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591-2021

Report

Accept the Quarterly Technology Oversight Committee Report from the Chief Administrative Officer

Accepted

PART I – Technology Project Oversight in the City of Portland (April — June 2021)

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:

Mayor Wheeler - Wilfred Pinfold

Commissioner Mapps - Jimmy Godard

Commissioner Ryan - Leland Knell

Commissioner Rubio - Dyanna Garcia

Introduced by

[Mayor Ted Wheeler](#)

Bureau

[Management and Finance](#)

Prepared by

Laurie Levy

Date Prepared

July 8, 2021

Requested Agenda Type

Time Certain

Commissioner Hardesty - Victoria Trapp

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

- Integrated Tax System (ITS)

Projects under TOC Review

- No new projects under TOC Review this quarter.

PART II –

Summary of Technology Projects under TOC Oversight (April — June 2021)

Project name: Integrated Tax System (ITS)

Bureau: Office of Management & Finance

Project Description:

The project will implement an integrated tax system solution that provides portal self-service and eFiling for users and stores Federal Taxpayer Information (FTI). Deliverables include a customer-centric interface and a system that integrates data from multiple data sources and satisfies requirements for tax administration of all current and future tax types.

Major accomplishments April through June 2021 (please see Exhibit A attached for scoring on accomplishments):

Status for the R2 and R3 releases:

- Phase R2: Go-Live was successful on March 29, 2021. All in all, it was a “dull and boring rollout,” which is described by project staff as the best kind of rollout. Although R2 is mostly completed without QA engaged, the team is pleased to report that QA contracting is now resolved, and MC² are fully re-engaged for Phase R3.
- Phase R3: Definition meetings were paused during the weeks surrounding the R2 Go-Live but have now resumed and have concluded. The R3 scope is similar in size to R1, so the discussion

topics and definition items were more involved. The guiding principle of this project is to significantly emulate existing Business Tax design in ITS. The QA Team has returned to the project after a three month delay due to contracting. The second rollout, Phase R2, was completed and transitioned into production on March 29th. Phase R3 started in parallel with R2, and definitions and configuration are in progress.

- R3 Definition Phase concluded on May 28th.
- SMEs have signed off on Definition items (requirements work product).
- Tax form design continues.
 - Multiple new forms, permutations for part-year or non-resident filers.
 - 2d barcode schemas and MeF schemas are in progress for these forms.
 - Working with tax prep vendors to implement our forms in their software for either 2d barcode support, MeF support, or both.
- Reports: Conversations with stakeholders about report requirements have started.
 - Immediate desire for disbursement reports.
 - R3 reports will emulate R1 reports where possible.
 - External stakeholder adoption of R1 reports is gradual, potentially impacting R3 reporting downstream (low risk).
- Including some portion of Fraud Manager in R3 scope.
 - Originally scheduled for R4.
 - Verifies withholding before refund approval.

Upcoming milestones next quarter:

- Complete forms work, continue Reporting discussions
- Definition Freeze is beginning
- Focus is now on the Development stage of FAST methodology, as well as preparing for Test (securing resources, e.g. 12 testers)
- The team is also starting to share more project information (demos of new screens, and the new forms) with staff, involving end users with a high level of engagement for project work.

Risks, concerns, comments from TOC:

No new risks, concerns, or comments from the TOC.


PART III – Summary of Technology Projects under TOC Review (April — June 2021)

No new technology projects under TOC review at this time.

Documents and Exhibits

 [Exhibit A](#) (142.91 Kb)

Impact Statement

 [Impact Statement](#) (179.06 Kb)

Agenda Items

591 Time Certain in [July 28-29, 2021 Council Agenda](#)

Accepted

Motion to accept the report: Moved by Wheeler and seconded by Hardesty.
Commissioner Jo Ann Hardesty Yea

Commissioner Mingus Mapps Yea

Commissioner Carmen Rubio Yea

Commissioner Dan Ryan Yea

Mayor Ted Wheeler Yea

General information

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