## CITY OF SAN JOSE
### CAPITAL OF SILICON VALLEY

# Memorandum

**TO:** HONORABLE MAYOR
AND CITY COUNCIL

**FROM:** Khaled Tawfik
Jennifer Schembri

**SUBJECT: DIGITAL WORKFORCE
STATUS REPORT**

**DATE:** August 22, 2022

Approved ~~Zl+LLl~~

Date 8/23/2022

## RECOMMENDATION

Accept the status report on Digital Workforce, including Business Process Automation and impacts of efforts to improve City business processes for staff and the public as part of the approved City Initiatives Roadmap for 2022-2023.

## OUTCOME

The Committee will provide feedback on the City of San José's (City) Digital Workforce efforts, including Business Process Automation and OneCity Workplace, and receive an update on the impacts and challenges around these efforts.

## BACKGROUND

Three core components of the City's Digital Workforce Initiative, a priority of the Fiscal Year (FY) 2022-2023 City Roadmap[1], are (1) Business Process Automation, (2) OneCity Workplace, and (3) Digital Public and Hybrid Meetings. This report addresses the first two. The latter is addressed in a separate report to the Committee.

The City Business Process Automation Team (Automation Team) was formed in June 2020 with a mission to digitize and automate the City's many paper-based, manual forms and processes. To date, the Automation Team has automated more than 80 internal and external City forms. On average, the Automation Team has reduced end-to-end processing time of those processes by about 60 percent compared to prior manual, paper-intensive modes. In this update, staff provides details about the tools used to automate, how departments identify workflows for automation, and the Automation Team's workplan for FY 2022-2023.

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[1] 2022-2023 City Initiatives Roadmap: https://www.sanjoseca.gov/home/showdocument?id=86061

Business Process Automation originated as part of the City's 2017-2020 Information Technology Strategic Plan[2], which included development and adoption of the City's eSignature policy, ordinance, and investments into a workflow and electronic signatures platform supported in the FY 2019-2020 City Budget Process[3]. City Council approved the contract award[4] based on a competitive procurement in March 2020. This time well to support the Drive to Digital work necessitated by the COVID-19 pandemic and the City's large-scale transition to work from home practices due to public health orders. Associated work tracked in the FY 2021-2022 City Roadmap[5] under the Powered by People initiative. For the FY 2022-2023 City Roadmap, the Digital Workforce initiatives houses the City's BPA efforts. Additional detail is available in the January 26, 2022, Informational Memo on the Powered by People[6].

*OneCity Workplace*

The City's Digital Workforce initiative includes the OneCity Workplace project. OneCity Workplace aims to transition the City's existing intranet site and mix of portals to a more functional and collaborative space that better suits a modern hybrid workforce. By integrating the City's work processes and common technology tools, staff aims to implement a platform that make it easier for teams to mimic in-person activities online, including: (1) finding City staff, teammates, and getting advice easily (People to People); (2) enabling collaboration on City initiatives and priorities (People to Processes); and (3) accessing information so employees can more efficiently provide services (People to Information).

As part of the FY 2022-2023 City budget, City Council approved one-time funding of $500,000 for the project. This combines with a one-time funding of $400,000 allocated in FY 2021-2022, for a total project budget of $900,000. The Human Resources Department serves as the product owner for the Citywide initiative, with the Finance, Public Works, and Information Technology Departments expected to serve major ongoing roles in its success.

## ANALYSIS

This analysis section is divided into three sub-sections. First, staff examine the tools used to automate workflows, including the software platform and that team's use of agile project delivery. Second, staff details the process we use to identify forms for automation and how candidate workflows the executive team prioritizes projects for the Automation Team to deploy. Last, staff provides a forward look at the Automation Team's FY 2022-2023 workplan.

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[2] 2017-2020 IT Strategic Plan: https://www.sanjoseca.gov/home/showpublisheddocument/32607/636755517222900000
[3] See Item 6. Business Process Automation Platform, page VIII – 243, Information Technology Department FY 2019-2020 Operating Budget: https://www.sanjoseca.gov/home/showpublisheddocument/44802/637108763268270000
[4] Item 2.20, May 24, 2020 City Council Agenda: https://sanjose.legistar.com/LegislationDetail.aspx?ID=4398075&GUID=67D7F5A1-8B2E-43B3-A858-0201D95FDC08
[5] Special Meeting of the City Council on the City Roadmap From COVID to Recovery: https://sanjose.legistar.com/View.ashx?M=A&ID=790190&GUID=88EABA41-98E2-4D71-943A-F822A92B14ED
[6] Powered by People Information Memo, 1/26/2022: https://www.sanjoseca.gov/home/showpublisheddocument/81672/637789781453770000

## Automation Tools

The Automation Team employs two workflow automation tools: PeopleSoft and SimpliGov. Generally, the City uses PeopleSoft to automate processes that impact timekeeping, payroll, employee benefits, and processes personnel transaction that affect employee statuses. The City uses SimpliGov to automate all other forms, including any external facing forms. The complete list of all automated processes and enhancements are listed in Appendix A.

In addition to the automation tools employed, the Automation Team uses several agile[7] project management tools to complete projects. First, staff uses a framework called Objectives and Key Results (OKRs) to define agreed commitments on a quarterly basis. Second, the Automation Team is organized into a scrum (an agile project management methodology) that sets out bi-weekly commitments tied to the team's quarterly goals.

Organizing the team into a cross-departmental, cross-functional scrum has been the key to success. The technical and functional team members meet regularly to design, build, test, and deploy automations to ensure that processes optimize to meet business needs and are sustainable for technical delivery. Teams can then iterate and improve their workflows over time.

The Information Technology Department presents the results of each quarter's OKRs, as well as the proposed next set of OKRs to the Business Process Automation Executive Team once a quarter. For reference, the OKRs for Quarter 1 of FY 2022-2023 and the previous set for Quarter 4 of FY 2021-2022 are provided in Appendix C.

## Business Process Automation Prioritized Workplan and Unranked Backlog

The Business Process Automation Steering Committee meets twice a year to engage in a facilitated prioritization exercise to score the proposed automations and enhancements to workflows on several criteria, including: (1) community benefit, (2) mitigation of risks or opportunity enablement, (3) urgency, and (4) complexity. Out of this prioritization process, the Automation Team produces a prioritized workplan of future workflow automations and enhancements. The current prioritized workplan is listed in Appendix B.

The prioritized workplan represents the workflows that have been prioritized by the Steering Committee for the Automation Team. A longer list of prospective workflows is tracked in an unranked backlog. With some exceptions, workflows start in the unranked backlog and move to the prioritized workplan it they rank high in quarterly prioritization. Occasionally, an urgent workflow is prioritized and activated with staff adjusting the workplan accordingly. For example, in January 2022, the Automation Team prioritized a COVID-19 paid sick leave workflow to

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[7] Agile Project Management is defined as "a method of project management, used especially for software development, that is characterized by the division of tasks into short phases of work and frequent reassessment and adaptation of plans. Example: agile methods replace high-level design with frequent redesign." (Source: Google.com)

quickly automate an approval that saved thousands of hours of manual data entry and coordination[8]. Staff add new candidate workflows when suggested or asked, such as automating existing paper forms, creating new processes, or enhancing existing workflows.

From June 2020 through December 2021, department leadership from Human Resources, Finance, Information Technology (ITD), Office of Employee Relations, and the City Manager's Office identified most workflows prioritized. In February 2022, the Automation Team worked to broaden feedback from more departments by way of a payroll flyer to all City staff. From this effort, the Automation Team identified a handful of new workflows. Generally, feedback reaffirmed biggest pain points for staff and requests were already identified in the backlog.

**Business Process Automation Workplan for Fiscal Year 2022-23**

Currently, the Automation Team has eight members: four business leads from the Human Resources Department, Finance Department, and the Office of Employee Relations and four technical staff from ITD[9].

Of the four total technical staff, budgeted positions include one Products-Projects Manager and three developers. The Product-Projects Manager role and two of the three developer positions are currently vacant due to recent promotions of two staff members. The Automation Team Workplan for FY 2022-2023 represents matches current, decreased capacity. As technical resources are hired, the Products-Projects Manager overseeing the effort will adjust the workplan. New SimpliGov workflows and enhancements face greater reduction as the PeopleSoft has maintained staffing levels. ITD is also evaluating options to use add contractual capacity to augment the City's internal teams and address variable needs when they arise.

**Table 1: Business Process Automation Prioritized Workplan for FY 2022-2023**

| Priority | Workflow Name | Platform | Estimated Delivery | Current Status |
|---|---|---|---|---|
| 1 | Leave of Absence Request Form | PeopleSoft | Q1 2022-23 | Development |
| 2 | Administrative Leave | PeopleSoft | Q1 2022-23 | Analysis |
| 3 | Employee Reimbursement - Education Reimbursement | PeopleSoft | Q1 2022-23 | Analysis |
| 4 | Employee Reimbursement - Professional Development Request & Reimbursement (PDP) | PeopleSoft | Q1 2022-23 | Analysis |
| 5 | HR Offboarding (Notice of Separations) | PeopleSoft | Q1 2022-23 | Analysis |
| 6 | Benefits Billing/Arrears | PeopleSoft | Q1 2022-23 | Analysis |

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[8] In late January 2022, the City learned the State of California would require employers like the City to implement a new entitlement to COVID-19 paid sick leave. The City implemented similar leave entitlements in 2020 and 2021. Both programs necessitated significant manual calculations for each application received. The City anticipated hundreds of new applications.

[9] Between June 2020-December 2021, the Information Technology Department temporarily reassigned 1 technical resource from the financials system team to augment and automation efforts. In January 2022, the resource returned.

| | | | | |
|---|---|---|---|---|
| 7 | Easy Employee Onboarding Pilot (including system access, licenses, equipment, etc.) | SimpliGov | Q1 2022-23 | Analysis |
| 8 | CeS Enhancement: Add Form 700 Liaison & Clerk Review Stages | SimpliGov | Q1 2022-23 | Development |
| 9 | CeS Enhancement: Usability Enhancements | SimpliGov | Q1 2022-23 | Development |
| 10 | Enhancement: Email Submit for Directors | SimpliGov | Q1 2022-23 | Backlog |
| 11 | Viscode Request Form | SimpliGov | Q2 2022-23 | Backlog |
| 12 | Travel Request and Reimbursement Forms: Phase 1 (workflow only, uploaded form) | SimpliGov | Q1 2023-24 | Backlog |
| 13 | Enhancements to TempU | PeopleSoft | Q2 2022-23 | Backlog |
| 14 | Tier 1 Rehire / Reciprocity Form | PeopleSoft | Q2 2022-23 | Backlog |
| 15 | Enhancements to Life Events modules | PeopleSoft | Q2 2022-23 | Backlog |
| 16 | Employee Parking Card Application (Parking Pass) | SimpliGov | Q2 2022-23 | Backlog |
| 17 | Employee Reimbursement - Uniform and Equipment | SimpliGov | Q3 2022-23 | Backlog |
| 18 | Reports To/Position Section Change Updates | PeopleSoft | Q3 2022-23 | Backlog |
| 19 | ITD Change Management Enhancement: Calendar Integration | SimpliGov | Q3 2022-23 | Backlog |
| 20 | Probation Ext/Term | PeopleSoft | Q3 2022-23 | Backlog |
| 21 | Premium Pays - 10 forms | PeopleSoft | Q4 2022-23 | Backlog |
| 22 | Request for Self-Insurance Form | SimpliGov | Q4 2022-23 | Backlog |
| 23 | Alternative Work Schedules | PeopleSoft | Q4 2022-23 | Backlog |
| 24 | PeopleSoft User Access Request Form | PeopleSoft | Q4 2022-23 | Backlog |
| 25 | Safety Shoe Voucher Request Form | SimpliGov | Q4 2022-23 | Backlog |

**OneCity Workplace Requirements Gathering**

In late-2020, a team of City staff participated in the City's first Human Centered Design Learning Lab, offered through Powered by People, to gather requirements on how the City can optimize virtual productivity. The Learning Lab prompted City staff to gather information to solve three challenges in our current workforce:

1. *How might we create an engaged and informed workforce?*
2. *How might we optimize virtual productivity?*
3. *How might we improve collaboration in a distributed workspace?*

The team interviewed departments to understand the challenges employees have experienced in remote work. As a result, an initial draft of the project requirements was created with a focus on the following three priorities to improve interactions and quality of services: (1) People to

People, (2) People to Processes, and (3) People to Information. See below, Figure 1, for a OneCity Workplace Vision diagram which includes the project purpose, requirements, and rate of investment of a successful digital workplace.

## OneCity Workplace

The City's digital workspace to drive employee **engagement**, **retention**, and a **culture** of collaboration

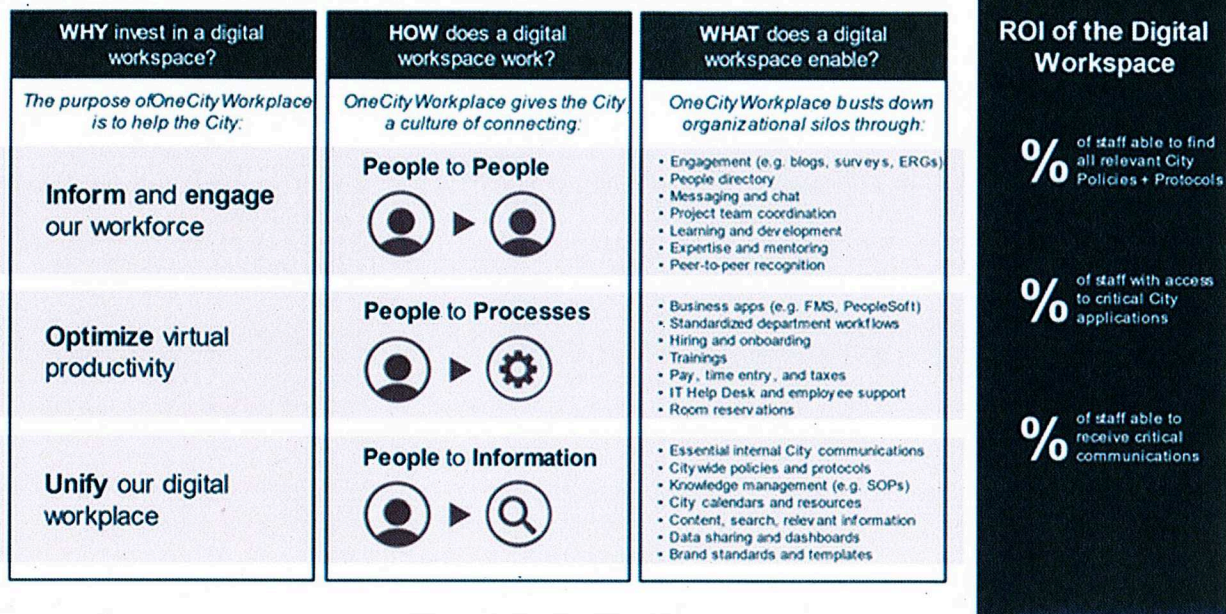| WHY invest in a digital workspace? | HOW does a digital workspace work? | WHAT does a digital workspace enable? | ROI of the Digital Workspace |
|---|---|---|---|
| The purpose of OneCity Workplace is to help the City: | OneCity Workplace gives the City a culture of connecting: | OneCity Workplace busts down organizational silos through: | |
| **Inform** and **engage** our workforce | **People to People** | • Engagement (e.g. blogs, surveys, ERGs) • People directory • Messaging and chat • Project team coordination • Learning and development • Expertise and mentoring • Peer-to-peer recognition | % of staff able to find all relevant City Policies + Protocols |
| **Optimize** virtual productivity | **People to Processes** | • Business apps (e.g. FMS, PeopleSoft) • Standardized department workflows • Hiring and onboarding • Trainings • Pay, time entry, and taxes • IT Help Desk and employee support • Room reservations | % of staff with access to critical City applications |
| **Unify** our digital workplace | **People to Information** | • Essential internal City communications • City wide policies and protocols • Knowledge management (e.g. SOPs) • City calendars and resources • Content, search, relevant information • Data sharing and dashboards • Brand standards and templates | % of staff able to receive critical communications |

*Figure 1: OneCity Workplace Vision.*

In addition, the City conducted a Request for Information (RFI) for OneCity Workplace in Fall 2020. However, the information received did not identify a platform that could fully and consistently address the City's objectives for a platform to support a hybrid workforce. The project team is researching the vendor landscape and new product solutions post-pandemic. New products and services appear to have emerged that may meet the City's requirements. A new RFI will provide information on current solutions, their technical architecture, and cost structures to refine project requirements and a procurement approach for the City's team.

The City will pursue a compelling project approach, products evidencing strong adoption with maintained use, and superior support resources, all at a sustainable cost. By the end of FY 2022-2023, project staff expects to identify a vendor and start configuration and implementation, dependent on the Procurement Prioritization Board and staff capacity.

**OneCity Workplace Funding and Staffing Plan**

Lastly, as noted in Background, Council approved one-time funding as part of the City budget process in FY 2021-2022 and FY 2022-2023, for a total project budget of $900,000. While $400,000 is allocated for software, the additional $500,000 is allocated for staff support. As a

next step, project staff will determine a staffing plan to ensure proper support and maintenance of the OneCity Workplace system.

## CONCLUSION

The City's Business Process Automation tools are incredibly useful for streamlining City processes, reducing end-to-end processing time, as well as enabling a more hybrid workforce to work from any location. As of August 2022, the Business Process Automation team has automated 82 City forms and an estimated 17,000 hours are saved every month with routing and approvals versus previous paper practices. Digital workflows support hybrid work and a culture that focuses on faster and more efficient service.

Staff are working to hire new staff to the Business Process Automation team due to internal promotions. Hiring and training will delay delivery of current Digital workforce OKRs, which will be reported in the quarterly City Roadmap updates to City Council.

A Human-Centered Design exercise led by Human Resources and the Powered by People Branch of the COVID-19 Emergency Operations Center, identified needs from City employees reporting challenges in joining a virtual/hybrid organization, finding information and other City staff, and collaborating effectively with teammates. The pandemic created a digital workforce for employers. The City recognized the need to invest in new tools and processes to support the hybrid, in-person plus virtual workplace. The OneCity Workplace solution aims to provide City staff with that "one-stop" to easily engage and communicate with one another, collaborate, and find one central source for common information— e.g., Citywide policies, processes, and business process automation submittals— to improve service efficiency and effectiveness. A status report of OneCity Workplace is part of the Smart Cities and Service Improvement Committee's Work Plan scheduled for the June 2023 meeting.

## EVALUATION AND FOLLOW-UP

Staff is scheduled to present an update to the Smart Cities and Service Improvements Committee in June 2023.

## CLIMATE SMART SAN JOSE

The recommendation in this memo aligns with one or more Climate Smart San José energy, water, or mobility goals. As referenced in the June 2, 2022, "Green Information Technology Plan

Status Report[10]," the Automation Team's efforts to digitize paper forms significantly reduced the need for printed pages and saved an estimated 90,500 pieces of paper.


## PUBLIC OUTREACH

This memorandum will be posted on the City's website for the September 1, 2022, Smart Cities Committee meeting.


## COORDINATION

This memorandum has been coordinated with Human Resources Department, Finance Department, Office of Employee Relations, Information Technology Department, and the City Attorney's Office.


## COMMISSION RECOMMENDATION/INPUT

No commission recommendation or input is associated with this action.


## COST SUMMARY/IMPLICATIONS

**Business Automation Process—**

The City's FY 2022-2023 cost for its SimpliGov Agreement is approximately $227,400. City Council approved SimpliGov software for up to a five-year term from 2020-2025. If all options are exercised, total value of the contract is approximately $1,079,125 including any additional professional services rendered.

**SOURCE OF FUNDING**: General Fund, Fund # 001, Appropriation # 0432.

**FISCAL IMPACT**: Subject to availability and approval of funding through the annual budget process.

**OneCity Workplace—**

City Council approved one-time funding of $500,000 for the project for FY 2022-2023. This combines with a one-time funding of $400,000 allocated in FY 2021-2022, for a total project budget of $900,000.

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[10] Smart Cities and Services Improvements Committee, Meeting of 6/2/2022, Item (d)3: https://sanjose.legistar.com/View.ashx?M=F&ID=10915161&GUID=25A6A628-4D34-4A31-9F00-3396F6B31D77

**SOURCE OF FUNDING**: General Fund, Fund # 001, Appropriation # 220S

**FISCAL IMPACT**: Subject to availability and approval of ongoing funding for maintenance and support.


## CEQA

Not a Project, File No. PP17-009, Staff Reports, Assessments, Annual Reports, and Informational Memos that involve no approvals of any City action.


/s/                                                          /s/
KHALED TAWFIK                                   JENNIFER SCHEMBRI
CHIEF INFORMATION OFFICER              DIRECTOR
Information Technology Department          Human Resources Department and Office of
                                                                Employee Relations


For BPA questions, please contact Ashish Lakhiani, Products-Projects Manager, at ashish.lakhiani@sanjoseca.gov. For OneCity Workplace questions, please contact Shirley Duong, Products-Projects Manager, at shirley.duong@sanjoseca.gov. Erica Garaffo, Assistant to the City Manager, helped author this memo.

**Appendix A: Completed Business Process Automations**

In several cases, the BPA workflow consolidated multiple forms. The total number of forms automated is larger than the total number of workflows.

Where the "Reduction in Processing Time" value is blank, we either do not have an adequate estimate of the pre-automation processing time or the workflow did not have a manual predecessor to calculate a comparison.

| Workflow Name | Production Date | Platform | Reduction in Processing Time | # Forms Automated |
|---|---|---|---|---|
| 213RR | 5/1/2020 | SimpliGov | | 1 |
| Al Fresco Sidewalk/Parklet | 6/1/2020 | SimpliGov | | 1 |
| Al Fresco Private Property | 6/1/2020 | SimpliGov | | 1 |
| Al Fresco Parks and Plazas | 8/10/2020 | SimpliGov | | 1 |
| VPN (Remote Access) | 8/22/2020 | SimpliGov | 60% | 1 |
| Benefits Enrollment Change Form | 9/7/2020 | PeopleSoft | 95% | 1 |
| Time Off Requests | 10/5/2020 | PeopleSoft | 100% | 1 |
| Overtime Authorizations | 10/5/2020 | PeopleSoft | 100% | 1 |
| Contract eSignatures (New Contracts, Amendments, Options to Extend) | 10/5/2020 | SimpliGov | 64% | 1 |
| Request to Review Employee File | 12/11/2020 | SimpliGov | 88% | 1 |
| Standalone e-Signature (previously SimpliSign) | 12/14/2020 | SimpliGov | | 1 |
| ITD Change Management | 12/14/2020 | SimpliGov | 33% | 1 |
| Security Access & Badges | 12/17/2020 | SimpliGov | 45% | 1 |
| CA COVID-19 Leave Form | 2/18/2021 | SimpliGov | 77% | 1 |
| Budget Hiring Exemption Form | 3/5/2021 | SimpliGov | 80% | 1 |
| Director Award Contract (PW Capital Program) | 3/8/2021 | SimpliGov | | 1 |
| Capital Project Specifications (PW Capital Program) | 3/11/2021 | SimpliGov | | 1 |
| Capital Project Plans (PW Capital Program) | 3/11/2021 | SimpliGov | | 1 |
| Finance FMS/RevQ Access Request | 3/16/2021 | SimpliGov | 42% | 2 |
| OER Parking Accommodations | 3/29/2021 | SimpliGov | 52% | 1 |
| CED GreenValue PreEnrollment | 4/1/2021 | SimpliGov | | 1 |
| Temporary Employee Request | 4/12/2021 | PeopleSoft | 20% | 1 |
| HR Onboarding Forms for New Part-Time Hires | 4/23/2021 | PeopleSoft | 87% | 12 |
| ITD Invoice Approval | 5/30/2021 | SimpliGov | 67% | 1 |
| Mobile Device Authorization Form | 6/30/2021 | SimpliGov | 29% | 1 |
| Contracts eSignatures V2 (Service Orders, Notice of Exercise of Options, Already Executed Agreements) | 6/30/2021 | SimpliGov | 87% | 1 |
| Capital Construction Change Orders - PW | 6/30/2021 | SimpliGov | | 1 |
| Property Surplusing and Disposal Form | 7/19/2021 | SimpliGov | 33% | 1 |
| Religious Exception Request Form | 8/16/2021 | SimpliGov | | 1 |
| Medical Exemption Request Form | 8/16/2021 | SimpliGov | | 1 |
| Mileage reimbursement | 8/20/2021 | PeopleSoft | 99% | 1 |
| Eviction Help Center Survey | 9/1/2021 | SimpliGov | | 1 |

| | | | | |
|---|---|---|---|---|
| Finance Vendor Set Up/Maintenance Form | 9/7/2021 | SimpliGov | 60% | 1 |
| Finance Vendor Maintenance with Batch Script | 9/28/2021 | SimpliGov | | 1 |
| Solar Energy Access | 10/8/2021 | SimpliGov | | 1 |
| Technology New Project Intake | 10/15/2021 | SimpliGov | | 1 |
| P-Card Program Forms (P-Card Application) | 11/10/2021 | SimpliGov | 85% | 1 |
| P-Card Program Forms (Higher Spend form (now Spend Limit Change form) | 11/10/2021 | SimpliGov | 28% | 1 |
| P-Card Program Forms (Agreement form) | 11/10/2021 | SimpliGov | 59% | 1 |
| Insurance Compliance Review Request (Finance Form 149-7) | 11/10/2021 | SimpliGov | 61% | 1 |
| HR Dependent Verification Form | 11/15/2021 | PeopleSoft | | 1 |
| Request for Contract Insurance Specifications – RFP, RFP, Negotiated Contracts (Finance Form 148-22) | 11/18/2021 | SimpliGov | 96% | 1 |
| Higher Class Pay (Non-Management) | 11/19/2021 | PeopleSoft | | 1 |
| ESD Change Management Form | 11/19/2021 | SimpliGov | 35% | 1 |
| Flexible Workplace Form | 11/23/2021 | SimpliGov | 35% | 1 |
| P-Card Program Forms (Change of Information) | 12/2/2021 | SimpliGov | 28% | 1 |
| Council Referrals Tracking (Council, Budget and Committee Referrals) | 12/2/2021 | PowerAutomate | | 3 |
| Muni Water's Register Low Income and Vulnerable Customers | 12/17/2021 | SimpliGov | | 1 |
| Revenue Management Adjustment/Cancel Form | 12/20/2021 | SimpliGov | 69% | 1 |
| ITD Disable Microsoft/O365 license | 1/21/2022 | SimpliGov | | 1 |
| P-Card Program Forms (US Bank Admin Access request) | 3/9/2022 | SimpliGov | 20% | 1 |
| P-Card Program Forms (New/Change P-Card Coordinator) | 3/9/2022 | SimpliGov | 50% | 1 |
| Retire-Rehire Interest Pool Form | 4/4/2022 | Taleo | | 1 |
| Muni Water Leak Notification Form | 4/4/2022 | SimpliGov | | 1 |
| City Council Cost Estimate | 4/25/2022 | SimpliGov | 11% | 1 |
| PRNS - City Field Use Form | 5/13/2022 | SimpliGov | 39% | 1 |
| HR Confidentiality Statement | 5/23/2022 | SimpliGov | 93% | 1 |
| Employee Reimbursement - General Reimbursement | 5/27/2022 | SimpliGov | 63% | 1 |
| DE-4 (State Tax Form) | 6/24/2022 | PeopleSoft | | 1 |
| HR Onboarding Forms for New Full-Time Hires | 6/30/2022 | PeopleSoft | 87% | 9 |
| **Total** | | | **60%** | **82** |

## Appendix B: Business Process Automation Ranked Workplan and Unranked Backlog

| Priority | Workflow Name | Platform | Estimated Delivery | Current Status |
|---|---|---|---|---|
| 1 | Leave of Absence Request Form | PeopleSoft | Q1 2022-23 | Development |
| 2 | Administrative Leave | PeopleSoft | Q1 2022-23 | Analysis |
| 3 | Employee Reimbursement - Education Reimbursement | PeopleSoft | Q1 2022-23 | Analysis |
| 4 | Employee Reimbursement - Professional Development Request & Reimbursement (PDP) | PeopleSoft | Q1 2022-23 | Analysis |
| 5 | HR Offboarding (Notice of Separations) | PeopleSoft | Q1 2022-23 | Analysis |
| 6 | Benefits Billing/Arrears | PeopleSoft | Q1 2022-23 | Analysis |
| 7 | Easy Employee Onboarding Pilot (including system access, licenses, equipment, etc.) | SimpliGov | Q1 2022-23 | Analysis |
| 8 | CeS Enhancement: Add Form 700 Liaison & Clerk Review Stages | SimpliGov | Q1 2022-23 | Development |
| 9 | CeS Enhancement: Usability Enhancements | SimpliGov | Q1 2022-23 | Development |
| 10 | Enhancement: Email Submit for Directors | SimpliGov | Q1 2022-23 | Backlog |
| 11 | Viscode Request Form | SimpliGov | Q2 2022-23 | Backlog |
| 12 | Travel Request and Reimbursement Forms: Phase 1 (workflow only, uploaded form) | SimpliGov | Q1 2023-24 | Backlog |
| 13 | Enhancements to TempU | PeopleSoft | Q2 2022-23 | Backlog |
| 14 | Tier 1 Rehire / Reciprocity Form | PeopleSoft | Q2 2022-23 | Backlog |
| 15 | Enhancements to Life Events modules | PeopleSoft | Q2 2022-23 | Backlog |
| 16 | Employee Parking Card Application (Parking Pass) | SimpliGov | Q2 2022-23 | Backlog |
| 17 | Employee Reimbursement - Uniform and Equipment | SimpliGov | Q3 2022-23 | Backlog |
| 18 | Reports To/Position Section Change Updates | PeopleSoft | Q3 2022-23 | Backlog |
| 19 | ITD Change Management Enhancement: Calendar Integration | SimpliGov | Q3 2022-23 | Backlog |
| 20 | Probation Ext/Term | PeopleSoft | Q3 2022-23 | Backlog |
| 21 | Premium Pays - 10 forms | PeopleSoft | Q3-4 2022-23 | Backlog |
| 22 | Request for Self-Insurance Form | SimpliGov | Q4 2022-23 | Backlog |
| 23 | Alternative Work Schedules | PeopleSoft | Q4 2022-23 | Backlog |
| 24 | PeopleSoft User Access Request Form | PeopleSoft | Q4 2022-23 | Backlog |
| 25 | Safety Shoe Voucher Request Form | SimpliGov | Q4 2022-23 | Backlog |
| 26 | CeS Enhancement: Add "No End Date" Option | SimpliGov | Q1 2022-23 | Backlog |

| | | | | |
|---|---|---|---|---|
| 27 | Travel Request and Reimbursement Forms: Phase 2 (Digital Form + Workflow) | SimpliGov | Q1 2023-24 | **Backlog** |
| 28 | Salary Requests for Hire/Promotions | SimpliGov | Q1 2023-24 | **Backlog** |
| 29 | Add/Deletes (Positions for PCN) | PeopleSoft | Q1 2023-24 | **Backlog** |
| 30 | Signature Authority Form | SimpliGov | Q1 2023-24 | **Backlog** |
| 31 | MPP: Recommendations for Increase | SimpliGov | Q2 2023-24 | **Backlog** |
| 32 | CeS Enhancement: Add Optional CAO Analyst Review Stage | SimpliGov | Q2 2023-24 | **Backlog** |
| 33 | CeS Enhancement: Add Multiple Vendors | SimpliGov | Q2 2023-24 | **Backlog** |

# Unranked Backlog

| | | |
|---|---|---|
| P-Card Enhancement: Add Additional # of Approvers Option | TBD | Unranked |
| Voluntary Furlough | TBD | Unranked |
| IT Offboarding (for separations, transfers, and leaves) | TBD | Unranked |
| Higher Class Pay (Management) | TBD | Unranked |
| MPP: Performance Appraisal Form | TBD | Unranked |
| NMPP: Performance Appraisal Form | TBD | Unranked |
| Timesheet Adjustment Form | TBD | Unranked |
| Pre-designation of Personal Physician / chiropractor | TBD | Unranked |
| Benefit Forms - (Wellness, Commuter, HSA and LTD (year-round enrollments) | TBD | Unranked |
| Bilingual Form | TBD | Unranked |
| City Council Memo Departmental Process | TBD | Unranked |
| EOC Staff Acknowledgement Form | TBD | Unranked |
| Ergo Request Form | TBD | Unranked |
| Exception Time Reporting | TBD | Unranked |
| OSHA Log (HR) | TBD | Unranked |
| Outside Work Permit | TBD | Unranked |
| PW Acceptance and Dedication Recordation | TBD | Unranked |
| PW Site License Agreements | TBD | Unranked |
| Qualified Promotional | TBD | Unranked |
| Reduced Work Week Request | TBD | Unranked |
| Retiree Change Of Address | TBD | Unranked |
| Server Instance Request | TBD | Unranked |

| | | |
|---|---|---|
| Student and in lieu Attestations & SSN Verifications | TBD | Unranked |
| Verification of Employment | TBD | Unranked |
| VTA SmartPass (Eco Pass) | TBD | Unranked |
| Business Card Form | TBD | Unranked |
| PeopleSoft Access Form | TBD | Unranked |
| Litigation Analyst Assignment Form | TBD | Unranked |
| Streamlining creating a new employee in PeopleSoft Process | TBD | Unranked |
| Student and In Lieu Attestations | TBD | Unranked |
| Voluntary Furlough Request | TBD | Unranked |

**Appendix C: Business Process Automation Objectives and Key Results for the previous and current quarters.**

# BPA OKRs: Q4 2021-22 (April - June)

| Objectives | Simple, Digital, Automated Work | Empowered to Change | Secure, Scalable Tech |
|---|---|---|---|
| **Key Results** | ✓ Deliver 6 automated workflows:<br>  ✓ City Council Budget Cost Estimate<br>  ✓ Muni Water Leak Notification Form<br>  ✓ PRNS Field Use Request*<br>  ✓ HR Confidentiality Statement<br>  ✓ General Employee Reimbursements<br>  ✓ HR New Hire Forms for Full-Time Hires<br>  ✓ DE-4 (State Tax Form)<br>  ■ Leave of Absence<br>■ Develop Easy Employee Onboarding Workflow: Phase I Prototype<br>✓ Complete Business Requirements Analysis for 2 workflows:<br>  ✓ Education and Professional Development Employee Reimbursement<br>  ✓ Benefits Billing/Arrears | ✓ Refreshed and reprioritized BPA Workflow Roadmap<br>■ Conduct SimpliGov Developer Training with 2 Departments and Track Community of Practice<br>✓ Develop a maintenance model and forecast for prospective BPA staffing requirements | ■ Deploy method for sustainably tracking and reporting on BPA performance measures<br>■ Deploy "Department" Permissions to Production<br>✓ Pilot SimpliSign Interactive with 1 Department<br>■ Deploy SimpliGov "Digital Dark Ages" backup solution |

✓ Complete    ■ On Track    ■ Slight Delay    ■ Major Delay

*Built by SimpliGov using Fixed Price Option

# BPA OKRs: Q1 2022-23 (July - September)

| Objectives | Simple, Digital, Automated Work | Empowered to Change | Secure, Scalable Tech |
|---|---|---|---|
| **Key Results** | ❑ Deliver 5 automated workflows:<br>  ■ Administrative Leave<br>  ■ Employee Reimbursement - Education Reimbursement (Pilot)<br>  ■ Employee Reimbursement - Professional Development Reimbursement (Pilot)<br>  ■ HR Offboarding (Notice of Separations)<br>  ■ Benefits Billing/Arrears (First Release)<br>❑ Deploy 3 workflow enhancements:<br>  ■ Email Quick Submit for Directors (Pilot/Mobile)*<br>  ■ Contracts: Add Form 700 Liaison & Clerk Review Stages*<br>  ■ Contracts: Usability Enhancements*<br>❑ Pilot Easy Employee Onboarding Workflow & Streamlining Efforts<br>❑ Complete Business Requirements for 2 workflows:<br>  ■ Viscode Request Form*<br>  ■ Employee Parking Card Application (Parking Pass)* | ❑ Update SimpliGov Tenant with Department Permissions<br>❑ Develop Citywide communications for promoting SimpliGov Fixed Price Development Option | ❑ Hire 2 Technical Resources for BPA Tech Team<br>❑ Develop SimpliGov Template for CSJ Internal Forms*<br>❑ Deploy SimpliGov "Digital Dark Ages" backup solution (carry-over)<br>❑ Deploy method for sustainably tracking and reporting on BPA performance measures (carry-over) |

*Plan to use SimpliGov professional services hours to complete this item