

## Technology Oversight Committee Quarterly Report (July – September 2019)

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### **PART I – Technology Project Oversight in the City of Portland**

July – September 2019

#### **Background**

On February 2, 2011, City Council approved Resolution #36844 creating an independent five-member citizen committee for City of Portland technology projects. On April 20, 2011, City Council adopted changes to City Code Chapter 3.15.010 and Chapter 3.15.070 to establish the duties and authorities of the Chief Administrative Officer and Chief Technology Officer respectively as they relate to Technology Project Oversight. On June 29, 2011, Council adopted an update to BTS Administrative Rule (A.R.) 4.01 – Technology Project Intake as well as a new rule (BTS A.R. 1.07) on Technology Project Oversight.

As stated in BTS A.R.1.07, technology project oversight for the City of Portland includes the following components:

- Citizen Oversight
- Quality Assurance
- Project Management

#### **Citizen Oversight**

The citizen members of the Technology Oversight Committee (TOC) are:

<u>Selected by</u>	<u>Member</u>
Mayor Wheeler	Wilfred Pinfeld, PhD, CEO urban.systems, Inc.
Commissioner Eudaly	Jimmy Godard
Commissioner Fish	Leland Knell
Commissioner Fritz	Dyanna Garcia
Commissioner Hardesty	Victoria Trapp Strategic Business Consultant, ATUM Group

#### **Quality Assurance**

Quality Assurance (QA) – provided by external contractors – is a required component of the City’s technology project oversight. The role of the QA consultants on a project overseen by the TOC is to provide guidance and oversight to the City staff on the technology project, but ultimately to report the QA’s unbiased findings to the TOC.

**Project Management**

Staff from Office of Management & Finance (OMF) Business Operations and OMF Bureau of Technology Services provide committee support and technical expertise to the TOC.

There were no major developments this quarter. All the templates and tools are working well.

**Projects under TOC Oversight**

- Portland Online Permitting System (POPS)
- Open and Accountable Elections (OAE)

**Projects under TOC Review**

- Integrated Tax System (ITS): TOC received a formal introduction to the project in September, and will begin overseeing this project soon.
- Portland Oregon Website Replacement (POWR): TOC received a quarterly update in September.

## **PART II – Summary of Technology Projects under TOC Oversight**

July – September 2019

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**Project name:** **Portland Online Permitting System (POPS)**  
**Bureau:** Bureau of Development Services (BDS)  
Bureau of Technology Services (BTS)

### **Project Description:**

This project develops a paperless permit and case management process and allows complete, online access to the permitting and case review services. Project deliverables include digitization and online access of historical permits and property information, implementation of an updated permit and case review information management system, online case and permit application and review services, mobile online access for field staff, and implementation of an automated queuing system.

### **Major accomplishments this quarter:**

- Development Hub PDX Phase 1 was launched on July 1, and the legacy site was retired on August 2.
- AMANDA informational roadshows for staff have been successful and the project team has received positive feedback.
- Project Manager was hired for stakeholder readiness planning.
- Inspection scheduling production parallel is ongoing with no issues reported.
- Currently evaluating Contractor App functionality to be included as part of Development Hub.
- Inspector App testing and development is underway along with field testing and ride-longs with inspectors.

### **Upcoming milestones next quarter:**

- Conduct stakeholder readiness sessions.
- Develop POPS governance proposal.
- Finalize the plan for AMANDA go-live in Q1 2020.

### **Risks, concerns, comments from TOC:**

The go-live date for the AMANDA 7 release has been pushed back for a third time, extending the anticipated release date to February 2020. The TOC agrees with staff's decision to delay the release to ensure business readiness as well as technology readiness.

**Project Name:** Portland Online Permitting System (POPS)  
**Bureau:** Bureau of Technology Services, Bureau of Development Services  
**Reporting Date:** 23 September 2019

	Initial Estimate at TOC Intake 10/10/2017	Planned at Baseline	Current Revision 9/17/2019	QA Assessment			TOC Assessment		
Expected Completion	9/30/2018		11/4/2019	July	Aug	Sept	July	Aug	Sept
Confidence Level	Medium		Very low	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
<b>Budget</b>	TBD		\$11,997,231	Yellow <i>(cost)</i>	Yellow <i>(cost)</i>	Yellow <i>(cost)</i>	Green	Yellow <i>(cost)</i>	Yellow <i>(cost)</i>
Confidence Level	TBD		High	Green <i>(budget)</i>	Green <i>(budget)</i>	Green <i>(budget)</i>		Green <i>(budget)</i>	Green <i>(budget)</i>
<b>Scope Stability</b>	Medium		High	Yellow	Yellow	Yellow	Green	Yellow	Yellow
Confidence Level				Yellow	Yellow	Yellow		Yellow	

**Project name:** Open and Accountable Elections (OAE)  
**Bureau:** Commissioner Fritz's Office

**Project Description:**

This program matches small donations from Portland residents to ensure that all Portlanders can have an impact on City elections. Candidates who participate must agree to comply with program rules, which includes not accepting large contributions and agreeing to a fundraising and spending limit. These candidates can collect 6:1 matched contribution from the Open and Accountable Elections Fund, up to \$50 per donor. OAE provides public money to viable candidates who demonstrate significant support from Portlanders. It reduces the perceived influence of big money from private major donors as a factor in winning City elections, while encouraging candidates and donors from all over Portland to participate in a truly open and accountable campaign financing system.

**Major accomplishments this quarter:**

- Campaigns began reporting to OAE on September 14.
- Civic Software Foundation delivered all components needed for implementation of Plan B on September 8.
- Module 1 (User Management & Infrastructure) was completed in August.
- Module 2 (Campaign Donation Submission) was completed in August.
- Module 4 (Expenditure Submission & Approval) was completed in September.
- API and data science for Module 3 (City Donor Verification & Match Engine) was completed in September.
- The following QA recommendations were completed: risk identification plan, formal multi-year budget, City contingency plans for late delivery, and task orders.

**Upcoming milestones next quarter:**

- Complete the Quality Assurance recommendation for user acceptance plan and regression testing.
- Completion of Module 3 (City Donor Verification & Match Engine).
- Completion of Module 5 (Reporting & Auditing).
- Civic Software Foundation to identify volunteers to help complete Modules 6 and 7.
- Civic Software Foundation to identify support contractors.

**Risks, concerns, comments from TOC:**

TOC has always believed the timeline for this project was ambitious. Last quarter they said they would be less concerned about the project's delivery if a contingency plan was finalized and any costs associated with any necessary manual entries were identified. Both of these things happened in the last quarter. Although all the project deliverables have not been received on time, TOC is cautiously optimistic about a successful project implementation. They have rated Open and Accountable Elections yellow, and continue to keep a close eye on this project.

**Project Name:** Open and Accountable Elections (OAE)  
**Bureau:** Commissioner Frtiz's Office  
**Reporting Date:** 23 September 2019

	<b>Initial Estimate at TOC Intake 10/10/2017</b>	<b>Planned at Baseline</b>	<b>Current Revision 7/16/2019</b>	<b>QA Assessment</b>			<b>TOC Assessment</b>		
				July	Aug	Sept	July	Aug	Sept
<b>Expected Completion</b>	9/1/2019		9/1/2019						
Confidence Level	Medium		Medium	Red	Red	Red	Red	Red	Yellow
<b>Budget</b>	\$347,750		\$347,750	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Confidence Level	High		High	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
<b>Scope Stability</b>	Medium		High	Green	Yellow	Yellow	Green	Green	Yellow
Confidence Level				Green	Yellow	Yellow	Green	Green	Yellow