New York Department of Finance
MyCity Finance portal
User Research – Research Industry

Project Background and Description

Background

In cooperation with the Office of Technology and Innovation (OTI) and in response to directives from Mayor Eric Adams for all City of New York customer service, the New York City Department of Finance (DOF) is working on updating its websites to streamline and ease the public's interaction with DOF in finding information, making payments, filing taxes, owning property, applying for benefits, and requesting services. In the end, it is envisioned that there will be a unified customer engagement architecture or site that is focused on making it easy for the customer to search, find, pay, and apply for services and benefits under DOF's purview. It will integrate with NYC's planned MyCity customer account so that only one set of login credentials will be required for all interactions across city government. And it will align all aspects of our online profile with the design standards in development at OTI. By radically reorienting our online offerings around the customer and linking our service offerings through strategic design, content, and data integration, **MyCity Finance Portal** (working title) will serve to support customers, moving them smoothly and easily through interactions and improving customer experience.

Request for Services

The New York City Department of Finance (DOF) seeks an experienced vendor team to conduct user research on user experiences as it relates to our core lines of business and service offerings:

- **Property Tax** payments, refunds, collections, and tax relief programs
- **Property Ownership**, owner, deed and mortgage registrations, valuation reviews
- **Tax Map**, updates to property parcels and the City's Tax Map
- **Business Tax** payments, refunds, collections, and tax relief programs
- **Parking Ticket** payments, refunds, collections, and hearings
- **Rent Freeze** reductions for renters and subsidizes for landlords
- **Payment** support for other NYC city agencies

The vendor team will identify target users, conduct interviews, and research their interactions with DOF related to their planned customer service or action outcomes. They will focus on existing and potential users, city agencies, and other target populations who encounter various frictions engaging with City government.

The goals of this project are to:
1. Understand relevant past research/prioritization that has been done
2. Understand and map user journey, noting areas of frustration
3. Understand user, political, policy, and technical constraints

4. Define performance metrics for user success
5. Identify clear potential opportunities for improvements, in user experience, site(s) structure, content architecture and content, and technical issues, based on the defined performance metrics

MyCity Finance Portal Core Project Team

The vendor team will work closely with the MyCity Finance Portal core project team, which includes primarily business, design and technical executives and staff from the New York City Department of Finance. This core project team will facilitate and coordinate engagement with a larger group of City Hall offices and city agencies as needed as part of the scope of this project. The city's customer engagement projects are being built using a user-centered and agile development approach; and the vendor team will be expected to follow these methodologies.

Description of Services

The scope of the services and work products will be focused on user experience as it relates to owning property, paying property and business tax, paying and disputing parking tickets, developing changes to property parcels, getting a rent freeze, and other interactions involving DOF. Working closely with the MyCity Finance Portal project team, the vendor team will:

1. Employ user-centered research analysis techniques to define target users and determine appropriate base sample size for the scope of this project to understand user experience

2. Design and implement primarily qualitative and some quantitative, attitudinal, and behavioral interview focused research questions for user experience and service design, with a heavy emphasis on 1:1 interviews.

3. Develop a clear problem statement with key goals, measures for success, and behavioral analysis from user research.

4. Create persona-driven user journey maps from end-to-end to document the user experience within the scope of this project

5. Document areas of friction, prioritize by highest frustration points found based on user research.

6. Provide a priority list of user needs:
   a) Explanations of the expected value, i.e., the level of effort to address vs. the friction/pain it causes in the current state.
   b) Explanations of the expected impact on the relevant agencies that includes process improvements.
   c) Anonymized quotes from user research subjects to support them.

7. Provide a ranked list of hypotheses for user research outcomes to test during subsequent Alpha content and product development, and an initial high-level user research strategy for

Alpha to ensure decisions are evidence-based.

8. Develop success criteria to measure the efficacy of MyCity Finance Portal resulting from the user research.

9. Summarize all design recommendations into an initial scope document of how DOF services, content, and transactions related to property tax, property ownership, tax map, business tax, parking ticket payments and hearings, rent freeze, and payments to other NYC city agencies should be included into MyCity Finance Portal.

Timeframe

The vendor team will deliver the following deliverables within a six-week timeframe:

High-level Activity & Deliverables	Est. Timeframe
A. Review existing documentation and understand current problem B. Identify target user population and determine base sample size C. Compile initial user research questions D. Deliver 1-hour weekly Show & Tell for MyCity Finance Portal core project team	Week 1-2
E. Recruit user base sample to conduct research	Week 2
F. Conduct user research G. Compile user research result H. Deliver 1-hour weekly Show & Tell for MyCity Finance Portal core project team	Week 2 – 4
I. Compile preliminary findings and analysis from user research including but not limited to customer journey maps J. Refine findings and analysis with MyCity Finance Portal core project team K. Deliver 1-hour weekly Show & Tell for MyCity Finance Portal project team	Week 4-5
L. Present preliminary design recommendations into initial scope document for **MyCity Finance Portal** M. Refine design recommendations with MyCity Finance Portal project team and at least one iteration of user feedback	Week 5-6

Minimum Requirements

Vendor's Minimum Requirements
Respondents must have a minimum of five (5) years prior experience providing professional Discovery Design Research services.

Preferred Skills/Experience for Discovery Design Research team:

- 8 years or more experience managing and executing on design research projects.
- Extensive experience in design thinking methodologies, user-centered design, user experience and research.
- Extensive experience planning design ethnographic user experience research and identifying target users.
- Extensive experience with user-centered analysis techniques.
- Extensive experience in producing project plans, goal statements, success criteria, potential risks and suggested mitigations,
- Knowledge of technical Product Management concepts.
- Knowledge of agile/Agile software development, infrastructure, and web technologies.
- Familiarity with documenting process flows and analyzing process improvements.
- Ability to engage with stakeholders to suggest and communicate requirement priorities.
- Excellent communication and presentation skills.

Proposal Submission

Proposal

Submissions should be 5 pages or less, excluding team resume and portfolios. Submissions should include:

1. Tentative generative user research plans, including
   - Recruitment strategy for market segments including everyday New Yorkers "target market", and NYC Government Agency staff. It is expected that any user research with everyday New Yorkers is compensated fairly; costs for recruitment and compensation will be the responsibility of the vendor.
   - Research synthesis plans

2. Description of proposed approach to create user journey maps of current state processes, and provide examples of previous service mapping deliverables (please use redacted and/or mock data)
3. Description of proposed approach to develop design recommendations based on analyzing user needs and provide examples of similar previous work
4. Proposed team structure with name and resume for all team members. Teams must include at least one Project Manager, User Research Lead, and Service Design Lead.

Evaluation Criteria

The following criteria and weighed scoring will be used to assess vendors:
- **Completeness**: Did the vendor submit all materials requested in solicitation response? (10%)
- **Experience**: Does the vendor team have skills and experience required for this project? (30%)

- **Timeliness**: Does the vendor anticipate completing the work per the City's expected timeframe? (20%)
- **Project Design Quality**: Did the vendor submit a proposal with a viable and sound user research and design methodology that incorporates all elements of the project scope? (40%)