

Technology Oversight Committee Quarterly Report (October – December 2018)

PART I – Technology Project Oversight in the City of Portland October – December 2018

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 Pinfold, PhD CEO urban.systems, Inc.
Commissioner Eudaly	Jimmy Godard
Commissioner Fish	Ken Neubauer Director Platform Engineering, Standard Insurance
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 Completed

- City Budget Office software replacement, Budget Formulation Management (BFM)

Projects under TOC Oversight

- Portland Online Permitting System (POPS)

New Projects under TOC Oversight

- TOC has recently started monitoring the Portland Oregon Website Replacement (POWR) project and will be overseeing the Integrated Tax System (ITS) project in spring 2019.

PART II – Summary of Technology Projects under TOC Oversight

October – December 2018

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:

- Completed Development Hub Train the Trainer for Admin and BSA's.
- Began Development Hub QAT.
- Developed Support Plan for Development Hub.
- Received Phase II priority projects from stakeholders.
- Completed Change Management, Communication and Training Plans.
- Completed first cycle of Electronic Plan Review pilot projects.
- Conducted Inspector App Vendor-led training for QAT testers.

Upcoming milestones next quarter:

- Development Hub soft launch Jan 2019.
- Electronic Plan Review expansion to all Processed Managed projects.
- AMANDA 7 testing completed.
- Complete Support Plans for AMANDA, Inspection Scheduling and Inspector App.
- Begin POPS Intake and Governance plan development.

Risks, concerns, comments from TOC:

- BDS staff conducted a comprehensive project orientation for TOC members in November, which provided an in-depth look at the different project components. TOC members feel substantially more confident in the POPS project than they did at the last quarterly update.

Exhibit A

Project Name: Portland Online Permitting System (POPS)
Bureau: Bureau of Technology Services, Bureau of Development Services
Reporting Date: 17 December 2018

	Initial Estimate at TOC Intake 10/10/2017	Planned at Baseline	Current Revision 10/15/2018	QA Assessment			TOC Assessment		
Expected Completion	9/30/2018		TBD	Oct	Nov	Dec	Oct	Nov	Dec
Confidence Level	Medium		Medium	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Budget	TBD		\$11,997,231	Yellow	Green	Green	Yellow	Yellow	Green
Confidence Level	TBD		Medium						
Scope Stability Confidence Level	Medium		Medium	Yellow	Yellow	Yellow	Yellow	Yellow	Green

Project name: **Budget Formulation Management (BFM)**
Bureau: City Budget Office (CBO)

Project Description:

This project replaces the City's current budget software system, BRASS, with Budget Formulation Management (BFM). BFM is a cloud-based application managed by Sherpa Government Solutions (Sherpa). Sherpa shall design, build, install and support BFM for the City to meet the City's enterprise wide budget management needs. The scope of this project includes: full conversion of BRASS data, combining the currently separate databases for BMP and Production into a single repository; form development; personnel and benefits costing/forecasting; capital project budgeting; performance management; integration with the City's enterprise resource planning system, SAP; and integration with the City Budget Office's (CBO) publishing software, Patternstream.

Major accomplishments this quarter:

- Basic reports and budget development forms completed.
- uPerform training documents delivered.
- All SAP interfaced moved to production.
- Master Data, Current Year Actuals, and Revised budget uploaded.
- Pilot test completed.
- CBO Advanced User Training completed.
- BFM went live on December 7, 2018.

Upcoming milestones next quarter:

- Monitor and troubleshoot as needed.

Risks, concerns, comments from TOC:

- TOC members are pleased with this project's implementation and have no concerns. Staff will return to TOC in 90 days for a status update report.

Exhibit A

Project Name: BFM Implementation
Bureau: City Budget Office
Reporting Date: 17 December 2018

	Initial Estimate at TOC Intake	Planned at Baseline	Current Revision	QA Assessment			TOC Assessment		
	4/16/2018	8/21/2018							
Expected Completion	12/1/18	12/1/18		Oct	Nov	Dec	Oct	Nov	Dec
Confidence Level	Medium	Medium		Yellow	Green	Green	Green	Green	Green
Budget	\$1,080,000	\$869,530		Yellow	Green	Green	Green	Green	Green
Confidence Level	TBD	Medium							
Scope Stability Confidence Level	Medium	Medium		Yellow	Yellow	Green	Green	Green	Green