JSEB Scope Document

PROJECT NAME: Jacksonville Small and Emerging Business – Technology Upgrades

DEPT/DIVISION: Equal Business Opportunity Office

PROJECT SPONSOR: Ed Randolph, Economic Development Officer

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Wanyonyi Kendrick, Acting Director of Technology Solutions

PROJECT TYPE: Technology Upgrades

JSEB – Scope Document

Table of Contents

JSEB – Scope Document

Executive Summary Report

1. Project Background

CM Freeman had demonstrated exceptional dedication and commitment to fostering innovation and technological advancement within our community; their visionary leadership has been instrumental in the development and implementation of a cutting-edge small business JSEB program that leverages technology to support local entrepreneurs and stimulate economic growth; this program has provided invaluable resources, tools, and support to small businesses, enabling them to thrive in an increasingly digital economy; their efforts have significantly contributed to the creation of a more vibrant and resilient local business ecosystem. We now enter the next stage under the visionary oversight of CM Arias.

Therefore, based on their visionary leadership we enter the next phase of the JSEB technology evolution: JSEB Application Electronic Form with DocuSign eSignature integration, Website Upgrades and Spatial Countywide Map of JSEBs by District.

2. Project Objectives

The JSEB Enhancement Initiative aims to improve the accessibility, functionality, and spatial data integration of the Jacksonville Small and Emerging Business (JSEB) program. This will be achieved through the development and deployment of four key components:

1) An electronic JSEB application

2) An eSignature DocuSign solution integration allowing for electronic signatures

3) A revamped JSEB website

4) A spatial Geographic Information System (GIS) Dashboard

Key activities to meet project objectives include the following:

1) Requirement Gathering: Engaging with stakeholders to gather detailed requirements for each initiative.

2) Design and Development: Creating design specifications and developing software and web components.

3) Testing: Conducting rigorous testing to ensure functionality, security, and usability.

4) Deployment and Training: Implementing the solutions and providing training sessions for end-users.

5) Maintenance and Support: Establishing ongoing support and maintenance procedures to ensure the solutions remain effective and up-to-date.

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3. Project Scope

1) **Electronic JSEB Application:**

   a) Development of a user-friendly electronic application process for JSEB certification.

   b) Implementation of secure data entry and storage mechanisms to protect applicant information.

   c) Integration of automated verification and approval workflows to streamline the application process.

   d) Provision of a dashboard for applicants to track the status of their submissions.

2) **DocuSign eSignature:**

   a) Implementation of secure automated electronic signature workflows that allow for sending, signing, tracking, and managing the review and signature process, including the ability to select signer routing orders for multiple signers and delegation of signing responsibility to others.

   b) Automated verification and approval workflows to streamline the application process.

   c) Provision of different file formats PDF, Word, Excel, PowerPoint for applicants to track the status of their submissions.

   d) Distribute content security through integration with Oracle Procurement Cloud Fusion.

3) **JSEB Website:**

   a) Redesign of the existing JSEB section on Jacksonville.gov to enhance user experience and navigation.

   b) Inclusion of comprehensive resources such as guides, FAQs, and contact information.

4) **Spatial GIS Application:**

   a) Creation of a spatial GIS Application to map the geographic distribution of JSEB-certified businesses.

   b) Integration of this Application with the JSEB website to allow users to search for businesses by location.

   c) Development of tools for data visualization and analysis to support strategic planning and decision-making.

   d) Provision of regular updates to ensure the accuracy and relevance of the spatial data.

4. Project Time Estimates

1) Electronic JSEB application: Early July

2) eSignature DocuSign integration: End of September

3) Revamped JSEB website: Mid-September

4) Spatial GIS Dashboard: End of September

5. Project Exclusions

1) The project will not include the development of mobile applications outside of the electronic JSEB application.

2) This project does not include a redesign or rebuild of the following system *JSEB Directory* (jaxseb.coj.net).

3) Data migration for existing JSEB records will be limited to the extent required for the new systems.

4) Customizations beyond the initially agreed-upon requirements will not be included without scope reassessment.

6. Assumptions

1) Stakeholders will be available for requirement gathering and feedback sessions.

2) Adequate budget and resources will be provided to complete the project within the stipulated timeframe.

3) All necessary data and access permissions will be granted to facilitate the development of the GIS Application.

7. Constraints

1) The project must be completed within a 12-month timeframe.

2) Budget limitations may restrict the scope of certain features or functionalities.

3) Compliance with data privacy regulations and standards is mandatory.

8. Key Stakeholders

1) JSEB Program Management Team

2) City of Jacksonville Administration

3) Small and Emerging Business Community

Project Scopes
1Cloud -JSEB Certification Application

PROJECT	PROJECT MANAGER	DATE
1Cloud - JSEB Certification Application	Kandie Bagby	5/24/2024

JUSTIFICATION

The Jacksonville Small and Emerging Business Program, enacted to support and assist local small and emerging businesses in establishing direct contracting or subcontracting business opportunities, faces challenges with the current paper application process regarding efficiency, effectiveness, and security of sensitive information. By digitizing the application process, improvements will be made to reduce the time to process an application, streamline the workflow approval process, provide security of sensitive information documents, allow for more reportable metrics, and more quickly establish a business as JSEB Certified for potential bidding opportunities.

SCOPE DESCRIPTION

#	Enhancement	Description
1.	Digitize the JSEB Certification Application	An electronic application will be configured within the Supplier Qualification Management module in the 1Cloud system for the JSEB Certification Application.
2.	Electronic Workflow – Submission, Review, Corrections, Acceptance, & Approval	Utilize workflow capabilities within the Supplier Qualification Management module in the 1Cloud system for the JSEB Certification Application process.

PROJECT OBJECTIVES

#	Description
1.	The digitalization of the JSEB Certification Application will enhance the efficiency and effectiveness of the JSEB Certification Application process for both applicants and staff.
2.	The digitalization of the JSEB Certification Application will allow more accurate and timely reporting of the JSEB portfolio.
3.	The digitalization of the JSEB Certification Application will enhance the security of sensitive information documents retrieved during JSEB certification process.
4.	Utilize COJ internal resources to complete system configuration, yielding an estimated 1.4 million cost savings to the City.
5.	Enhance the efficiency and effectiveness of communicating the JSEB registration and spend progress for the City to all concerned users, including City Council and the Mayor's office.

PROJECT EXCLUSIONS

#	Description
1.	No changes to the Jacksonville Ordinance 2021-117 with revised Chapter 126 are needed.
2.	Existing JSEB Certified suppliers will not be affected by the digitalization of the JSEB Certification Application process.

PROJECT CONSTRAINTS

#	Description

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JSEB – Scope Document

1.	Any change in scope will require the submission of a change request. Change requests will prevent the project from being completed within the cost estimate / projected hours.
2.	The JSEB Office is moving locations from the Ed Ball Building to the St. James Building and may impact project resources and their availability.

DocuSign – JSEB – Project Scope

PROJECT	PROJECT MANAGER	DATE
DocuSign *Jacksonville Small & Emerging Business*		06/06/2024

JUSTIFICATION
• The Jacksonville Small & Emerging Business (JSEB) Team is currently processing JSEB certification applications electronically via the 1Cloud ERP system. • The goal of this project is to utilize functionality within the DocuSign system, which is currently being used by the City on an enterprise level. Many users throughout the City are familiar with the DocuSign system, accelerating set up and user adoption. The DocuSign system specializes in electronic signature workflow, lending the process to be more configurable and allowing JSEB to establish formal processes without having to request changes to the 1Cloud ERP system.

SCOPE DESCRIPTION

#	Function	Description
1.	Create Electronic Documents/Fillable Forms	Allow for the creation of electronic documents/fillable forms by providing the following functionality: • Identify form fields in a preexisting document • Manually add/edit/remove fields (text, tags, supporting attachments, etc.) • Add electronic signature fields • Create templates for future use
2.	Electronic Application Submittal	Allow applicants* to access, complete, electronically sign, and submit electronic applications. *= Applicants include small businesses within the City of Jacksonville.
3.	Approval Workflow	Allow for submitted applications to be routed to appropriate reviewers and approvers. • Provide a return for corrections workflow. Users must be able to leave return for corrections comments.
4.	Reporting / Analytics	Allow for reporting and analytics including: • How many electronic applications have been submitted • Signature/Approval status • Etc.

PROJECT OBJECTIVES

#	Description
1.	Eliminate manual application review and approval processes.
2.	Simplify document creation, increase productivity, and improve decision-making.
3.	Enable performance and process improvement through data analytics.

TECHNOLOGY SOLUTIONS

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4.	Enhance transparency providing a holistic view of submitted applications, key performance metrics and dashboards.
5.	Implement formal document structures and templates.

PROJECT EXCLUSIONS	
#	Description
1.	N/A

PROJECT CONSTRAINTS	
#	Description
1.	Any change in scope will require the submission of a change request and may impact Cost Estimates.

PROJECT ASSUMPTIONS	
#	Description
1.	Stakeholders will be available for discovery and feedback sessions.
2.	Adequate budget and resources will be provided to complete the project within the stipulated timeframe.
3.	All necessary data and access permissions will be granted to facilitate the development.

GIS JSEB Dashboard Application

PROJECT	PROJECT MANAGER	DATE
GIS JSEB Dashboard Application	Steve Herczeg	6/3/2024

JUSTIFICATION
The Jacksonville Small and Emerging Business Program, enacted to support and assist local small and emerging businesses in establishing direct contracting or subcontracting business opportunities, faces challenges in communicating its progress in improving the registration and usage of JSEB's by the City of Jacksonville. However, programs have been established, progress made, and additional programs planned, and it is now critical to communicate the progress in an effective way that makes it easy for both internal CoJ and public audience to understand where the program stands. This tool should be visual and focused on City Council District to allow users to track changes in an understandable way.

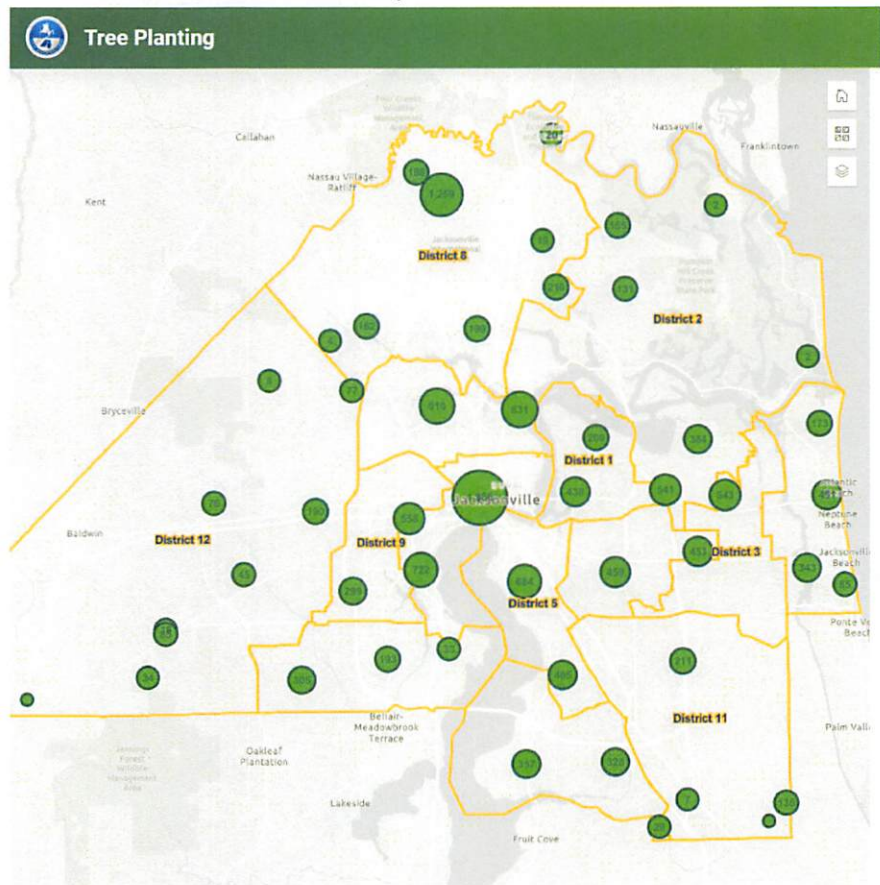| SCOPE DESCRIPTION		
#	Enhancement	Description
1.	Create a visual map application to represent JSEB participation.	Create a map application giving the users the ability to visualize the number of JSEB's by City Council District, shown as a rolled-up total per district. Provide the ability to see a list of all JSEB's individually by searching by JSEB name or as part of a list of JSEB's either overall or by Council District. JSEB detail provided will include the following: - Supplier Name - DBA Name - Business Address - City Council District - Council District Member - At Large Group - At Large Group Council Member - Years In Business (when available) - Sunbiz Date - Years As JSEB

- Original Certification Date
- Primary Industry
- Secondary Industry
- Tiers (based on annual revenue)
- Total $ Amount In City Contracts FY 2022
- Total $ Amount In City Contracts FY 2023
- Year To Date Amount In City Contract

Data will be updated weekly (or better) based on connections created to the 1Cloud platform database.

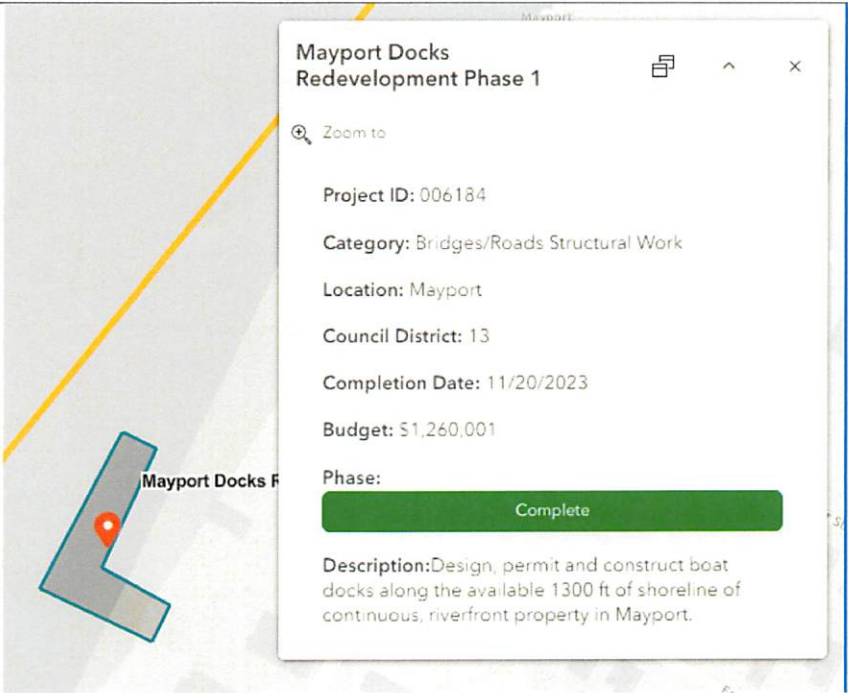Below are visualizations similar to those envisioned for this application (which are NOT JSEB related but provided for the purpose of illustration).
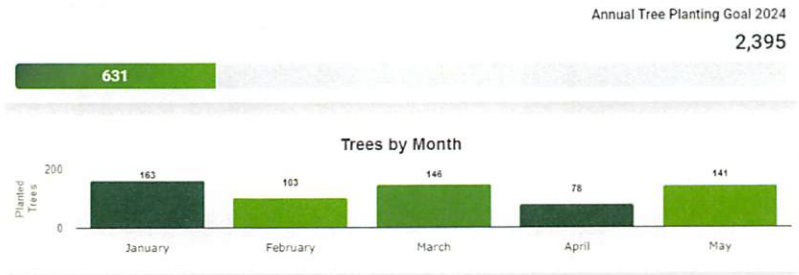
An example of a map view showing aggregation of many points, which will be tailored to show JSEB's by Council District:

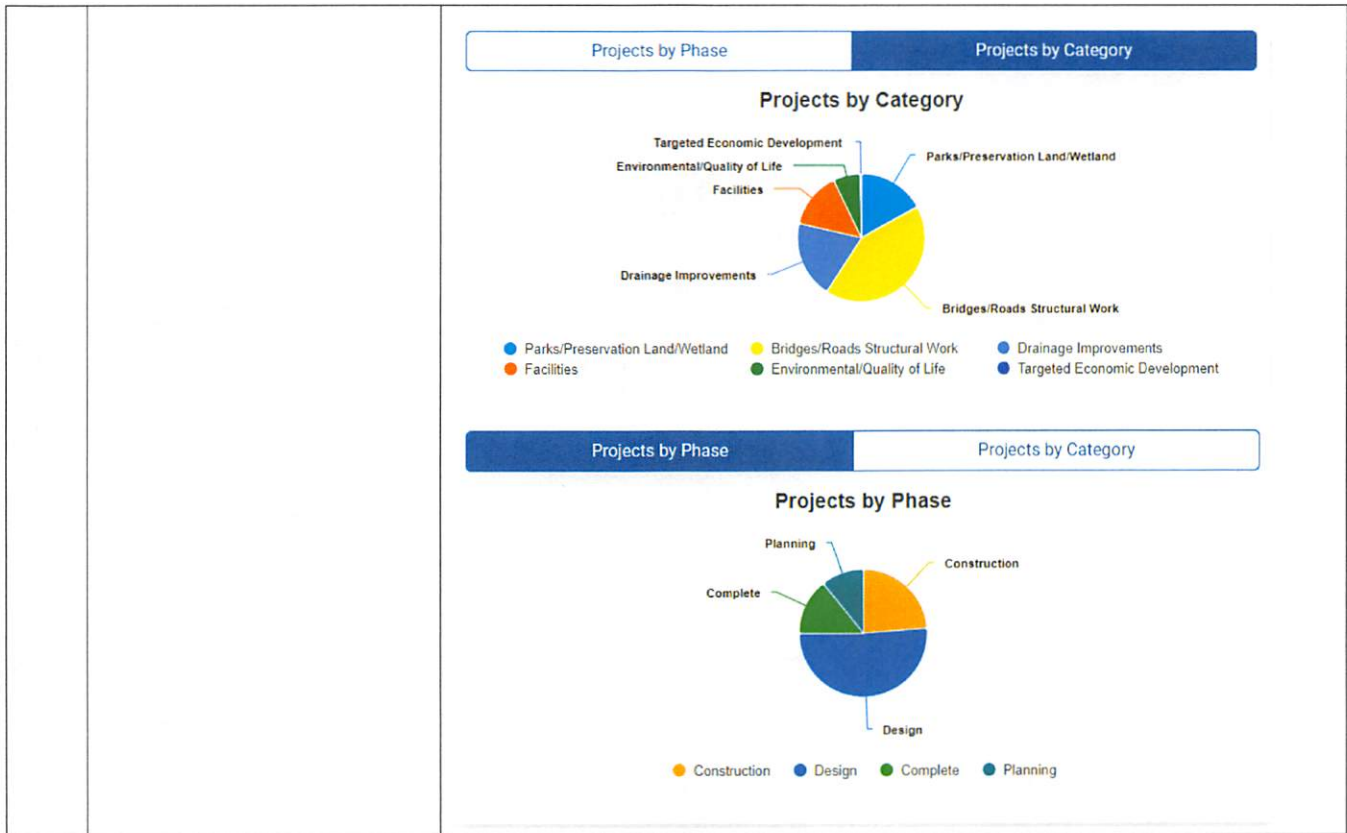An example of a popup which will be similarly used to show detail appropriate for each JSEB:

2.	Dynamic chart widgets showing statistical progress by category.	Graphs showing (at a minimum): • Number of JSEBs by City Council District • Number of JSEBs by At-Large Districts • JSEBs Years in Business by year range grouping (when available) • Number of JSEBs by Tiers • Percentage of JSEBs by Tiers • Comparison charts (as requested by JSEB management) to show changes month to month in the above statistics. Below are visualizations similar to those envisioned for this application (which are NOT JSEB related but provided for the purpose of illustration). Examples of charts showing annual and ongoing reporting currently being used, which will be modified with and for JSEB statistics and customized to provide statistics identified above.

TECHNOLOGY SOLUTIONS
JSEB Scope v0.03.docx
As of 6/11/2024
Page. 10 of 15
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JSEB – Scope Document

PROJECT OBJECTIVES	
#	Description
1.	Enhance the efficiency and effectiveness of communicating the JSEB registration and spend progress for the City to all concerned users, including City Council and the Mayor's office.
2.	Illustrate improvements in statistics using charts and graphs to represent changes over time using frequencies defined by JSEB management (generally month to month).
3.	Utilizing an interface to 1Cloud and leveraging the development of a new automated input UI for JSEBs, greatly improve the integrity and completeness of the data being provided spatially to the public.

PROJECT EXCLUSIONS	
#	Description
1.	N/A.

PROJECT CONSTRAINTS	
#	Description
1.	Any change in scope will require the submission of a change request. Change requests will prevent the project from being completed within the cost estimate / projected hours.

TECHNOLOGY SOLUTIONS
JSEB Scope v0.03.docx
As of 6/11/2024
Page. 11 of 15
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JSEB – Scope Document

Creation of a Stand-Alone Website for JSEB

PROJECT	PROJECT MANAGER	DATE
Creation of Stand-Alone Website for JSEB	Sherry McGuire	06/07/2024

JUSTIFICATION

The Jacksonville Small and Emerging Business Program, established to foster the growth of local small and emerging businesses by facilitating direct contracting or subcontracting opportunities, currently lacks a dedicated website. This absence hampers the program's branding efforts and limits accessibility to crucial information.

SCOPE DESCRIPTION

#	Enhancement	Description
1.	Create a stand-alone website environment for JSEB.	The project involves creating a stand-alone website for the Jacksonville Small and Emerging Business (JSEB) Program, aiming to enhance accessibility and visibility for local small and emerging businesses. The website will feature a welcoming landing page, customizable subpages for program details, and a user-friendly Content Management System (CMS) for easy updates. Security measures and ADA compliance will ensure data protection and accessibility. Additional features include news and events sections, links to social media if applicable, Google Translate for multilingual support, and Google Analytics for insights. Integration of the Jacksonville Gov global footer will ensure consistency, while space will be reserved for a Power BI dashboard if applicable.

PROJECT OBJECTIVES

#	Description
1.	Design and implement a user-friendly interface that allows easy access to program details, eligibility criteria, application procedures and resources for small and emerging businesses.
2.	Integrate a news and events section to disseminate program announcements, success stories, policy changes, and industry updates to stakeholders and the local business community.

PROJECT EXCLUSIONS

#	Description
1.	No changes will be made to the provided JSEB information.
2.	No other known exclusions currently.

PROJECT CONSTRAINTS

#	Description
1.	Any change in scope will require the submission of a change request. Change requests will prevent the project from being completed within the cost estimate / projected hours.
2.	Use of third-party services such as Google Translate, Google Maps and Google Analytics, may require maintenance for future updates.
3.	This project does not include a redesign or rebuild of the following system *JSEB Directory* (jaxseb.coj.net).

PROJECT ASSUMPTIONS

| #	Description
1.	Availability of relevant program information and materials for inclusion on the website will be provided by JSEB.
2.	After implementation Technology Solutions will not be responsible for editing/updating content. Content will continue to be maintained from JSEB as before.
3.	Collaboration and support from program stakeholders for website development and content review.

JSEB – Scope Document

4.	Timely availability of necessary resources and approvals for project implementation.

Examples

Example GIS Dashboard:
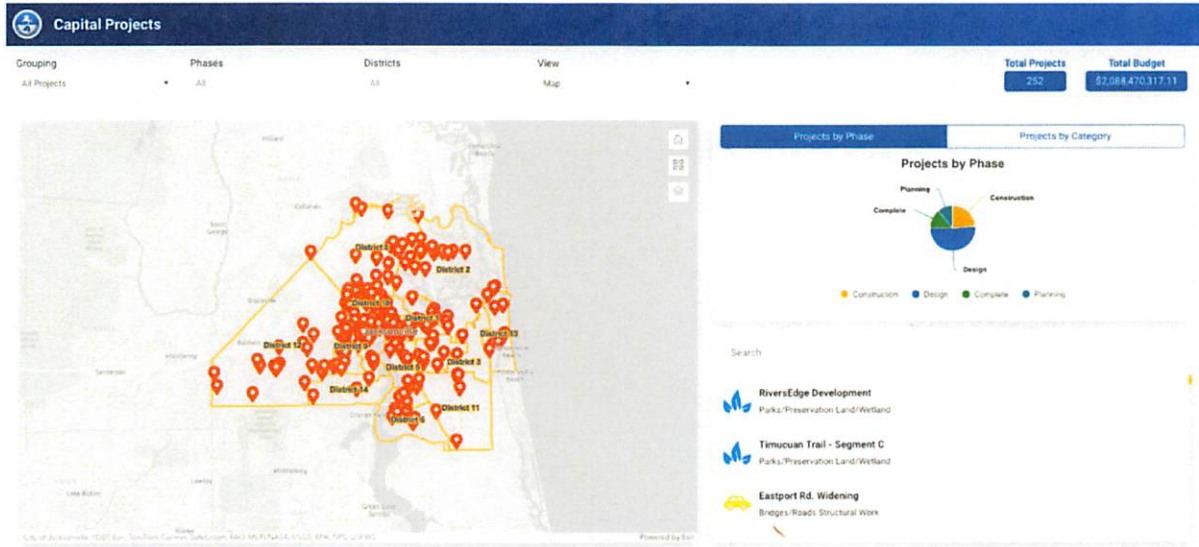
JSEB – Scope Document

Mockup for Stand Alone website:

JSEB – Scope Document

Approval Signatures

	SCOPE DOCUMENT APPROVAL & SIGN-OFFS	
Role	**Name/Title**	**Approval Date**
Business Sponsor	Ed Randolph, Economic Development Officer X _Edward Randolph_	06/12/2024
Business Sponsor	Gregory Grant, Business Compliance Administrator DocuSigned by: X _Gregory Grant_ 37D8BD6DA52D45E	6/12/2024
ITD Sponsor	Wanyonyi Kendrick, Acting Director of Technology Solutions X Wanyonyi Kendrick Digitally signed by Wanyonyi Kendrick Date: 2024.06.12 12:45:08 -04'00'	