



## Initial Project Proposal: Improving customer experience through digitization of forms

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The [21st Century IDEA](#) was signed into law in December 2018. The Act directs Federal agencies to make any paper-based forms used in serving the public available in a digital format. The Act also directs agencies to identify the non-digital services with the greatest impact that could be made available to the public through an online, mobile-friendly, digital service option in a manner that decreases cost, increases digital conversion rates, and improves customer experience. This proposal is intended to assist agencies with discovery research, prioritization, and implementation of projects to comply with the 21st Century IDEA.

Before you submit the form below, contact the TMF Program Management Office at [tmf@gsa.gov](mailto:tmf@gsa.gov). We will set up some time to meet via video conference. In that informal meeting, we will:

1. Walk through an overview of the investment process at the TMF.
2. Give you an opportunity to ask questions.
3. Ask clarifying questions about your proposal and begin to fill out this form to generate a draft Initial Project Proposal (IPP).

After the meeting, your team can fill in any additional details. Your team may request additional review from the PMO by sending your IPP as a .docx file back to the TMF PMO ([tmf@gsa.gov](mailto:tmf@gsa.gov)). If your IPP is complete and has your agency's approval, please email the final copy to [tmf@gsa.gov](mailto:tmf@gsa.gov), and CC the OMB TMF team, [ombtmf@omb.eop.gov](mailto:ombtmf@omb.eop.gov).

If the Board accepts your IPP, the next step is to fill out a more in-depth [Full Project Proposal](#) (FPP). You'll have an opportunity to share much more information about your project in the FPP.

If you aren't ready to fill out all the information in this proposal, you can share early phase information with our team at <https://tmf.cio.gov/start/> instead.

We look forward to partnering with you on your project!

# Improving customer experience through digitization of forms

Submission Date:

<b>Sponsoring Agency or Agencies</b>	Agency (required)
<b>Primary Point of Contact</b>	Name Here
<b>Executive Sponsor 1</b>	Name Here
<b>Executive Sponsor 2</b>	Name Here

## BASICS

### What is the problem the team is looking to solve?

Our agency needs to digitize forms that currently exist only in paper or PDF formats. Our goal is twofold: to reduce the time burden on members of the public who use the forms in order to access benefits and services, and to save staff time and taxpayer money by making the forms easier to process.

### Who is affected by this issue and how are they affected?

[Agency to insert more: who are the users of the form(s)? Include “end-users,” such as the member of the public who fills out the form, as well as agency personnel who intake the form, and any other users. What does the form enable the users to access? What specific use cases are you interested in resolving?]

### What phase of this work are you applying for funding for?

*Delete the paragraphs that are not relevant.*

**Phase 1 (Initial Evaluation):** Our Agency needs to conduct an initial discovery project so we can understand which forms should be prioritized for digitization or elimination.

**Phase 2 (Plan Development):** Our Agency has done research and already knows what forms require updating [please attach any relevant supporting documentation, including your research methodology]. We need to develop a plan for digitizing the forms from both a technology perspective as well as content and design considerations. We have identified several forms to update based on [explain your prioritization criteria, e.g., number of forms submitted per year, complexity of forms (additional documentation needed, multiple signatures), impact of the forms, complexity of the digitization process, unique needs of the form users]: [list forms; please attach a copy of the forms or note their OMB control numbers].

**Phase 3 (Project Continuation):** We have begun the process of digitizing the identified forms, [but we need additional resources to continue this work] [and we also want to increase our capacity to digitize a service associated with the forms].

**How will you measure success?**

[Include any relevant metrics].

## **FUNDING**

Project Teams (and budget) must account for at least 2 FTE via term or permanent hire, and/or budget for fellowship programs.

**What is the overall projected cost of the project?**

\$###.# Million

**What is the expected duration of the project?**

Your answer here.

**What is the \$ amount of funding you are requesting from the TMF?**

\$###.# Million

**What is the expected repayment percentage?** *Repayment percentages vary. Provide justification for anything less than 100 percent.*

Your answer here.

**Are there any sources of direct cost savings that will be used to repay the TMF investment?**

(e.g. printing and storage; manual data entry; lower call center volume)

## **ENABLING SUCCESS**

The Technology Modernization Fund provides investment support beyond simple cash investment. To that end, we would like to understand where the risks and opportunities are in terms of your agency's capacity to tackle the problem you've outlined in this proposal. We'll talk through this a bit further during our first meeting. **Proposals will not be penalized for requesting assistance or not having completed these project elements yet;** this information will help us determine where the TMF PMO and Board may be able to provide the best project guidance and support from a non-monetary perspective. *Check all statements that apply.*

**Has your team done user research?**

- No, our team has not done user research
- Our agency solicited user feedback to evaluate an existing product or process in the last 6 months — qualitatively, such as from focus groups or users, or quantitatively, such as surveys

- Generative, exploratory, or discovery user research was conducted in the past 18 months with internal staff or via a procurement team
- User feedback was shared informally with program leadership (e.g. at conferences or through professional association)
- Our team received feedback or learned of specific concerns from another office in our agency within the past year that need to be addressed
- Other (please explain)

**Does your project use a digital [analytics](#) program?**

- We have an analytics program for our public websites
- We have an analytics program for authenticated websites
- We are actively leveraging analytics data for this and/or past projects

If yes to any of the above, provide a brief description of the analytics data and program you are using:

**Has your team connected with teams undertaking similar projects, either within or external to your agency?**

- We are in contact with teams working on similar projects
- We are part of a working group or community of practice that discusses this subject broadly
- We are not in contact with other teams working in this space

Please provide a brief description of who you're working with, if applicable:

**Do you have sufficient staffing/labor resources to perform this work?**

- Our project team has 2 or more term or permanent FTE who are fully dedicated to this work
- Our team has contracting staff available to support this work
- We plan to augment our staff with a Presidential Management Fellow or Presidential Innovation Fellow
- Our team has an agreement to partner with technologists from US Digital Service, 18F, or our agency digital services team
- We need to hire additional term or permanent FTE

**Will this project involve procurement?**

- No, we have sufficient staffing and technology resources in place
- We have existing procurement vehicles or IDIQ to support this work
- Our agency's procurement office can support us with the necessary procurement activities
- Our agency's procurement office does not have experience in projects related to user research and/or agile software development, and needs additional support
- The procurement involved in this effort is DITAP certified

**Have you identified your technology stack?**

- No, we have not identified our technology stack
- We have identified our technology stack
- We have a prototype
- We already have a form-builder in production

**Are there any other risks to implementation of this project?**

(e.g., policy, regulatory, or legal barriers; lack of executive sponsor or support; competing priorities; project is dependent on buy-in from an external stakeholder, such as another program, agency, or non-federal entity)

**[END OF PROPOSAL FORM]**