

Memorandum



DATE April 9, 2009

TO The Honorable Mayor and Members of the City Council


SUBJECT **The City Secretary's Office Technology Plan**

On November 19, 2008, the City Council reviewed my performance for the fiscal year 07-08 which represented my third year as the City Secretary. I am very appreciative of the opportunity to work with City Council during the past three years. Since my appointment, the discussions and meetings, individually and as a group, the email communications, your inquiries and offers of assistance have been most beneficial to me in developing my work plan. During this evaluation process, I defined several areas of concerns regarding technology and budget issues. As requested, I have developed a timeline for a technology plan to assist the City Secretary's Office to operate more efficient, effective, and economical.

I am submitting this Technology Plan for the 09 – 10 budget fiscal year. The plan provides a point of reference and outlines my goals, objectives and vision for the Office of the City Secretary technology resources. I believe the resources listed in this plan will assist in fulfilling our technology needs for the following areas:

- Archives
- Board and Commission Support
- Customer Service Support
- City Council Support
- Elections Support
- Records Management Support

I look forward to briefing you on Wednesday, April 15, 2009

for 
Deborah A. Watkins
City Secretary

City Secretary Technology Plan

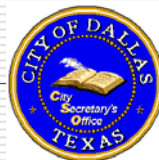
City Council Briefing
April 15, 2009



City Secretary's Office Mission

The Office of the City Secretary is committed to providing quality customer service to Citizens, City Councilmembers and City Departments, and producing positive outcomes for the following areas of responsibilities:

- Archives*
- Boards and Commissions*
- Customer Service*
- City Council Support*
- Elections*
- Records Management*



ARCHIVES

Responsibility:

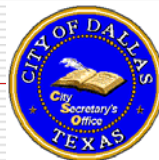
- Manage, coordinate, maintain, preserve, and provide access to archives for purposes of research and viewing.

Issues:

- Funding of microfilming contract to preserve official City of Dallas records. Un-microfilmed records are at risk of loss due to natural disasters.

Technology Resource:

- Seek full funding for the microfilming contract to preserve official City of Dallas Records.



ARCHIVES

Strategy:

- Seeking funding through the budget for Outcomes Process and meet with City Manager and Council to discuss budget needs.

Performance Measure:

- Complete microfilming of records from the 1970s and earlier.

Cost:

- \$68,000

Timeline:

- One (1) Year (October 1, 2009 – September 31, 2010)

*Microfilm backup copies are the only proven stable reproduction method



Boards and Commissions

Responsibility:

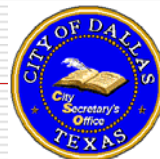
- Manage and process Boards and Commissions nominations/re-nominations, appointments and serve as resource for board members and departments. Support team for Ethics Advisory Commission, Permit and License Appeal Board and filing of Financial Disclosure Statements.

Issues:

- Consistent and timely reporting of board information relating to nominees/re-nominees status.
- Provide visibility for boards and commissions to stimulate citizens to volunteer.
- Create a database for citizens to apply for boards and commissions positions.
- Acquire long-term technical support (CIS Department) for the system that maintains nominee/re-nominee and appointee information.
- Improve efficiency and decrease costs.

Technology Resources:

- Board and Commission Applicant Tracking System



Boards and Commissions

□ *Strategy:*

- Option 1: Replace the nominee tracking software (Fox Pro) with a system that will enable faster completion of nominee background checks, customized reports to City Council, reduce dependence on hardcopy documentation and further automate an important function within the City Secretary's Office.
- Option 2: Replace the nominee tracking software (Fox Pro) with NEOGOV, the applicant tracking system the City of Dallas currently uses for employment purposes. This will enable faster completion of nominee background checks, customized reports to City Council, reduce dependence on hardcopy documentation and further automate an important function within the City Secretary's Office. This system will be the database system for citizens to apply for boards and commissions positions with the City.

□ *Performance Measure:*

- Option 1 & 2: (1) Reduction in the number of days needed to complete background checks; (2) Streamlining of the background check process; (3) Production of customized reporting to City Council on nominees; and (4) Significant Reduction in mailing and copying costs.



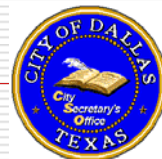
Boards and Commissions

Cost:

- Option 1: \$100,000 (estimate)
- Option 2: No Cost to the City

Timeline:

- Option 1: Six (6) Months (October 1, 2009 – March 30, 2010)
- Option 2: Six (6) Months (April 1, 2009 – August 31, 2009)



City Council Support

Responsibility:

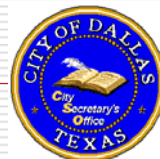
- Develop and direct the implementation of City Secretary's Office vision and mandates through a knowledgeable and well-trained staff. Recommend a budget that will assist the department in providing training and resources, coordinating continued updates of policies and procedures, preparation of minutes, addressing open records and special project requests from citizens, City Councilmembers and City departments.

Issues:

- Research new technology that will enhance the current filing system to provide immediate access to information
- Ensuring that Council meetings are conducted efficiently and effectively

Technology Resource:

- Speaker Queuing System



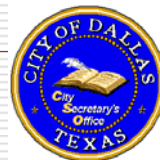
City Council Support

- *Strategy:*
 - Partner with the Communication and Information Services Department to develop a Speaker Queuing System for Council Meeting Rooms and offsite locations.

- *Performance Measure:*
 - Better access to system by Councilmembers when making comments or asking questions.
 - Streamline “request to speak” system ensuring an efficient and effective process.
 - Develop a mobile system to move to various locations through the City.
 - Replace an obsolete system that currently has no backup.

- *Cost:*
 - \$189,000 (estimate)

- *Timeline:*
 - Six (6) Months (October 1, 2009 – March 30, 2010)

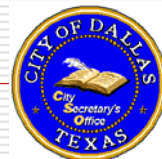


CUSTOMER SERVICE

- *Responsibility:*
 - Provide responsive customer service to citizens, Councilmembers and City departments that reflects the mission of the organization.

- *Issues:*
 - Cross-training of entire staff
 - Operating with limited staff

- *Technology Resource:*
 - Electronic Public Meeting Notice Kiosk



CUSTOMER SERVICE

Strategy:

- Purchase one electronic Public Meeting Notice Kiosk to access remotely without having to come into the office after hours.

Performance Measure:

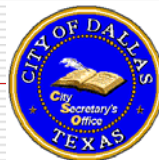
- 100% compliance with the Open Meetings Act. (72 hour Notice)

Cost:

- \$10,000 (estimate) (Use current fiscal year savings from vacant position that is currently frozen)

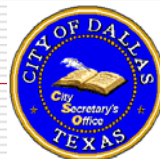
Timeline:

- Four (4) Months (April 1, 2009 – September 31, 2009)



ELECTIONS

- *Responsibility:*
 - Manage the City of Dallas elections process and contract.
- *Issues:*
 - Certify petitions for City Council Candidacy or recall and/or an initiative or referendum.
 - Inform Councilmembers and candidates of petition outcomes in a more efficient and effective manner and reduce the cost of hiring temporary employees.
- *Technology Resource:*
 - Petition Verification System



ELECTIONS

Strategy:

- Purchase a Petitions System through the Request for Offers Process.

Performance Measure:

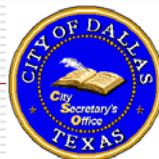
- Ensuring an efficient, effective, and transparent process to verify signatures for petitions.

Cost:

- \$100,000 (estimate)

Timeline:

- Six (6) Months (October 1, 2009 – September 31, 2010)



RECORDS MANAGEMENT

Responsibility:

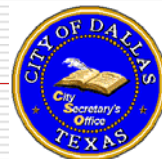
- Manage onsite records center and commercial storage contract for City records. Assist departments in developing file needs assessment, record retention schedules, ongoing training for department's Record Coordinators and quality control review of City council action prior to distribution.

Issues:

- More efficient and effective system to allow internal and external access to the City's official records, automated storage, and provides an effective retention system.

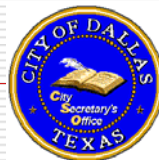
Technology Resource:

- Document Management System



RECORDS MANAGEMENT

- *Strategy:*
 - Purchase a Document Management System through the Request for Offers Process.
- *Performance Measure:*
 - Ensuring the longevity and producing an efficient, effective process of maintaining City records for the public and City use.
- *Cost:*
 - 1.9M (estimate)
- *Timeline:*
 - Two (2) Year (October 1, 2009 – September 31, 2011)



Budget & FTE Analysis

Division	FY 07 -08 Budget	FY 07-08 FTEs	FY 08 -09 Budget	FY 08 -09 FTEs	POG FY 09 – 10 Budget	Proposed FY 09 -10 FTEs
Archives	228,300	2	178,443	2	119,249	1
Boards & Commissions	349,256	5	336,585	5	257,770	3
City Council Support	546,973	4	644,135	4	626,339	3
Customer Service	316,589	6	308,715	6	300,993	5
Elections	82,253	1	1,081,880	1	1,083,980	1
Records Management	531,786	5	461,933	4	364,855	3
Grand Total (Exclude Elections)	1,972,904	22	1,929,811	21	<u>1,669,206</u>	<u>15</u>

The City Secretary's Office has one employee on Military Leave (16 FTEs)

Recommendation

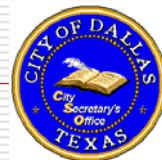
(Systematic approach to funding for the City Secretary's Office to update it's technology resources)

Prioritized by importance to the management of the City Secretary's Office.

- Archives
 - *Restore Full Funding for Microfilming*
- Records Management
 - *Document Management System*
- Elections
 - *Petition Verification System*
- Boards and Commissions
 - *System Boards and Commissions Applicant Tracking*
- Customer Service
 - *Electronic Public Meeting Notice Kiosk*
- City Council Support
 - *Speaker Queuing System*

Prioritized based upon the current budget concerns that will least effect the budget over a two year period.

- Boards and Commissions
 - *Boards and Commission Applicant Tracking System (Option 2 - NEOGOV)*
- Customer Service
 - *Electronic Public Meeting Notice Kiosk*
- Archives
 - *Restore Full Funding for Microfilming*
- Boards and Commission
 - *Boards and Commissions Applicant Tracking system (Option 1)*
- Elections
 - *Petition Verification System*
- City Council Support
 - *Speaker Queuing System*
- Records Management
 - *Document Management System*



Questions

