

RESOLUTION No. 37435-

Declare temporary moratorium on new program requests and significant changes to existing programs in the Revenue Division of the Bureau of Revenue and Financial Services to ensure successful implementation of the Integrated Tax System (Resolution)

WHEREAS, The City Council authorized funding for an Integrated Tax System (ITS) Project Manager and a Business Systems Analyst in the Revenue Division's FY2017-2018 budget, kicking off the ITS project. These positions were authorized to begin the work necessary to replace the Revenue Division's multiple aging tax administration databases with a single modern off-the-shelf solution.

WHEREAS, The ITS project team documented business processes and functional and technical requirements over the course of the first year of the project, laying the ground work for a Request for Proposals (RFP).

WHEREAS, The ITS project team, working with Procurement Services, released an RFP in November 2018.

WHEREAS, The Revenue Division has selected a vendor, FAST Enterprises, LLC, to implement ITS and the Chief Procurement Officer (CPO) is bringing a companion Report to Council recommending the contract award.

WHEREAS, Assuming City Council accepts the CPO's Report on June 19, 2019, the project will have two phases. Phase 1, Implementation, is expected to commence in July or August 2019 and last 13 months, culminating in the cutover to the new ITS platform by August 2020. Phase 2, Stabilization, is expected to be completed by July 2021.

WHEREAS, A best practice in large-scale software replacement projects is to halt development of new functionality in the software to be retired, and to refrain from increasing scope in the form of new requirements to the replacement software during the Implementation Phase. This best practice is to ensure that software architecture and requirements are not changing over the course of the project, thereby ensuring the highest likelihood of a successful implementation.

WHEREAS, The City Council, in recognition of this best practice, agrees to impose a temporary moratorium on requesting new programs and significant changes to existing programs in the Revenue Division of the Bureau of Revenue and Financial Services during Phase I of the ITS project.

WHEREAS, Exceptions to this moratorium include the continued implementation of the City's new Rental Registration and Clean Energy Surcharge programs. An exception will also be made for possible changes to the City's existing personal income tax (Arts Tax).

NOW, THEREFORE, BE IT RESOLVED, The City Council declares a moratorium on requesting new programs and significant changes to existing programs in the Revenue Division during Phase I of the ITS project (effective today through August 31, 2020).

BE IT FURTHER RESOLVED, The City Council authorizes the Revenue Division Director to extend this moratorium for up to an additional six (6) months after Phase I ends as may be necessary to make Phase 2, Stabilization, more successful.

Adopted by the Council:

JUN 19 2019

Mayor Ted Wheeler

Prepared by: Thomas Lannom

Date Prepared: May 14, 2019

Mary Hull Caballero

Auditor of the City of Portland

By



Deputy

605

Agenda No. _____ No. 37435
 Item Type: Resolution
 Council Meeting Date: June 19, 2019

Title: Declare temporary moratorium on new program requests and significant changes to existing programs in the Revenue Division of the Bureau of Revenue and Financial Services to ensure successful implementation of the Integrated Tax System (Resolution)

AGENDA TYPE

☐ Consent☒ Regular☐ Time Certain Start Time

Item 2 of 2

Total amount of time needed for presentation, testimony and discussion (Regular and Time Certain Only): 10 Minutes

INTRODUCED BY: Mayor Wheeler

COMMISSIONER / AUDITOR APPROVAL

Mayor - Finance & Admin. - Wheeler Digitally signed by Mustafa Washington
Date: 2019.06.11 11:52:01 -0700

Position 1/ Utilities - Fritz

Position 2/ Works - Fish

Position 3/ Affairs - Hardesty

Position 4/ Safety - Eudaly

City Auditor - Hull Caballero

1) Is a completed Impact Statement attached? ☒ Yes3) Is the item a Code ordinance? ☐ Yes ☒ No

If yes, Auditor Office Approval

5a) Is item a Portland Policy Document or Administrative Rule?

☐ Yes ☒ No

BUREAU APPROVALS

Bureau: OMF/BRFS

OMF/CAO: Tom Rinehart Digitally signed by Tom Rinehart
Date: 2019.05.28 15:31:44 -0700Bureau Approval: Jennifer Cooperman Digitally signed by Jennifer Cooperman
Date: 2019.05.28 15:07:01 -0700

Prepared By: Thomas Lannom

Date Prepared: May 24, 2019

2) Does the item amend the budget? ☐ Yes ☒ No
If yes, Budget Office Approval4) Is this item a contract (current or future), code, easement, franchise, comp plan or Charter? ☐ Yes ☒ No
If yes, Attorney Office Approval5b) If yes, is the City Policy/Admin Rule directive in the ordinance or resolution? ☐ Yes ☐ No

ACTION TAKEN:

CLERK USE: DATE FILED 6/11/19

Mary Hull Caballero
Auditor of the City of Portland

By: Keelan McClymont Digitally signed by Keelan McClymont
Date: 2019.06.11 14:23:56 -0700
Deputy

FOUR-FIFTHS AGENDA

1. Fritz
2. Fish
3. Hardesty
4. Eudaly
Wheeler

COMMISSIONERS VOTED AS FOLLOWS:

	YEAS	NAYS
1. Fritz	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Fish	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Hardesty	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Eudaly	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wheeler	<input checked="" type="checkbox"/>	<input type="checkbox"/>