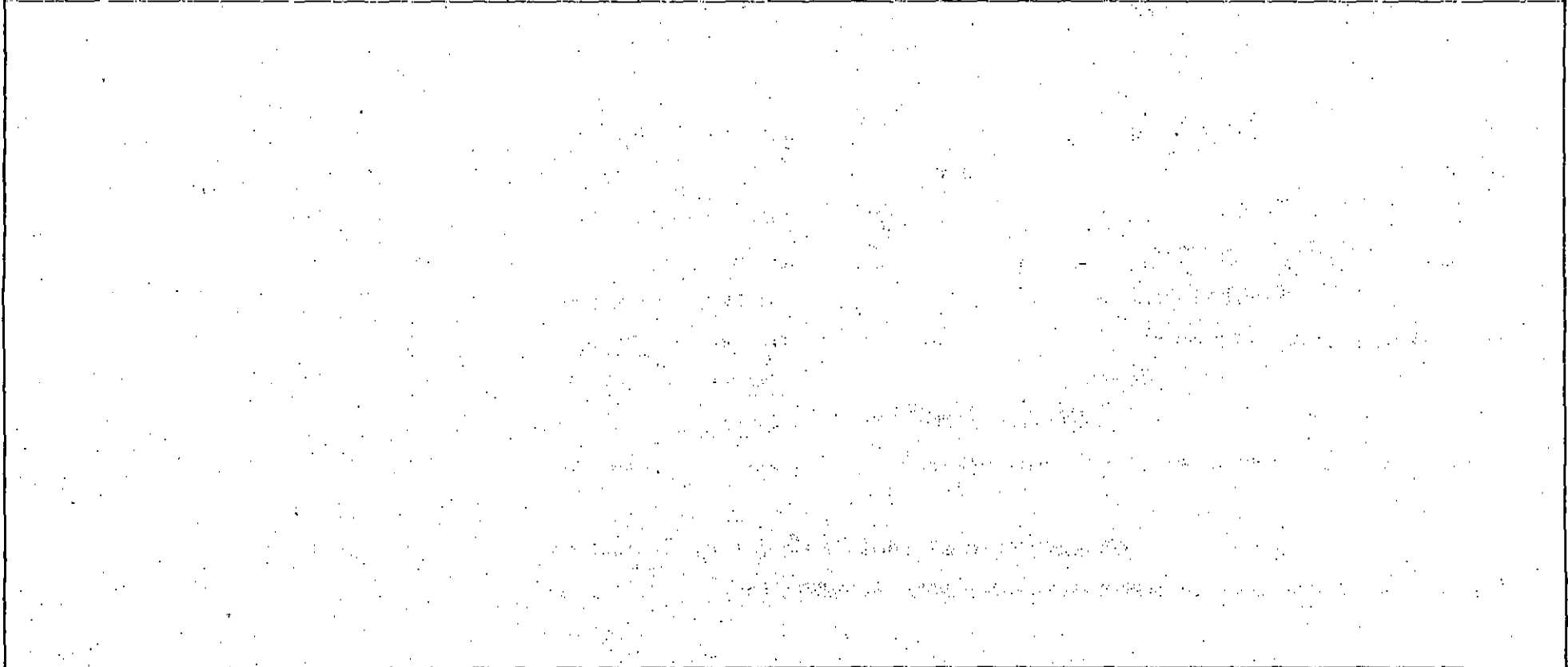
ID	Task Name	Start	Finish	July				August				September				
				6/17	6/24	7/1	7/8	7/15	7/22	7/29	8/5	8/12	8/19	8/26	9/2	9/9
1																
2	Develop project plan	Wed 7/18/01	Fri 9/7/01													
3	Produce first three months task list	Wed 7/18/01	Wed 7/18/01													
4	Finalize first three month plan	Thu 7/19/01	Mon 7/30/01													
5	Produce detail project plan	Mon 8/20/01	Fri 9/7/01													
6	Build Project Team	Mon 6/18/01	Fri 9/14/01													
7	Define project organization	Mon 6/18/01	Fri 7/27/01													
12																
13	Staff project team	Mon 7/2/01	Fri 9/14/01													
14	Define Skills requirements	Mon 7/2/01	Fri 7/27/01													
15	Assess internal staff	Mon 7/30/01	Fri 8/10/01													
16	Obtain staff	Mon 7/30/01	Fri 9/14/01													
17	Infrastructure workgroup	Mon 7/30/01	Mon 8/27/01													
18	Content organization workgroup	Mon 7/30/01	Fri 9/7/01													
19	Individual applications workgroup	Mon 8/6/01	Fri 8/31/01													
20	Forms process workgroup	Mon 9/3/01	Fri 9/14/01													
21	GIS applications workgroup	Mon 7/30/01	Wed 9/12/01													
22																
23	Develop Infrastructure design	Mon 7/30/01	Fri 9/21/01													
24	Develop requirements	Mon 7/30/01	Thu 8/30/01													
25	Search for existing models	Mon 7/30/01	Thu 8/30/01													
26	Develop and evaluate alternative architectures	Mon 7/30/01	Fri 9/21/01													

DRAFT

Project: First project plan
Date: Wed 7/18/01

Task		Rolled Up Task		External Tasks	
Progress		Rolled Up Milestone		Project Summary	
Milestone		Rolled Up Progress			
Summary		Split			

ID	Task Name	Start	Finish	July							August				September			
				6/17	6/24	7/1	7/8	7/15	7/22	7/29	8/5	8/12	8/19	8/26	9/2	9/9	9/16	
27	Finalize Infrastructure architecture	Fri 9/21/01	Fri 9/21/01															
28	Develop content organization design	Fri 8/10/01	Fri 9/21/01															
29	Develop requirements	Fri 8/10/01	Wed 9/12/01															
30	Search for existing models	Fri 8/10/01	Wed 9/12/01															
31	Develop and evaluate alternative architectures	Fri 8/10/01	Fri 9/21/01															
32	Finalize content management architecture	Fri 9/21/01	Fri 9/21/01															



Project: First project plan
Date: Wed 7/18/01

Task		Rolled Up Task		External Tasks	
Progress		Rolled Up Milestone		Project Summary	
Milestone		Rolled Up Progress			
Summary		Split			

e-Gov Project Priorities

8 Major Factors

- ◆ **Broadly spread across County departments \ divisions**
- ◆ **Mix of complexity and technologies**
- ◆ **Eliminates \ reduces trips to County Offices**
- ◆ **Public interest categories from surveys (starting 2002-03)**
- ◆ **Pilot for “family” of comparable services (e.g. “appointments”)**
- ◆ **Mix of service targets (citizens, business’, government agencies).**
- ◆ **Cost-effectiveness from citizen perspective**
- ◆ **Coordination with County program initiatives**



Public benefits of e-Gov

- ◆ Reduce \ eliminate physical travel to County offices
- ◆ No waiting: “on-line, not standing in line”
- ◆ 24 hrs. a day, 365 days a year (24x7)
- ◆ Easier and broader constituent participation in governance
- ◆ One-stop shopping
- ◆ Service oriented access, not agency oriented
- ◆ No postal delays
- ◆ Clear guidance to proper agency for all services

Proposed workgroup assignments from recommended list

Sr#	TOC#	Project	Estimate	Dept.	ISD	Department
1	V.15	Improve contents and presentation of main County web page.	\$,###	1	1	County Manager
2	XXXII.12	Update County web site for usability and Technology improvements.	###,###	1	1	Information Services
3	X.14 XVIII.2 XXVIII.18 XXXII.13 XXXIV.7	Add "smart search" capability to the entire County web.	##,###	1	1	Multiple -- Countywide Issue
4	XXXII.16	Provide a general content management system.	##,###	1	1	Information Services
5	XXXII.17	Provide a general portal system.	###,###	1	1	Information Services
6	XXX.4	Calendar of events	\$,###	1	1	Health/Emergency Medical Services
7	VI.2	Procedures for public to post property bonds for bail.	\$,###	1	1	County Counsel
8	VII.2	Consumer fraud complaint forms for downloading	\$,###	1	1	DA/Criminal
9	VIII.1	Forms for downloading	\$,###	1	1	DA/Family Support
10	XIX.1	Provide links to local humane society	\$,###	1	1	ESA/Animal Control
11	XVII.1	Improved, clearer links to library pages from County web pages	###	1	1	ESA/Libraries
12	XXIV.38	Easier to find and access web pages.	\$,###	1	1	Health/Public Health
13	XXV.3	Referral and abuse reporting forms for downloading	\$,###	1	1	Health/Aging and Adult Services
14	XXXI.8	List of Shelters and Referral Organizations	\$,###	1	1	Human Services Agency
15	XXXIII.1	Access to information about various providers; schools, service agencies, etc.	\$,###	1	1	Probation
16	XXXIV.3	Encroachments permit applications for downloading.	\$,###	1	1	Public Works
17	-----	Rework existing content into portal/branded format	##,###		1	Countywide Issue
		Total of Estimate:	###,###			

Proposed workgroup assignments from recommended list

Sr#	TOC#	Project	Estimate	Dept.	ISD	Department
1	XXXII.14	Provide a general forms management system.	\$\$\$\$	1	1	Information Services
2	II.7, V.4, V.9, XI.10, XII.2, XX.11, XXIII.9, XXIV.39, XXVIII.11, XXXIV.13	Customer satisfaction surveys.	\$\$\$\$	1	1	Multiple – Countywide Issue
3	VII.3	Consumer fraud complaints -- on-line	\$\$\$\$	1	1	DA/Criminal
4	XII.6	Intranet: Ability for employees to register for training.	\$\$\$\$	1	1	EPS/Organizational Development
5	XXVI.2	Enable on-line registration for training	\$\$\$\$	1	1	Health/Patient Care Council
6	XXXI.32	Provide means for anonymous child abuse prevention tips.	\$\$\$\$	1	1	Human Services Agency
7	XXXVI.11	Form for anonymous complaints about deputies	\$\$\$\$	1	1	Sheriff's Office
		Total of Estimate:	\$\$\$\$,\$\$\$\$			

E-Government Project
Proposed workgroup assignments from recommended list

Sr#	TOC#	Project	Estimate	Dept.	ISD	Department
1	I.5		\$\$, \$\$\$	1	1	Assessor - County Clerk-Recorder
2	I.8		\$\$, \$\$\$	1	1	Assessor - County Clerk-Recorder
3	VI.20	and or court case number.	\$\$, \$\$\$	1	1	Courts
4	VI.7	Ability for traffic violators to request extension of citation due date.	\$\$, \$\$\$	1	1	Courts
5	XIV.6	Provide Purchase Orders by e-mail	\$\$, \$\$\$	1	1	EPS/Purchasing
6	XVI.2	Issue routine building permits	\$\$, \$\$\$	1	1	ESA/Planning
7	XVIII.28	Parks reservations.	\$\$, \$\$\$	1	1	ESA/Parks and Recreation
8	XVIII.4	Volunteer registration/scheduling	\$\$, \$\$\$	1	1	ESA/Parks and Recreation
9	XXXI.45	Web enable Alcohol & Drug provider reporting.	\$\$, \$\$\$	1	1	Human Services Agency
10	XXXVI.6	Ability for citizens to schedule meetings for non-emergency reports.	\$\$, \$\$\$	1	1	Sheriff's Office
11	XXXVI.7	Ability to schedule car seat security checks	\$\$, \$\$\$	1	1	Sheriff's Office
12	II.21	Intranet. Provide employees with e-pay-stub	\$\$, \$\$\$	1	1	Controller
		Total of Estimate	\$\$\$, \$\$\$			

E-Government Project
Proposed workgroup assignments from recommended list

Sr#	TOC#	Project	Estimate	Dept.	ISD	Department
1	XXVI.12	Remote access for medical staff	\$,,\$,\$\$	1	1	Health/Patient Care Council
2	XXXII.15	Provide a general appointment management system.	,\$,\$,\$\$	1	1	Information Services
3	XXXVII.4	Provide public access to "production", most current data.	,\$,\$,\$\$	1	1	Tax Collector - Treasurer
4	XXIV.14	Provide physicians, medical groups and CBOs with health alerts via e-mail; customized to their specialty.	\$,,\$,\$\$	1	1	Health/Public Health
5	XXIX.4	Create self-help groups as chat-rooms	\$,,\$,\$\$	1	1	Health/Mental Health
6	-----	Com, Hardware, Middleware	,\$,\$,\$,\$\$		1	Countywide Infrastructure
		Total of Estimates	,\$,\$,\$,\$,\$\$			

ISD

E-Government Project

Proposed workgroup assignments from recommended list

Sr#	TOC#	Project	Estimate	Dept.	ISD	Department
1	XXXII.20	Provide GIS support on the web	\$\$, \$\$\$	1	1	Information Services
2	XXXII.4	Show government services, on a map, around a stated address or APN	\$\$, \$\$\$	1	1	Information Services
3	XXXII.5	Capture master street/address index: City/County/Post-office/911 address coordination	\$\$, \$\$\$	1	1	Information Services
		Total of Estimates	\$\$\$,\$\$\$			