

File No. 130674

Committee Item No. 7

Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee

Date: 07/24/2013

Board of Supervisors Meeting

Date: _____

Cmte Board

- | | | |
|-------------------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Motion |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Resolution |
| <input type="checkbox"/> | <input type="checkbox"/> | Ordinance |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Digest |
| <input type="checkbox"/> | <input type="checkbox"/> | Budget and Legislative Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Youth Commission Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Introduction Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/> | <input type="checkbox"/> | MOU |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Grant Information Form |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Grant Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Subcontract Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Contract/Agreement |
| <input type="checkbox"/> | <input type="checkbox"/> | Form 126 – Ethics Commission |
| <input type="checkbox"/> | <input type="checkbox"/> | Award Letter |
| <input type="checkbox"/> | <input type="checkbox"/> | Application |
| <input type="checkbox"/> | <input type="checkbox"/> | Public Correspondence |

OTHER (Use back side if additional space is needed)

<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

Completed by: Victor Young Date July 19, 2013

Completed by: Victor Young Date _____

1 [Accept and Expend Gift - Enterprise Zone Hiring Tax Credit Web Application Development -
2 \$16,000]

3 **Resolution authorizing the Office of Economic and Workforce Development to**
4 **retroactively accept and expend an in-kind gift valued at \$16,000 from Firmstep for the**
5 **development of the web-based Enterprise Zone hiring tax credit application.**

6
7 WHEREAS, The Enterprise Zone hiring tax credit is a valuable economic development
8 tool and valuable income tax saving for San Francisco businesses located in the designated
9 zone; and

10 WHEREAS, The process by which businesses applied for the hiring tax credit was
11 paper based and therefore carried high costs in paper, copying services, mailing and
12 document archival costs encountered by both the business clients and the Office of Economic
13 & Workforce Development; and

14 WHEREAS, Processing the forms and supporting documentation submitted by
15 employers to establish eligibility for the San Francisco Enterprise Zone hiring tax credit is
16 established under California Administrative Code Title 25, Division 1, Chapter 7, Subchapter
17 21, Enterprise Zone Program; and

18 WHEREAS, The Office of Economic & Workforce Development is authorized to charge
19 a fee of \$80 for each form and supporting documentation submitted by an employer to
20 establish eligibility for the San Francisco Enterprise Zone hiring tax credit established under
21 California Administrative Code Title 25, Division 1, Chapter 7, Subchapter 21, Enterprise Zone
22 Program; and

23 WHEREAS, The Office of Economic & Workforce Development recommends that the
24 San Francisco Board of Supervisors retroactively accept and expend the in-kind gift, valued at
25 \$16,000; and

1 WHEREAS, The City recognizes the generosity of Firmstep with sincere appreciation;
2 now, therefore, be it

3 RESOLVED, That the Board of Supervisors approves the Gift and authorizes the Office
4 of Economic & Workforce Development Director to retroactively accept and expend the in-
5 kind Gift, valued at \$16,000, from Firmstep to develop and customize a web-based application
6 for the San Francisco Enterprise Zone hiring tax credit.

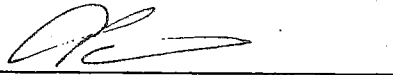
7
8 Recommended:

9
10 

11 Director, Office of Economic & Workforce Development

12
13
14 Approved: 

15 Mayor

16
17 Approved: 

18 Controller

TO: Angela Calvillo, Clerk of the Board of Supervisors
FROM: Todd Rufo, Director, Office of Economic and Workforce Development
DATE: June 24, 2013
SUBJECT: Accept and Expend Resolution for Subject Grant
GRANT TITLE: Enterprise Zone hiring tax credit web application development, \$16,000

Attached please find the original and 4 copies of each of the following:

- Proposed grant resolution; original signed by Department, Mayor, Controller
- Grant information form, including disability checklist
- Grant budget: Firmstep Proposal and In-Kind Confirmation Letter
- Grant application
- Grant award letter from funding agency
- Other (Explain):

Special Timeline Requirements:

Departmental representative to receive a copy of the adopted resolution:

Name:

Phone:

Interoffice Mail Address:

Certified copy required Yes

No

(Note: certified copies have the seal of the City/County affixed and are occasionally required by funding agencies. In most cases ordinary copies without the seal are sufficient).

File Number: _____
(Provided by Clerk of Board of Supervisors)

Grant Resolution Information Form
(Effective July 2011)

Purpose: Accompanies proposed Board of Supervisors resolutions authorizing a Department to accept and expend grant funds.

The following describes the grant referred to in the accompanying resolution:

1. Grant Title: Enterprise Zone hiring tax credit web application development
2. Department: Office of Economic and Workforce Development
3. Contact Person: Todd Rufo Telephone: (415) 554-5694
4. Grant Approval Status (check one):
 Approved by funding agency Not yet approved
5. Amount of Grant Funding Approved or Applied for: \$16,000 (in-kind)
- 6a. Matching Funds Required: NA
b. Source(s) of matching funds (if applicable): NA
- 7a. Grant Source Agency: Firmstep
b. Grant Pass-Through Agency (if applicable): n/a
8. Proposed Grant Project Summary: Develop and customize a web-based application for the San Francisco Enterprise Zone hiring tax credit program.
9. Grant Project Schedule, as allowed in approval documents, or as proposed:
Start-Date: n/a End-Date: n/a
- 10a. Amount budgeted for contractual services: n/a
b. Will contractual services be put out to bid? n/a
c. If so, will contract services help to further the goals of the Department's Local Business Enterprise (LBE) requirements?
d. Is this likely to be a one-time or ongoing request for contracting out? n/a
- 11a. Does the budget include indirect costs? Yes No
b1. If yes, how much?
b2. How was the amount calculated?
c1. If no, why are indirect costs not included?
 Not allowed by granting agency To maximize use of grant funds on direct services
c2. If no indirect costs are included, what would have been the indirect costs?

12. Any other significant grant requirements or comments:

****Disability Access Checklist***(Department must forward a copy of all completed Grant Information Forms to the Mayor's Office of Disability)**

13. This Grant is intended for activities at (check all that apply):

- | | | |
|--|---|---|
| <input checked="" type="checkbox"/> Existing Site(s) | <input checked="" type="checkbox"/> Existing Structure(s) | <input checked="" type="checkbox"/> Existing Program(s) or Service(s) |
| <input type="checkbox"/> Rehabilitated Site(s) | <input type="checkbox"/> Rehabilitated Structure(s) | <input type="checkbox"/> New Program(s) or Service(s) |
| <input type="checkbox"/> New Site(s) | <input type="checkbox"/> New Structure(s) | |

14. The Departmental ADA Coordinator or the Mayor's Office on Disability have reviewed the proposal and concluded that the project as proposed will be in compliance with the Americans with Disabilities Act and all other Federal, State and local disability rights laws and regulations and will allow the full inclusion of persons with disabilities. These requirements include, but are not limited to:

1. Having staff trained in how to provide reasonable modifications in policies, practices and procedures;
2. Having auxiliary aids and services available in a timely manner in order to ensure communication access;
3. Ensuring that any service areas and related facilities open to the public are architecturally accessible and have been inspected and approved by the DPW Access Compliance Officer or the Mayor's Office on Disability Compliance Officers.

If such access would be technically infeasible, this is described in the comments section below:

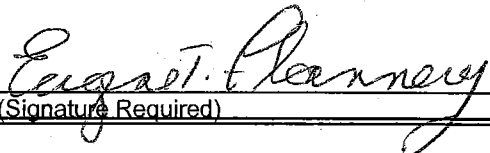
Comments:

Departmental ADA Coordinator or Mayor's Office of Disability Reviewer:

Eugene T. Flannery
(Name)

Environmental Compliance Manager/ADA Coordinator
(Title)

Date Reviewed: 3-22-13

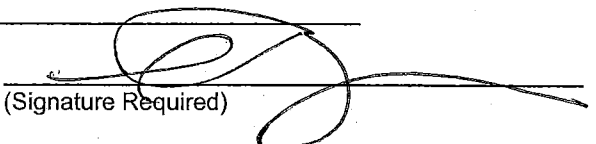

(Signature Required)

Department Head or Designee Approval of Grant Information Form:

Todd Rufo
(Name)

OEWD Director
(Title)

Date Reviewed: 3-26-13


(Signature Required)



San Francisco EZHTC Process Estimate v1.1

Project Description

San Francisco have described a need for a web based application that can control the Enterprise Zone credit application process. The process is a process that will be housed entirely within a drupal site, using AchieveForms for the request forms and process control.

Process Description – Full Review

This section describes the process the Enterprise Zone Tax Credit Application form. Each step represents a different user role and their actions to complete each step.

1. Application
 - a. User logs in and see list of active applications and past inactive applications
 - b. User can choose to submit a new application
 - i. In each application, user can list a number of employees for credit
 - ii. For each employee added to the application, an application fee is added to total payable
 - iii. On submission of form, user is taken to a payment screen to pay for all charges via credit card
2. EZHTC Admin Review
 - a. EZHTC Admin logs in and sees list of applications requiring review
 - b. EZHTC Admin can review each application and choose to approve or reject each employee
 - i. If rejected, the EZHTC Admin enters a reason
 - ii. If Approved, a voucher is generated as a pdf
 - iii. On submission, User is notified of all approvals and rejections
 - iv. On Submission, all vouchers are emailed to User

Screen Description

This section gives a rough description of what each user will see. Once the project starts, San Francisco will have an opportunity to review and request changes to the screens.

1. User
 - a. Create new applications
 - b. My active applications (list all)
 - c. My completed applications (list all)
 - d. My Vouchers
2. All other roles
 - a. My tasks (list all)
 - b. Reports Link
 - c. Find Application
 - d. Find Voucher

Reports

Below is a list of reports that will be configured as part of the application build.

- List details of all active applications
- List details of all approved applications for user selected start and end date
- List details of all dis-approved applications for user selected start and end date
- List details of all applications for user selected User
- List active, approved, dis-approved counts
- Export all request to CSV format for excel viewing

Assumptions

- A user can submit as many employees as they wish in each form
- User must pay for applications via online credit card payment
- Each stage is a single action (open, complete required and optional fields, submit)
- Process is a simple 2 stage process. Apply and review only.
- Applications are marked as approved or rejected only. No edit option required.

Cost Estimate

Services

- Process Building - 2 days
- Site Configuration - 2 days
- Report Building - 3 days
- Voucher Generation - 1 day
- Site Theming - 1 day
- Handover and Training - 1 day
- Total estimate: 10 days @ \$1,600 (US) per day - Discounted to \$0

Licence

- AchieveForms Licence - \$11,520 per annum
 - Up to 1500 submissions per month
 - Usage will be monitored and if usage exceeds limits, San Francisco will be contacted to discuss usage levels. If appropriate, licence will be increase to 3000 per month at a cost of \$16,000 per annum (prorated for remaining contract)
- AchieveForms Payment Integration - \$3,000
- AchieveForms Payment Integration Support and Maintenance - \$1,000 per annum

Firmstep

St John's Innovation Centre
Cowley Road, Cambridge
CB4 0WS
United Kingdom
Tel: +44 (0)845 487 2971
US Tel: 1-800-882-4043
Fax: 0870 765 9076

Firmstep is a trading name of Business Web Software
Registered in England and Wales, No 4283951

June 13, 2013

Natosha Safo
Business Development Manager

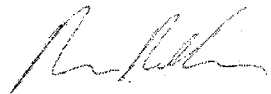
Office of Economic & Workforce Development
City Hall Room 448
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

Dear Natosha,

Please accept this letter as confirmation that the in-kind portion of the EZHTC project has been delivered.

This portion reflected the configuration work needed to build and deploy the EZHTC project. The value for this work was set at \$16,000.00 and has been delivered in full.

Regards



Ross Balharry
Firmstep

OFFICE OF THE MAYOR
SAN FRANCISCO



EDWIN M. LEE
MAYOR

TO: Angela Calvillo, Clerk of the Board of Supervisors
FROM: *pa* Mayor Edwin M. Lee *pa*
RE: Accept and Expend Gift –Enterprise Zone Hiring Tax Credit Web
Application Development - \$16,000
DATE: June 25, 2013

Attached for introduction to the Board of Supervisors is the resolution authorizing the Office of Economic & Workforce Development to retroactively accept and expend an in-kind gift valued at \$16,000 from Firmstep for the development of the web-based Enterprise Zone hiring tax credit application.

I request that this item be calendared in Budget and Finance Committee on July 24th, 2013.

Should you have any questions, please contact Jason Elliott (415) 554-5105.

RECEIVED
BOARD OF SUPERVISORS
SAN FRANCISCO

2013 JUN 25 PM 4:42
pa

