Digital Foundry

+

IDEO

The City and County of San Francisco's Voting System
RFI# REG2015-01
Version 1.0

Prepared for: Shane Burgos

Submitted August 28th, 2015

To the City & County of San Francisco,

As a local technology firm with roots in the San Francisco Bay Area, Digital Foundry is excited to learn that the City and County of San Francisco is exploring options for implementing a new voting system. The City's preference for an open source solution is welcomed, as it would provide unique opportunities for improving transparency and the raising public's trust in San Francisco's election processes. Additionally, an open source approach would free the City from the costly and inflexible vendor model that exists today, where a limited number of suppliers provide proprietary technology that is closed-off from the public. This model typically results in a one-size fits all approach that is neither user-centric nor innovative.

Considering that no open source voting system has yet been certified by the California Secretary of State, San Francisco will likely need to develop their own solution, preferably through a user-centered approach that takes into account the City's unique voting needs and leverages lessons learned from similar initiatives. In doing so, the City will need to consider a variety of factors such as the desired voting experience, the necessary system architecture, and if the system is open, the appropriate rollout strategy and governance model. We believe the answers to these questions, among others, should dictate the solution and are best explored through a solution design effort that informs the City's request for proposal and positions the project for success prior to implementation and/or acquisition.

Digital Foundry has extensive experience partnering with IDEO, a leading human-centered design firm, in implementing targeted solutions to complex technical and design challenges. We also have deep experience working together on high profile, public sector innovation projects within the voting system space.

Currently, Digital Foundry and IDEO are engaged with another, large municipality to develop an open source system that is aimed at improving voter turnout, transparency, and the ease of administering elections. We see a similar opportunity in San Francisco's own initiative to develop a new voting system that uses open source technology.

As a next step, Digital Foundry and IDEO request a discovery meeting in which domain experts from both Digital Foundry and IDEO would meet with key San Francisco Voting Initiative stakeholders to discuss the vision, align stakeholder expectations, surface opportunity areas for future exploration, understand constraints and uncover readiness. This half-day discovery meeting (explained in more detail on slide 2) would greatly improve Digital Foundry and IDEO's ability to understand your needs and ultimately craft an approach that is tailored to the needs and voters of San Francisco.
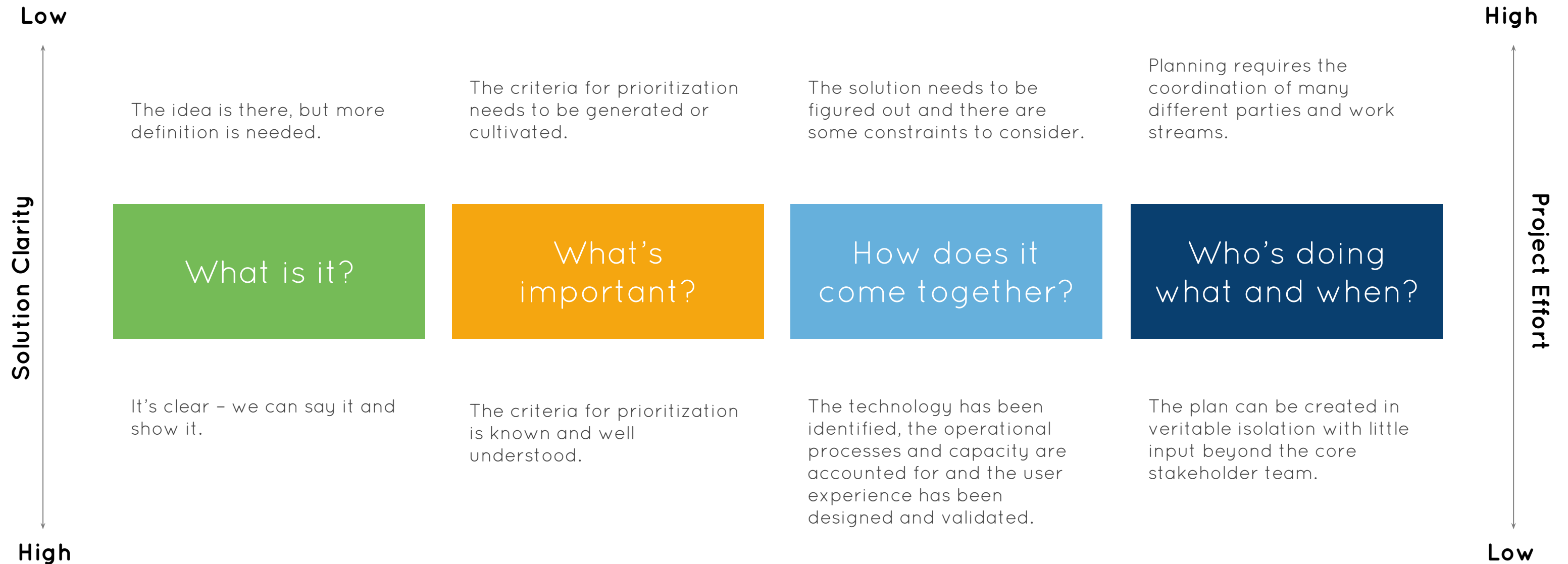
Looking Forward,

The team at Digital Foundry

Discovery Meeting with Digital Foundry, IDEO, & The City and County of San Francisco

Discovery meetings are an important first-step in the agile process. This meeting helps clarify the vision for a new digital initiative, align stakeholder expectations, surface opportunity areas for future exploration, understand constraints and uncover readiness. By having a clear view of the mission and goals for a new project, stakeholders are better equipped to evaluate which types of approaches and solutions are most appropriate for their needs. This minimizes risk for the project by narrowing the solution space and providing a framework for evaluating next steps. Also, this sets the stage for a follow-on solution design phase that builds confidence in the final result through rapid learning and experimentation.

Digital Foundry and IDEO are proposing a half-day meeting in which digital strategy consultants, solution architects, experience and interaction designers from Digital Foundry and IDEO meet with relevant election officials and key San Francisco Voting Initiative project stakeholders to better understand the project needs and identify viable approach strategies to inform next steps.

	Low			**High**

Solution Clarity (left vertical axis) — **Project Effort** (right vertical axis)

Top row descriptions:
- The idea is there, but more definition is needed.
- The criteria for prioritization needs to be generated or cultivated.
- The solution needs to be figured out and there are some constraints to consider.
- Planning requires the coordination of many different parties and work streams.

Colored boxes:
- **What is it?**
- **What's important?**
- **How does it come together?**
- **Who's doing what and when?**

Bottom row descriptions:
- It's clear – we can say it and show it.
- The criteria for prioritization is known and well understood.
- The technology has been identified, the operational processes and capacity are accounted for and the user experience has been designed and validated.
- The plan can be created in veritable isolation with little input beyond the core stakeholder team.

High				**Low**

Is Solution Design Right for San Francisco's Voting System Initiative?

If the vision is clear, the user needs are known, and the project parameters are well defined, then acquisition and integration of an existing solution may be the best option. However, if there is a desire to rethink the current voting process and offer the people of San Francisco an innovative, new experience, then the City and County of San Francisco may need a custom solution design approach aimed at realizing these opportunities. Digital Foundry and IDEO hope to assist the City in determining which approach makes the most sense based on the outcome of the proposed discovery meeting.

Strategy
How do you design something that is ALIGNED with your vision?

- Vision Alignment
- Inception Workshop
- Digital Business Drivers
- Capability Framework

User
How do you design something that your USERS NEED and DESIRE?

- User Needs Analysis
- Concept Ideation
- Opportunity Area Exploration
- Prototype Testing

Technology
How do you design something that is technically FEASIBLE?

- Technical Proofs
- Feasibility/Dependency Analysis
- Reference Architecture
- Prototyping

Process
How do you design something that is operationally VIABLE?

- Product Ownership Training
- Agile Workshop
- Project Community Map
- Digital Organization Transition

Company Profile

Introduction

DIGITAL FOUNDRY is a seasoned agile software planning and implementation shop that above all gets the job done by helping organizations realize their digital vision for over 20 years.

IDEO is an award-winning global design firm that takes a human-centered, design-based approach to helping organizations like The City and County of San Francisco innovate and grow.

TOGETHER our two organizations complement one another to design and implement best-in-class digital experiences for large scale challenges.

We are the ideal creative collaborators to help you deepen your empathy, identify actionable insights around the voting experience, and ultimately plan, develop, and launch a next generation voting solution for the City.

We are innately focused on the human element in everything we touch. To us, working with the City is not just another project. We are excited about the opportunity to leverage our passionate and fearless designers and developers to change the conversation, practice, and transparency of voting. It would be an honor and privilege to work with you and your team to bring your important vision to the world. We think it's much needed, and we think the time is now.

This ambitious quest deserves outstanding partners with an unmatched track record, reputation, and deep expertise. IDEO and Digital Foundry are those partners. From design research to insights to concept design and implementation, we are committed to the successful design, implementation, and launch of the City's next voting solution.

We are honored that you are considering us for this profoundly important work.

Who is Digital Foundry?

Since opening its doors in 1992, Digital Foundry has been helping global leaders build better businesses. Over a thousand projects later, Digital Foundry has fine-tuned the mix of technical excellence, creative collaboration, and dedication that facilitates innovative software development. Our clients often break new ground with exciting software solutions that differentiate their business in the marketplace and forge new connections with their customers. Our drive, experience, and technical facility make us more effective, more efficient, and more innovative than our competitors. We bring these qualities to every client engagement.

JUMPSTARTING DIGITAL INNOVATION

Digital Foundry offers a wide range of business and software consulting services that support our clients during the entire software implementation process from strategy and conceptualization to detailed planning, development, training, and maintenance. We work with companies that want to create innovative software platforms that support their business processes and initiatives through digital channels. Working on projects like these has given us extensive experience with software consulting, project planning, software development, technical infrastructure management, training, and knowledge transfer.

YOUR VISION, PURE RESULTS

Digital Foundry unites the business intelligence and implementation expertise necessary to tailor unique solutions to meet our clients' needs. We provide the people, the experience, and the energy to jumpstart this process for our clients. For each engagement, Digital Foundry deploys teams of seasoned software experts that create the critical mass necessary to spur innovation. Once the process is in motion, we work with the engagement team to personalize an approach that best addresses business goals and satisfies the expectations of platform administrators and site users. Creating a friendly, easily maintainable product ensures a smooth transition as our client assumes full responsibility for platform operations and users adopt the new services.

Who is IDEO?

IDEO is an innovation and design firm that uses a human-centered approach to help clients find opportunities for growth within the rapidly moving, complex, and novel realities of today's interconnected world. For over thirty years, IDEO has built a successful legacy of working with leading companies across a variety of industries. We bring deep expertise in the design of innovative products, services, brands, and the organizations that deliver them. As a leader in this field, we have been applying our methodology to understand the desires and unmet needs of customers and employees to help our clients imagine new possibilities and build a different future.

DESIGN THINKING IS IN OUR DNA

It isn't just a term for us. It's a way of being. Our work is inspired by people. Regardless of whether we are building a new retail space or a digital application, we use a human-centered approach to innovation that integrates the needs of people, the possibilities of technology, and the requirements for business success. This is our designer's toolkit. As champions of the Design Thinking philosophy, we believe in spreading it to the world.

We seek to empower and inspire leaders, students, and people everywhere to learn our process in order to own and drive innovation within their organization and themselves. Our CEO, Tim Brown, keeps a blog on it (designthinking.ideo.com), we speak at TED about it (2008, 2009), and we write books about it (Change by Design and Creative Confidence). We aim to inspire everyone, including people who aren't trained as designers, to use creative tools to address a vast range of challenges.

WE ARE ON THE FOREFRONT OF INNOVATION...WITH YOU

IDEO is ranked as one of the most innovative companies in the world by Fast Company and the Boston Consulting Group and has won more IDEA awards than any other design firm. We have set up internal innovation centers and constructed launch labs for multiple Fortune 500 clients. However, we don't operate alone. We work collaboratively with our clients to ensure innovation is realized. We use both analytical tools and generative techniques to help clients see how their new or existing operations could look in the future—and together build road maps for getting there. Our methods include space prototyping, product design, service design, organizational design, qualitative and quantitative research, and digital tool development.

DF + IDEO

OUR COMBINED EXPERIENCE PROVIDES A UNIQUE PERSPECTIVE ON YOUR CHALLENGE

IDEO and Digital Foundry have deep experience working together on high profile, public sector innovation projects. Currently, we are engaged with another larger municipality to develop the first open source voting system in the United States. Aimed at improving voter turnout, transparency, and the ease of administering elections, the new voting system will accommodate voters of all kinds and provide a template for other cities and counties to modernize their own systems.

Based on this experience, we have tremendous collective know-how around voter behavior and needs that can be immediately leveraged to set our concept directions.

OUR RECOMMENDED APPROACH IS TAILORED TO MEET YOUR NEEDS

IDEO has the vision and Digital Foundry has the technical skills to shepherd the City as it develops and builds a service that is true to the spirit of the project.

The success of this project will depend in large part on asking the right questions during the design research phase and choosing the right combination of experience, operational capacity, and technical capability to meet the project objectives. Our experience with all phases of the development cycle comes into play here as well: we know what questions to ask because we've designed and built numerous complex end to end systems and products for clients in both the public and private sector.

TOGETHER, DIGITAL FOUNDRY AND IDEO ARE UNIQUELY QUALIFIED TO DESIGN AND IMPLEMENT A NEW VOTING SYSTEM FOR THE CITY AND COUNTY OF SAN FRANCISCO

The Right Team

We believe that the project team is truly greater than the sum of its parts. Each engagement is a unique experience with its own challenges. To address this, we handpick a project team for our clients with the flexibility to adapt to the various project phases as well as changing business needs.

This means that at any given point in the project, the team will be comprised of the appropriate blend of subject matter experts including: Interaction Designers, Design Researchers, Software Prototypers, Business and Technical Leads, Software Architects, Scrum Masters, Business Analysts, Software Engineers, Quality Assurance Engineers, and Strategy Consultants.

From this group, we'll handpick a flexible, highly collaborative, and cross-functional team to help the City reach their objectives.

As the project progresses and the City's needs evolve, we will adjust the team composition to ensure that the right people are in the room. To ensure continuity across the engagement, a dedicated project manager and technical lead will be active members of the team.

Responses

1. Provide organization's or firm's legal name and address.

Digital Foundry, Inc.
1707 Tiburon Blvd
Tiburon Ca, 94920

IDEO
150 Forest Ave
Palo Alto, CA 94301

2. Provide the name, title, address, telephone number, and email address of the person(s) who will serve as the contact(s).

Steve Turko
New Business Lead, Digital Foundry
1707 Tiburon Blvd
Tiburon CA, 94920
(415) 366-4044
s_turko@digitalfoundry.com

Brad Stauffer
President, Digital Foundry
1707 Tiburon Blvd
Tiburon, CA 94920
(415) 366-4020
brad@digitalfoundry.com

Rachel Switzky
Associate Partner, Head of Business Development, IDEO
150 Forest Ave
Palo Alto, CA 94301
(650) 289-3677
rswitzky@ideo.com

3. Provide a letter of introduction with a brief description of the organization or firm, including organizational structure, experience in the industry, number of years providing voting systems and election support services to federal, state, or local governments.

Please refer to DF + IDEO services on Slides 6-10 of this RFI response.

4. Provide a summary of the products and services offered, including annual license fees, annual support fees, and/or annual subscription fees. Include third party applications that are being recommended. List prices are acceptable.

Please refer to slide Slides 6-10 of this RFI response.

5. Describe any election-related services that the organization or firm offers, including, without limitation, integration assistance, training, and ongoing support. Provide a rate structure or other costing information (i.e. hourly rate or pricing methodology) for the professional services offering. List prices are acceptable.

Digital Foundry and IDEO have partnered for over 20 years to provide tailor digital solutions to leading private and public sector organizations. Together, Digital Foundry and IDEO offer a suite of tailored digital services (digital vision, strategy, user experience, solution design, and implementation). One such project is with the County of Los Angeles (see references).

Digital Foundry and IDEO suggest a half-day discovery meeting with the City to discuss the project vision, align stakeholder expectations, surface opportunity areas for future exploration, understand constraints and uncover readiness. Following the discovery meeting, Digital Foundry and IDEO will structure a program (including scope of work, directional timeline and costs) to help the City define the desired voting system in preparation for implementation.

6. Describe the different implementation approaches (i.e. big bang vs phased roll out) that the organization or firm can offer to the City to fully implement a particular solution. Include the benefits and/or risks of each.

Digital Foundry and IDEO are proposing a consultative approach to flesh out the City's vision, needs, constraints, and plans for a voting system that leverages open source software. Prototypes to test the user experience and proofs to validate the technical assumptions typically take place during this phase.

Implementation follows, and is typically broken down into iterative cycles (agile) with periodic phased roll outs. This approach will allow the City to regularly introduce new experiences and quickly respond to community feedback.

7. Provide a brief description of the overall software and architectural design of applicable products.

Following the discovery meeting, Digital Foundry and IDEO will structure a program to define the voting system user experience and system (hardware & software) architecture. The system architecture is done as part of solution design, reviewed with the project sponsors and used by the team(s) responsible for implementing the project.

8. Describe the recommended operating environment(s) required to install and use any relevant systems and the minimum system requirements necessary to run such systems. Include any suggested production, development/test, and disaster recovery environments.

Operating environments, relevant systems, minimum system requirements (dev, testing, disaster recovery, etc) will be discussed during the solution design phase and refined during the initial phases of implementation.

9. Describe how the organization or firm envisions its software and hardware solutions changing over the next five to ten years.

Depending on the City's requirements, Digital Foundry and IDEO will likely tailor an approach that allows for the City to regularly introduce new experiences and quickly respond to community feedback. For this reason, software will continually evolve over the next five to ten years. An effort will be made to minimize changes to hardware.

10. If applicable, submit at least two (2) references of federal, state or local governments equal in size or larger than the City and County of San Francisco that have implemented the proposed system, or, a similar system, within the last five (5) years. Include:

Digital Foundry and IDEO are currently working with Los Angeles County to design an open source voting system. Appropriate references and introductions will be identified during the discovery meeting.

We look forward to continuing the conversation

Digital Foundry and IDEO have made an effort to address the questions included in the the City and County of San Francisco's Voting System RFI as comprehensively as possible given our current understanding of the project. The answers provided above are predicated on the information available at this time and may be refined and clarified during our future collaboration with the City's stakeholders.

Thank you for the opportunity to respond!

STEVE TURKO
DIGITAL FOUNDRY
S_TURKO@DIGITALFOUNDRY.COM

BRAD STAUFFER
DIGITAL FOUNDRY
BRAD@DIGITALFOUNDRY.COM

RACHEL SWITZKY
IDEO
RSWITZKY@IDEO.COM