

F.U.# 150418
Received in Committee
7/22/15
F.W.



San Francisco Business Portal

Budget
and
Finance
Sub-Committee

July 22, 2015

Starting a Business in SF



Goal

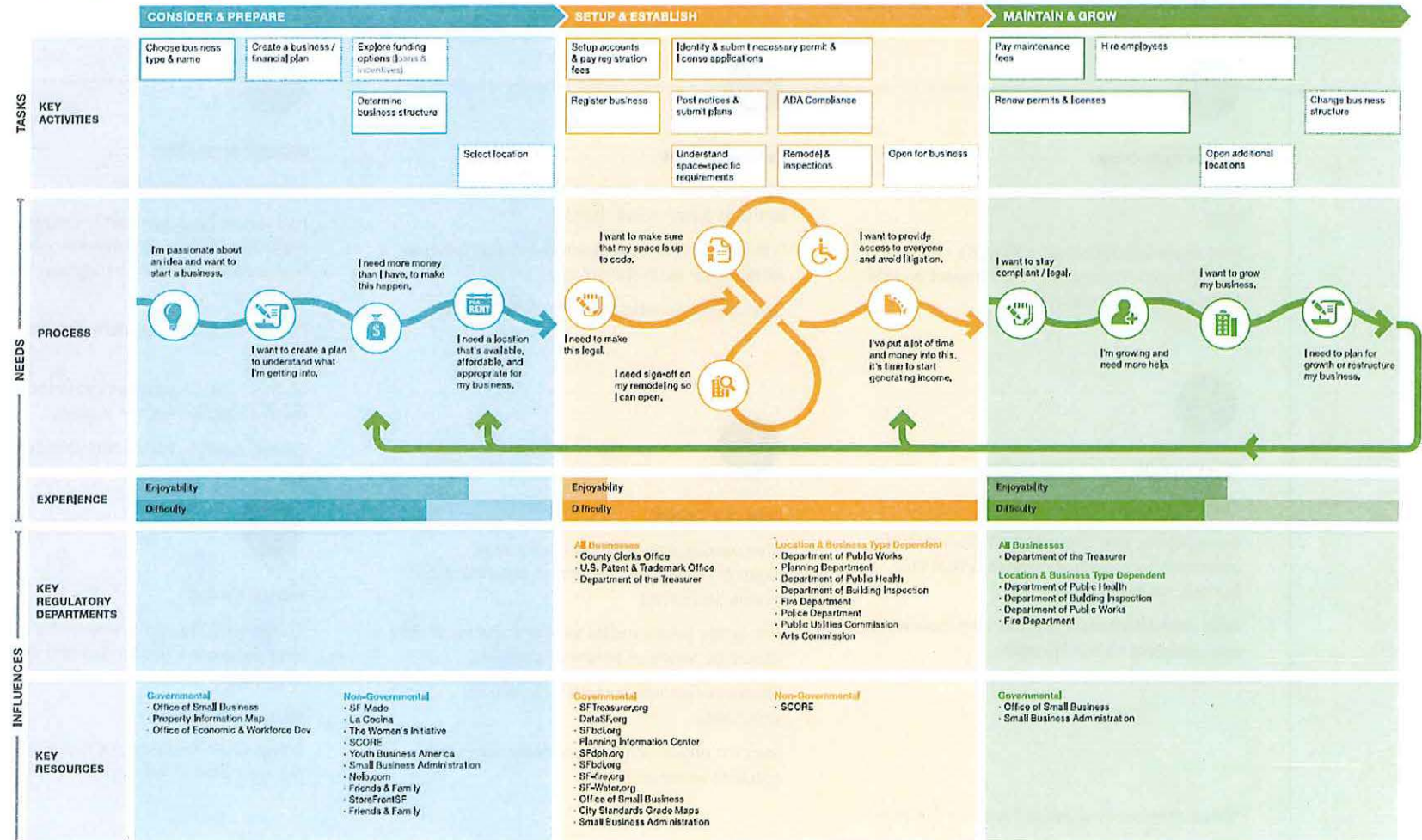
Our BAHG (Big Audacious Hairy Goal) is to create the first stop “for everything business in San Francisco” — an **integrated, comprehensive, scalable** digital Business Portal that supports businesses in San Francisco, from their **inception** through their **growth**, helping entrepreneurs during the **entire life cycle of their businesses**.

User Research

We began with qualitative research focused on both internal users (City staff who interact with business owners), and external users (San Francisco business owners at every stage of the lifecycle of a business).



Findings (customer journey)



Design Principles

1

Do the right thing.

Set clear expectations and make the process clear.

Find opportunities to show that the City cares about the businesses, and their impact on others (employees, community).

4

Treat constituents as customers.

Treat customers like people, not numbers.

Demonstrate that users/customers needs are important by providing responses that are human, not bureaucratic.

Help users/customers feel like their businesses are important to San Francisco.

2

Curate content.

Make the content relevant to a variety of business types or industries.

Provide context for customers or users based on where they are in the process.

Give options to help make the right choices.

5

Dole out delight.

Give users/customers one continuous experience, even in the face of unanticipated events and issues.

Anticipate needs and let people know what they should be aware of before it happens.

Eliminate redundancies and streamline processes.

Look for opportunities to dematerialize, make efficient, make delightful.

3

Make it accessible.

Provide clear instructions.

Use simple language that is easy to understand, regardless of one's motivation, educational background, linguistic background or level of business expertise.

Design uncluttered experience, interface, forms, and signage.

Connect users/customers to resources and people at many points during the journey.

Ensure usability across multiple devices.

6

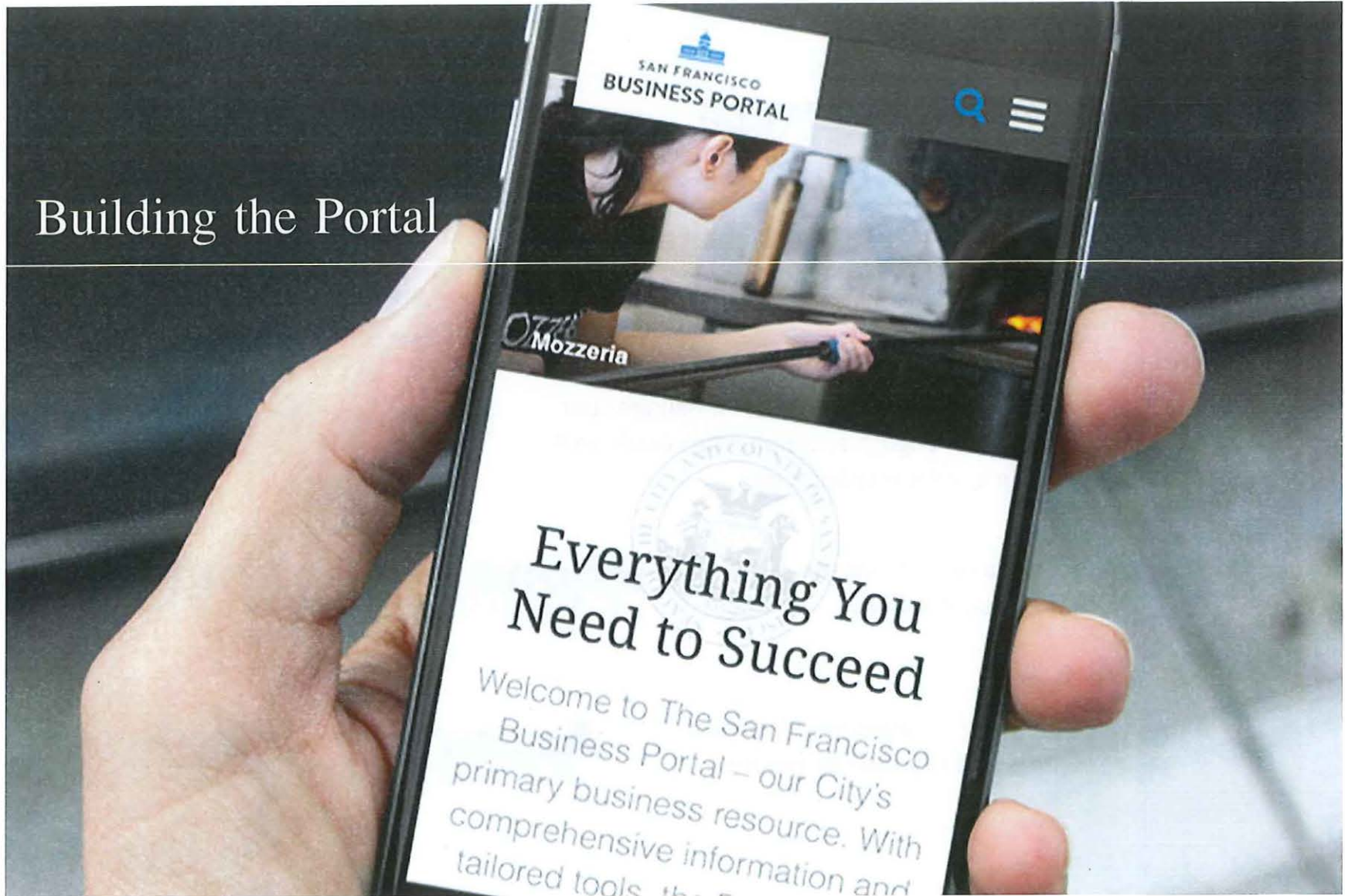
Increase trust.

Create visibility into where in the process or on whose desk paperwork has landed and when it will be processed.

Be accountable.

Admit when mistakes are made, and don't penalize business owners unnecessarily.

Building the Portal



Building the Portal

Collected & consolidated information from:

18 departments & **400+** permits

Wrote Portal content in simple language that reads well in English and translates easily to 9 languages, with emphasis on:

Spanish & Chinese
español 中文

Created a responsive site design that can be used on:

Phone & Desktop & Tablet
Phone Desktop Tablet

Continually engaged with business owners and city staff to ensure:

Accuracy & Delight
Accuracy Delight

Pre-launch

- In-depth user testing
- Users described the site as: professional, useful, simple, easy, clear, uncluttered, accessible, engaging, beautifully designed, comprehensive
- Stress testing & infrastructure
- 200K simultaneous hits
- Soft launch: September, 2014

Full Launch

November, 2014

- Promotional video (pro-bono by Headland)
- Postcard handout
- Cross-departmental links (Sfgov.org, 311, TTX, Planning, DBI, etc.)
- Email (Merchants Associations, Neighborhood Economic Development Organizations (NEDOs), etc.)
- Trainings sessions (311, OSB, Nonprofits, etc.)
- Social Media
- MUNI Bus Ads

Post Cards

Front Version One

DEPARTMENT OF

*helping you
start your
business*

 **SAN FRANCISCO BUSINESS PORTAL**

You're an ideas person. We can help with the rest.

The San Francisco Business Portal is the go-to resource for starting, running, and growing a business in our City.

businessportal.sfgov.org

Front Version Two

IDEA → *You've got this.*

PLAN

FINANCES

PERMITS

TAXES

STRUCTURE

REGISTRATION

COMPLIANCE

LICENSES

RESOURCES

DEADLINES

REQUIREMENTS

We've got the rest.

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Back

 **SAN FRANCISCO BUSINESS PORTAL**

The San Francisco Business Portal is the ultimate resource for starting, running, and growing a business in our City. With comprehensive information and tailored tools, the portal helps you navigate the process and quickly learn what it takes to be compliant.



Start

Starting a business can be challenging. Being prepared and well-informed can help.



Manage

Avoid bumps in the road with important deadlines; tax, legal, and accounting assistance; and more.



Grow

It's time to expand and the Portal will help you take your business to the next level.



Starter Kits

Every great idea starts somewhere. Starter kits explain how to turn an idea into a successful business with step-by-step guides, required permits, and helpful resources.



Permits & Licenses

Find permits, licenses, and forms that apply to your business. We catalogued every City, State, and Federal permit and made them searchable.

businessportal.sfgov.org

Outcomes

More than 10x as many users on a daily basis as the City's previous online permitting information option. (10 users/day vs. 117 users/day)

Responses through our Give Feedback feature and mentions on social media have highlighted the Portal for “**defying typical govtech**”, being “**a pleasure to explore**”, making it “**easier to do business in San Francisco**”, and even, in the words of one SF business owner: “**doing us a solid.**”

City, State, and Federal Officials have reached out to learn about the SF Business Portal. We now **share our approach and lessons** learned through the **Retrospective**: businessportal.sfgov.org/retrospective-2014.

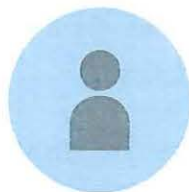
Analytics and feedback now inform decisions related to SF's business community and help us improve the Portal's digital offerings.

Analytics (since launch)



14.5K

Page Views per Month



3.5K

Users per month



9%

Mobile Users



3%

Tablet Users



39%

San Francisco Users



8%

Other Bay Area Users



26

Office of Small Business Cases Generated*

*Based on Q3 Data

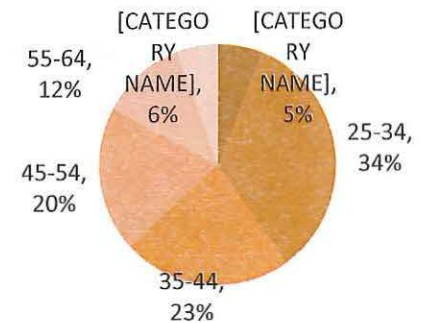
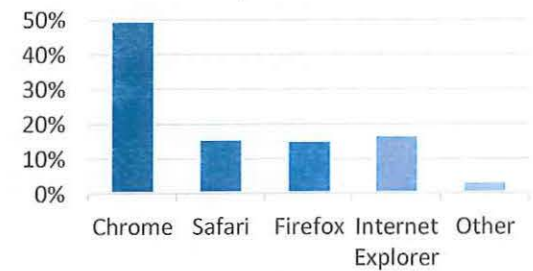


159

311 Small Business-Related Cases solved*

*Based on Q3 Data

Browsers



Age Breakdown

Press + Awards



San Francisco
Chronicle

GOVERNMENT TECHNOLOGY
SOLUTIONS FOR STATE AND LOCAL GOVERNMENT IN THE INFORMATION AGE



CA Governor's Office of
Business and Economic
Development
Breaking Barriers to Doing
Business Award

SAN FRANCISCO
Business Times



Data-Smart
City Solutions



HARVARD Kennedy School
ASH CENTER
for Democratic Governance
and Innovation

FAST COMPANY

CIO100
SYMPOSIUM & AWARDS CEREMONY

CENTER FOR
DIGITAL
GOVERNMENT

So, what have we been doing since launch?

Technology Enhancements

- Develop analytics program and identify KPI's for potential site improvements
- Phase II Features
 - SaaS Platform
 - Online Forms
 - Profile Creation
 - Adjustable Checklists
 - Data Storage and Delivery
 - Data Pre-Fill

Portal Maintenance

- Update content as legislation and needs change, especially permits and starter kits
- Create new content (Starter Kits, TTX New Biz Registration, Gross Receipts Tax, etc.)
- Audit all permit forms
- Find and repair broken links
- Install Drupal security updates as necessary
- Create Operations & Training Manual

Process Streamlining

- Collaboration with Controller's Office to map restaurant permit process
- More restaurants per capita than any U.S. city¹
- \$3.2b in consumer spending²
- \$30m in sales tax for SF²
- 19,000 local jobs³
- ~230 new restaurants register in SF each year
- 24 individual restaurant permits
- 14 City, State, and Federal departments involved

¹ See Bloomberg Visual Data: Most Eateries per Capita: U.S. Cities at <http://www.bloomberg.com/visual-data/best-and-worst/most-eateries-per-capita-us-cities>. The statistics is specific to San Francisco-Oakland-Fremont, CA MSA, which includes San Francisco, Alameda, Marin, Contra Costa, and San Mateo County

² The Economic Impact of San Francisco's Nightlife Businesses at <http://sfcontroller.org/Modules/ShowDocument.aspx?documentid=2953>, p. 9 and 11

³ Ibid, p. 8 and 20

Next Steps (Portal & Streamlining)

Process Streamlining

- Map out permit application processes for **other business sectors**
- Integrate all permitting departments processes into a **unified plan**
- Implement recommended streamlining measures **between and within departments**
- Plan for future integration of online and offline processes with **physical one-stop center**

Technology Enhancements

- Work with TTX, Assessor's Office, County Clerk to create **core 'new business registration'** permit applications and workflows
- Integrate permit forms with **Digital/Electronic Signature** provider
- Implement **ePayment** functionality for license/permit fees
- Recommend and/or obtain/develop middleware to **fully integrate City databases**

Portal Maintenance

- Continue maintaining the Business Portal and make plans to **operationalize its maintenance**

Other Projects

- Serve on advisory board/consult for **Mayor's Housing Portal**
- **Consult on digital projects** for HSS, Department of Youth, Children & Families, Film Commission, Arts Commission
- Develop **Public Experience Strategy**

The Big Picture

Our ultimate goal is to give San Franciscans a single, continuous experience across City departments, thereby making our local government more responsive to its citizens.

We focus on bringing government to the people by creating exemplary online and offline services.

The possibilities are endless.

Supporters

Sponsoring Departments



City & County of San Francisco

Office of
the Mayor



City & County of San Francisco

Department of
Technology



SAN FRANCISCO
Office of Economic and
Workforce Development



City & County of San Francisco

Office of Small
Business

Partners

Arts Commission	Office of Contract Administration
Board of Supervisors	Office of the Assessor-Recorder
Committee on Information Technology	Office of the Controller
Department of Building Inspection	Office of the County Clerk
Department of Public Health	Office of the Treasurer and Tax Collector
Department of Public Works	Planning Department
Department of the Environment	Police Department
Entertainment Commission	Public Utilities Commission
Fire Department	Small Business Commission
Mayor's Office of Disability	Tomorrow Partners*

*Tomorrow Partners was the design firm chosen to partner with the City's internal team in building the San Francisco Business Portal.

Supporters[^]

Cal Insurance & Associates	Mozzeria
Casa Sanchez	R Bar
Dodo Case	Rickshaw Bagworks
Everest Waterproofing & Restoration	Roots
Extranomical	San Franpsycho
Fourbarrel	Square
Headland Films	Urban Bazaar
Hearth Coffee	Wise Sons Jewish Deli

[^] No goods or services were provided in exchange for being interviewed or featured in the Portal.

San Francisco Business Portal Restaurant Permit Process Mapping



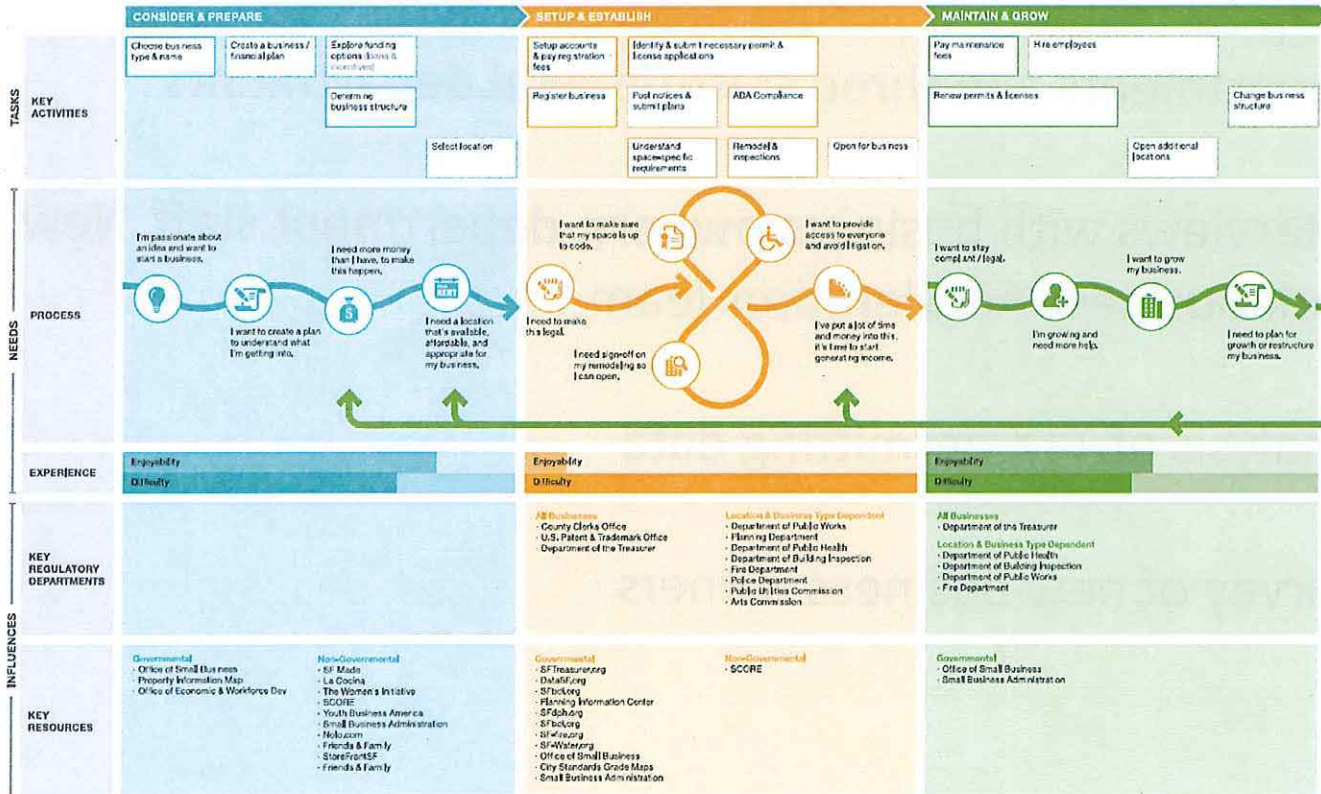
CITY & COUNTY OF SAN FRANCISCO

Office of the Controller
City Services Auditor, City Performance

July 22, 2015



Customer Journey



What we did



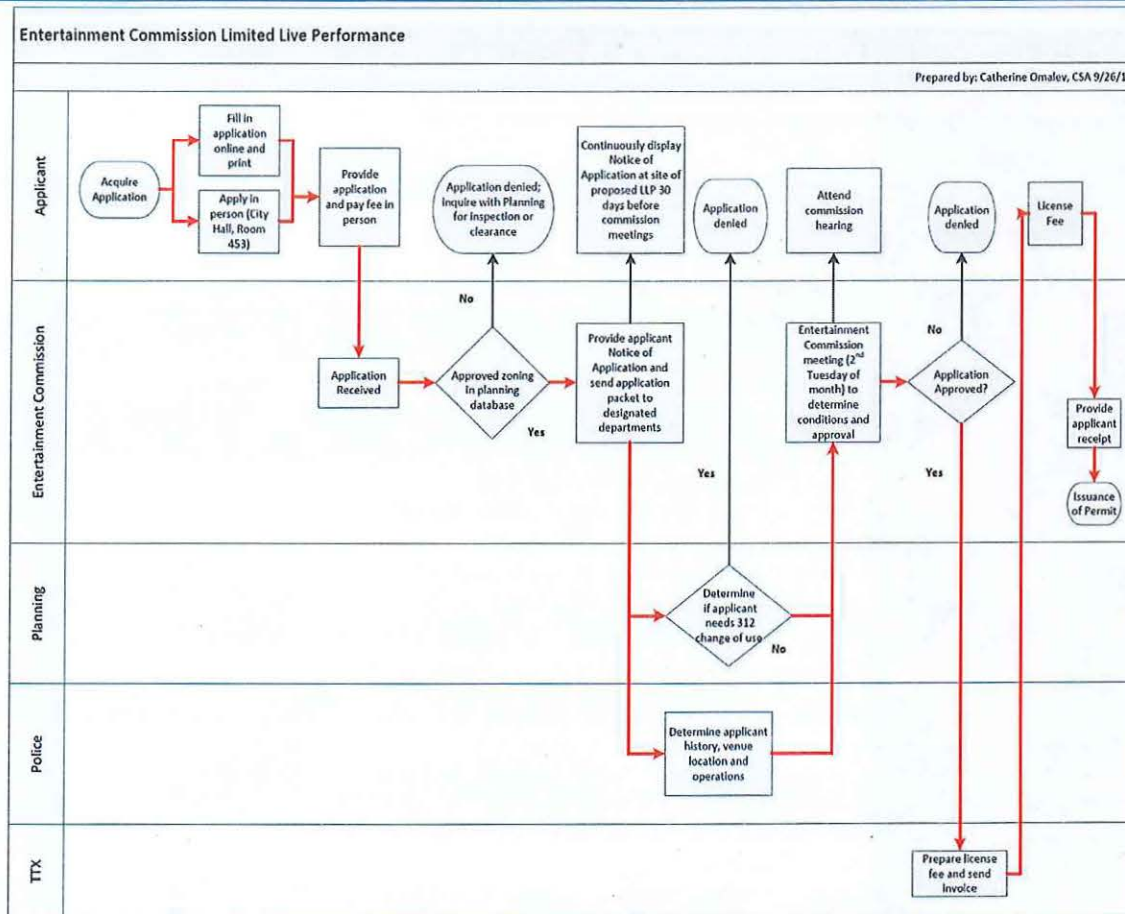
- Map 22 restaurant permit processes across 11 CCSF departments and three state/federal departments
- Interviews with business owners, department staff, New York Business Acceleration Team
- Analysis of TTX permitting data
- Survey of new business owners

Departments and permits mapped

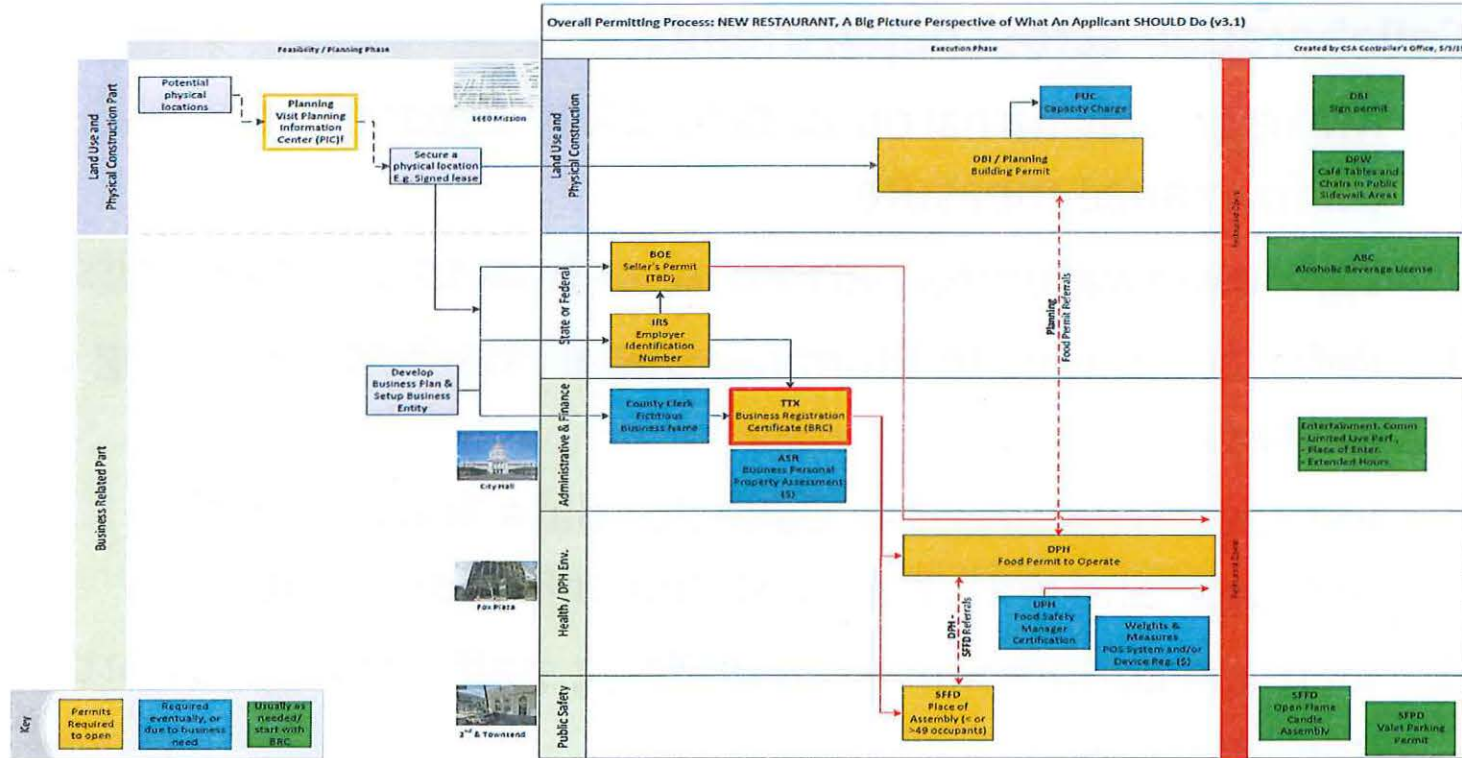


Department	Permits reviewed
Assessor	Business personal property (new business registration)
Building Inspection	<ul style="list-style-type: none"> - Building permit - Sign
Clerk	Fictitious business name
Entertainment Commission	<ul style="list-style-type: none"> - Extended hours - Limited live performance - Place of entertainment
Fire	<ul style="list-style-type: none"> - Place of assembly - Open flame
Planning	Initial, high-level review of land use and building requirements
Police	<ul style="list-style-type: none"> - Valet parking - Liquor license
Public Health	<ul style="list-style-type: none"> - Automated point of sale registration - Certificate of sanitation/Food permit to operate - Food safety manager certification - Weighing or measuring device registration
Public Works	Café tables and chairs
Public Utilities Commission	Water/wastewater capacity change assessment
Treasurer/Tax Collector	Business registration certificate
Alcoholic Beverage Control*	Liquor license
Board of Equalization*	Seller's permit
Internal Revenue Service*	Employer Identification Number

Sample permit process



Overall restaurant process



Controller's Office, Restaurant Permit Process Mapping

Recommendations – 1



Collaboration across departments

1. Make permit turnaround time a key department performance measure
2. Link low-awareness permits to critical-to-open permits
3. Refer customers to Planning Department at beginning of process
4. Improve Treasurer-Tax Collector data linkages with Assessor and with consolidated billing departments
5. Increase co-location of permitting staff, moving toward a one-stop shop

Recommendations - 2



Applicant focus

6. Allow more applications to be submitted online
7. Enhance department websites to address customer needs
8. Streamline payment methods

San Francisco Business Portal Restaurant Permit Process Mapping



CITY & COUNTY OF SAN FRANCISCO

Office of the Controller
City Services Auditor, City Performance

July 22, 2015

City and County of San Francisco

Office of Small Business

Budget and Finance Committee

Streamlining the Restaurant Business Permitting
Process Hearing

**SMALL BUSINESS ACCELERATION TEAM
(SBAT)**

July 22, 2015

SMALL BUSINESS ACCELERATION TEAM FOOD AND BEVERAGE SECTOR

- Estimate ~230 restaurants annually go through the permit process. The vast majority will open one to two restaurants in their business career.
- Providing support to this sector as they navigate the 24 different permits from 11 city departments, and 3 state or federal departments is a smart and important economic development program to establish particularly in a time when real estate is at premium and very little room to negotiate.
- The 2015/2016 Budget authorized the establishment of the Small Business Acceleration Team.
- The Small Business Acceleration Team is a joint partnership with Office of Economic and Workforce Development, Office of Small Business, Department of Building and Inspection, Department of Public Health, Planning Department, Public Utilities Commission and the Fire Department.

SMALL BUSINESS ACCELERATION TEAM FOOD AND BEVERAGE SECTOR

Dedicated “Client Service” Manager

- At the core the Small Business Acceleration Team is the Client Service Manager.
- The Client Service Manager will own the businesses’ experience as the business moves across departments. This includes:
 - evaluating individual needs,
 - educating business owners about the process,
 - reviewing plans and permit applications,
 - coordinating services, and scheduling inspections.
- By involving Case Managers throughout, business owners have an expert partner, who can guide them through each permit process and help determine realistic schedules.

SMALL BUSINESS ACCELERATION TEAM FOOD AND BEVERAGE SECTOR

Create a Small Business Acceleration Center at 1660 Mission:

- Many permitting departments (DBI, Planning, PUC, PDH, DPW and Fire) already sit together at DBI's Over the Counter Permit center on the 5th floor of 1660 Mission.
- The Client Service Manager will be co-located at 1660 Mission.
- This will ensure applicants move swiftly and in the right direction through the process. Plus save both time and money, and dramatically reduce unnecessary frustrations and avoid potential pitfalls.
- This will save time for the small business owners and allow for real-time resolution of interagency issues.

SMALL BUSINESS ACCELERATION TEAM FOOD AND BEVERAGE SECTOR

Case Management Model:

- Permitting Departments will designate staff leads to sit on the Small Business Acceleration team.
- The Client Service Manager is charged with convening department designated leads and guiding restaurants through the entire process, reporting status updates to senior staff of the departments that are part of the SBAT.

Referral and Coordination:

- The Client Service Manager will integrate with and receive referrals from OEWD business service staff including Office of Small Business Counselors, the Jobs Squad, and the Small Business Development Center, and partnering organizations such that the GGRA and the Economic Development Organizations.

SMALL BUSINESS ACCELERATION TEAM FOOD AND BEVERAGE SECTOR

Single Point of Contact provides Increased Accountability:

- The Client Service Manager becomes the single point-of-contact for permit tracking, appointment scheduling, and overall facilitation of the permitting process.

SBAT provides an opportunity for the relevant departments to work together improve coordination = increased small business satisfaction:

Incorporate Lessons Learned into Project Chess:

- A one stop permit center is included in Project Chess. The Small Business Acceleration programs serves as the perfect pilot, for the “One-Stop Permitting Center”. It will also provide invaluable data and insights for process improvements as part of the broader business streamlining process.