



# Information Technology 2023 Projects: 311, M365 and Legistar Tools

Sarah Edgerton, CIO and IT Director

# Agenda

- 311: Roadmap for a 311/Customer Relationship Management System
- M365
- Legistar Tools: Boards, Commission and Committees

# Roadmap for a 311/Customer Relationship Management System



# Scope of Project: Roadmap for a 311/Customer Relationship Management System

- Facilitating discussions with key stakeholders
- Reviewing all city agencies that would benefit from a streamlined service delivery currently provided as walk-in, phone, or on-line.
- Analyzing and assessing the impact of the existing structure to support a 311 CRM
- Assessing the City's website
- Assessing the current state of readiness for 311 implementation.
- Organizing and facilitating discussions
- Reviewing the 311 Envision Report/Roadmap and building upon its findings and recommendations.

# What is a 311/CRM System?

City of  
**SACRA  
MENTO**



Request Service



Find Answers



Explore

Search, or enter a request number



**MADISON**

# How it Works

## REPORT

You report an issue or submit a service request.

## REVIEW

We will review your request and assign it to the appropriate City department for response.

## WE'RE ON IT

Our work is underway. Estimated times to complete work may vary by type of service request.

## CHECK UPDATES

Log in or create an account to track your service request submissions.

# Key Deliverables in Report

- Propose a list of City services that should be managed through a 311 system.
- Outline a governance model and organizational structure for a 311 system.
- Recommend an appropriate facility model for a 311 system.
- Determine the required technology infrastructure to support a 311 system.
- Assist in change management associated with a 311 system implementation.
- Communications on 311 system implementation.
- Facilitating discussions on the 311 business model.
- Produce a multi-year budget forecast and phased implementation timeline for a 311 system.

# 311 Timeline

**November 2021:**

Budget  
Amendment  
Approved for  
2022

**January 2022:**

RFP posted

**June 2022:**

RFP awarded  
to Public  
Consulting  
Group (PCG)

**November**

**2022:**  
RFP Kickoff

**February -**

**May 2022:**  
RFP  
evaluation

**September**

**2022:**  
Launch of  
the project  
with PCG



# 311 Timeline: Final Stretch

**September - October 2022:**  
Internal meetings to understand the technology infrastructure

**November 2022 - March 2023:**  
Interviewed SMEs from all agencies

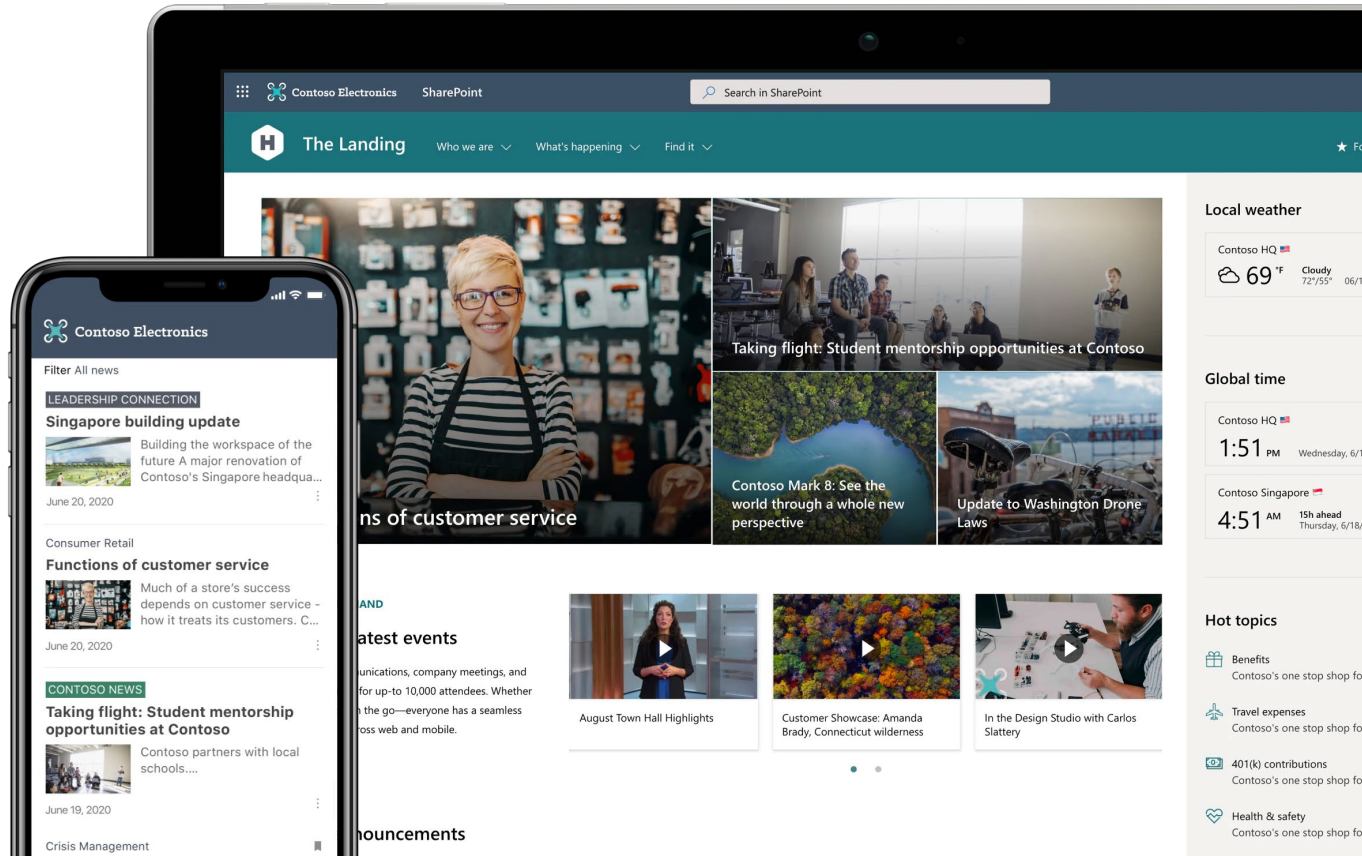
**March – June 30, 2023:** PCG writing the first draft of the report

**July – August 2023:**  
IT review draft report

**September 2023:**  
PCG submitting final report

**September – October 2023:**  
Presentations (Mayor and CCEC)

# M365 Project Update



# M365 Project Roadmap

1. Establish the M365 Tennant - Completed
2. Exchange Online (Email)
  1. Discovery Phase: Completed
  2. Design Phase: May – July 2023
  3. Prototype/Pilot Phase: July – September 2023
  4. Deploy enterprise-wide: August to December 2023
    - a. Change Migration
    - b. Training & Documentation
    - c. OneDrive once the Exchange Online license is provisioned
3. Microsoft Office & OneDrive: December 2023 to January 2023
  - a. Digital Literacy Assessment
  - b. Change Migration
  - c. Training & Documentation

# M365 Project Roadmap

3. Microsoft Office & OneDrive: December 2023 to January 2023
  - a. Digital Literacy Assessment
  - b. Change Migration
  - c. Training & Documentation

# M365 Project Roadmap

4. SharePoint Online & Teams: July 2023 – April 2024
  - a. ROTI (redundant, outdated, trivial, incomplete) analysis and cleaning up of sites: Completed
  - b. Final business analysis of every site, then will start migrating.
  - c. 35 agencies, plus sub-sites, Teams sites
  - d. Change Management
  - e. Training and documentation
5. Employeeenet moving to SP: February 2024 – July 2024

# SharePoint Data Points

- 400+ SharePoint sites that we will need to support
- 170 of these SharePoint sites are migrations where we will need to recreate them for active use. The rest are getting moved to an archive, but that still takes some interaction on our part too.
- As of May 1, there are 7,587,728 documents in our document repository (this continues to grow everyday)

# What are the benefits of M365?

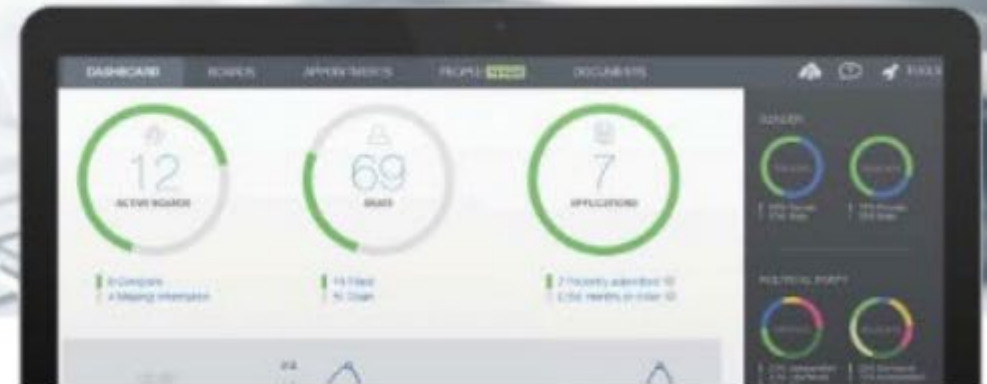
To name a few:

- Stability: Email and SharePoint
- No patching Sundays
- Improved OWA
- Robust collaboration with Teams and SP
- No more massive upgrades and deployment efforts
- Improved security with continuous upgrades

# Legistar Tools Project Update

## Boards and Commissions

Simplified board management  
for local government



Replace the MyCommitt legacy system with Boards and Commissions

CITY OF **MADISON**



# Current State

## MyCommitt Legacy System

### DETAILS

APPOINTMENT DATE:	3rd Tuesday in April
MEETS:	Monday of week preceding Council mtgs; 4:30 PM; CCB Rm. 354
STAFF:	Dave Schmiedicke
AGENCY:	Finance Department
LOCATION:	210 MLKJ Blvd., Room 406
PHONE:	(608) 266-4671
EMAIL:	<a href="mailto:dschmiedicke@cityofmadison.com">dschmiedicke@cityofmadison.com</a>
AUTHORITY:	MGO 4.02; SS 65.02,65.03,65.04
MEMBERS:	7
VOTING MEMBERS:	7
NON-VOTING MEMBERS:	0 (*)
QUORUM:	4
CHAIRPERSON:	Satya V. Rhode

### MISSION

Makes recommendations regarding budget and fiscal implications during the year. 4/18/2017: Estimates to Finance Committee per ORD-16-0

[BOARD OF HEALTH FOR MADISON AND DANE COUNTY](#)

[BOARD OF PUBLIC WORKS](#)

[BOARD OF REVIEW](#)

[BUILDING CODE, FIRE CODE, CONVEYANCE CODE AND LICENSING APPEALS BOARD](#)

## Legistar Vacancy Report

	<i>The nurse shall have experience in community health practice.</i>	
<a href="#">BOARD OF HEALTH FOR MADISON AND DANE COUNTY</a>	County Resident Residing Outside the City	8/2/2022
<a href="#">BOARD OF PUBLIC WORKS</a>	Second Alternate Two-year term. Termed-out: 4/30/2023	10/21/2021
<a href="#">BOARD OF REVIEW</a>	Adult City Resident Five-year term. Termed-out: 4/16/2024	7/17/2019
<a href="#">BUILDING CODE, FIRE CODE, CONVEYANCE CODE AND LICENSING APPEALS BOARD</a>	Professional Engineer	8/1/2021

## MS Word Application

### Have a voice in City government! Apply to be on a City board, commission or committee

Committees, commissions, and boards play a significant role in helping city staff, the Common Council and the Mayor in making decisions that affect the lives of Madison residents. The City of Madison values broad participation in these bodies and highly encourages people of color, persons with disabilities and members of other traditionally underrepresented groups to apply. Committee positions are open to City of Madison residents.

Interested in serving on a city committee?

#### It's as easy as 1 - 2 - 3

1. View the listing of [Boards, Commissions and Committees](#) to look up the [Current Vacancies](#).
2. Select committees you would like to serve on. (Please check each [committee's meeting schedule](#) to ensure you would be able to attend.)
3. Complete the [application \(MS Word\)](#) and email to [Mayor's Office](#). Then electronically submit your [Statement of Interests form](#).

**Please Note:** Nominees for appointment to a city board, commission or committee must file a [Statement of Interests](#) form with the City Clerk's Office prior to his/her name being submitted to the Common Council.

Once you've submitted your completed application, it will remain on file in the Mayor's Office and, as vacancies occur in your areas of interest, your application will be reviewed.

# Future State: Boards and Commissions

Select Language ▼ Powered by [Google Translate](#)

\* Denotes a required field

## Profile

Please note, applications are continuously accepted to the City of San Jose Boards and Commissions. The Board or Commission you select may or may not indicate there is a vacancy. Your application will remain on file for one year from the date of submission. During the year, your application may be considered for unanticipated vacancies.

First Name \*

Last Name \*

Email Address \*

Street Address \*

City \*

State \*

Postal Code \*

Are you a resident of San Jose? \*

Yes

No

What district do you live in? To verify, please click here: <https://eservices.sccgov.org/rov/?tab=dt> \*

Keep track of board appointment expirations, open and filled seats, and applications with an easy to use dashboard view.

Question applies to multiple boards

If appointed, would you be able to show proof of updated COVID-19 vaccination (inclusive of booster)? \*

Yes

No

Employer \*

Job Title \*

Current Employer Address \*

Current Employer of Spouse \*

Address of Current Employer of Spouse \*

Spouse's Job Title \*

If you or your spouse is retired and receiving a pension, please state source of pension.

## Demographics (Optional)

The demographic information you choose to provide is used for evaluating applications or making appointments regarding the composition of its Board and Commission.

Question applies to multiple boards

Ethnicity

None selected ▾

Search

American Indian or Alaskan Native  
(For example, Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, etc.)

Native American or Indigenous

African American or Black/African Descent  
(For example, Jamaican, Haitian, Nigerian, Ethiopian, Somalian, etc.)

Caucasian/White (For example, ...)

Ethnicity

None selected ▾

Asian

Filipino/a/x

Vietnamese

Hispanic/Latina/o/x or Spanish Origin  
(For example, Mexican, Puerto Rican, Cuban, Salvadoran, Guatemalan, Dominican, Colombian, etc.)

Middle Eastern (For example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, etc.)

Native Hawaiian or Other Pacific Islander  
(For example, Native Hawaiian, Samoan, Chamorro, ...)

Question applies to multiple boards

If appointed, you will be required to fill out a disclosure statement, which identifies certain of your financial interests beginning with the immediate twelve-month period prior to your appointment and annually on or before April 1 of each year thereafter. Please confirm that you have read Fair Political Practices Commission (FPPC) Form 700 Reference Pamphlet and agree to file required FPPC Form 700 Statements of Economic Interest, as required by current City Council Conflict of Interest resolution. \*

- Yes
- No

Question applies to multiple boards

Have you ever been required to file a Statement of Economic Interest (Form 700) and failed to do so? \*

- Yes
- No

Question applies to multiple boards

If yes, please explain in complete detail.

Question applies to multiple boards

Please confirm that you have reviewed and agree to comply with the San Jose Municipal Code Chapter 12.08 (Prohibition of Gifts), City of San Jose Ethics Policy (City Policy Manual 1.2.1), and City of San Jose Gift Policy (City Policy Manual 1.2.2). \*

- Yes
- No

# First Project: Replacing MyCommitt Timeline

**April 2023:**  
Contract Completed

**August 2023**  
Project Kick-Off

**January – March 2024:**  
Project Implementation

# What's Next?

## Collaboration Tools that we would like to explore:

- Exploring the rest of the Gov Meeting and Agenda Suite of tools:
  - Real-time agenda editing and collaboration
  - Digital Minutes
  - Instant Digital Vote Capture
  - iLegislate – Review Agenda Packets in a mobile friendly view