

Technology Oversight Committee Quarterly Report (April – June 2019)

PART I – Technology Project Oversight in the City of Portland

April – June 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)
- Portland Oregon Website Replacement (POWR)
- Open and Accountable Elections (OAE)

New Projects under TOC Oversight

- TOC will be overseeing the Integrated Tax System (ITS) project in summer 2019.

PART II – Summary of Technology Projects under TOC Oversight

April – June 2019

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:

- Submitted SBAR for PDX ePlans Phase 1 completion.
- Adoption of MS Planner, Teams and Jira for project management and testing tracking
- Held a 2-day POPS Leadership Team training.
- Completed Second round of business testing for AMANDA Version 7 migration.
- Updated budget projection to account for schedule extension and expenses
- Evaluation of AMANDA 7.4.0 as release candidate

Upcoming milestones next quarter:

- Development Hub PDX grand opening scheduled for July 1.
- Inspection scheduling production parallel on July 1.
- Staff will be working on a POPS governance proposal in conjunction with the Technology Executive Steering Committee in August.
- Advanced AMANDA training is scheduled for July – September.

Risks, concerns, comments from TOC:

The “go live” date for the AMANDA 7 release has been pushed back for a second time, but TOC agrees with staff’s decision that even though the technology will be ready sooner, ensuring business readiness is of critical importance. TOC respects BDS’s transparency about risks and the team’s focus on making sure implementation is successful.

Exhibit A

Project Name: Portland Online Permitting System (POPS)
Bureau: Bureau of Technology Services, Bureau of Development Services
Reporting Date: 24 June 2019

| | Initial Estimate at TOC Intake 10/10/2017 | Planned at Baseline | Current Revision 6/24/2019 | QA Assessment | | | TOC Assessment | | |
|------------------------|---|---------------------------|----------------------------------|---------------|--------------------------|--------------------------|----------------|--------|--------|
| Expected Completion | 9/30/2018 | | 11/4/2019 | April | May | June | April | May | June |
| Confidence Level | Medium | | High | Yellow | Yellow | Yellow | Yellow | Yellow | Yellow |
| Budget | TBD | | \$11,997,231 | Green | Yellow <i>(cost)</i> | Yellow <i>(cost)</i> | Green | Green | Green |
| Confidence Level | TBD | | High | | Green <i>(budget)</i> | Green <i>(budget)</i> | | | |
| Scope Stability | Medium | | High | Yellow | Yellow | Yellow | Green | Green | Green |
| Confidence Level | | | | | | | | | |

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:

- Draft user design mockups were completed in May on time.
- Civic Software Foundation completed engineering and data science documentation in May.
- New QA consultant was brought on in May.
- Back end API functionality on Module 1 was completed on 6/1.
- User interviews with 20 community members to develop product that is responsive to all user needs.
- Advanced data science and fraud detection completed that other cities don't have.
- Successfully brought on two additional full time senior architects to help make up for front end delays and increase the odds of an on-time delivery for all functionalities related to City administration of the program.

Upcoming milestones next quarter:

- Risk management plans completed for contingency plans.
- Complete user acceptance test plans for each module.
- Complete campaign donation submission page designs.
- Front end completion.
- Completion of Modules 2, 3, 4, and 5, to allow City to move forward with Plan A implementation.

Risks, concerns, comments from TOC:

- TOC has always believed the timeline for this project was ambitious, but as long as contingency planning is finalized within the next couple of weeks and funding for any necessary manual entries is identified TOC believes this project can be implemented by the Sept 1 deadline. Although TOC would have liked to have seen a QA consultant on board much earlier in the project, they feel much more confident since Cliff Smith began monitoring the project in May.

Project Name: Open and Accountable Elections (OAE)
Bureau: Commissioner Frtiz's Office
Reporting Date: 24 June 2019

| | Initial Estimate at TOC Intake 10/10/2017 | Planned at Baseline | Current Revision 6/18/2019 | QA Assessment | | | TOC Assessment | | |
|------------------------|---|---------------------------|----------------------------------|---|--------|--------|----------------|-------|-------|
| Expected Completion | 9/1/2019 | | 9/1/2019 | April | May | June | April | May | June |
| Confidence Level | Medium | | Medium | Not enough information available to rate. | Yellow | Yellow | Red | Red | Red |
| Budget | \$347,750 | | \$347,750 | Not enough information available to rate. | Green | Yellow | Yellow | Green | Green |
| Confidence Level | High | | High | | Green | Yellow | Yellow | Green | Green |
| Scope Stability | Medium | | High | Not enough information available to rate. | Yellow | Green | Yellow | Green | Green |
| Confidence Level | | | | | Yellow | Green | Yellow | Green | Green |