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881-2022

Report

Accept the Technology Oversight Committee Quarterly Report

Accepted

Technology Oversight Committee
 Quarterly Report to Council
 Quarter 3, 2022

PART I – Technology Project Oversight

Background

On February 2, 2011, City Council approved Resolution #36844 creating an independent five-member citizen committee for City of Portland technology projects. On July 12, 2019, City Council adopted changes to City Code Chapter 3.15.090 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 (AR) 4.01 – Technology Project Intake as well as a new rule (BTS AR 1.07) on Technology Project Oversight.

As stated in BTS Administrative Rule 1.07, technology project oversight for the City of Portland may include citizen oversight and quality assurance. A component of project oversight will be addressed through ongoing review from an independent citizen Technology Oversight Committee (TOC) that serves in an advisory capacity to the City's Chief Administrative Officer (CAO). A component of quality assurance will be addressed by having City bureaus contract for services with a qualified, external quality assurance firm for technology projects overseen by the TOC.

Citizen Oversight

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

Representing	Member
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Introduced by

[Mayor Ted Wheeler](#)

Bureau

[Management and Finance](#)

Contact

Jeff Baer

 Chief Technology Officer and
 Director of BTS

 ✉ jeff.baer@portlandoregon.gov

 ☎ [503-823-5540](tel:503-823-5540)

Requested Agenda Type

Time Certain

Date and Time Information

Requested Council Date

October 26, 2022

Requested Start Time

10:45 am

Time Requested

15 minutes

Representing	Member
Mayor Wheeler	Dr. Wilfred Pinfold - CEO Urban.Systems Inc.
Commissioner Mapps	Dr. Jimmy Godard
Commissioner Ryan	Leland Knell
Commissioner Rubio	Dyanna Garcia
Commissioner Hardesty	Victoria Trapp

Quality Assurance

Quality Assurance (QA) – provided by external contractors – is a required component of projects under the purview of the TOC. 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 and included in the Quarterly Report to Council.

Responsibilities

The TOC is staffed by the Office of Management & Finance (OMF) Business Operations Division. OMF Bureau of Technology Services (BTS) provides expertise to support the TOC through the duration of projects overseen by the TOC. Customer bureaus whose projects are under the purview of the TOC are responsible to provide accurate and timely project information to OMF and the TOC from the time of project intake through TOC monitoring to project completion.

PART II – Technology Projects under TOC Oversight

Office 365 Implementation project

Portland Police Bureau

Project Description

The goal of this project is to provide the Police Bureau with the ability to collaborate with the rest of the City using the Microsoft Office 365 product. Police email accounts will be migrated to Office 365 and eliminate the need to replace their on-premises Exchange email servers that have reached end of life.

The project will be completed in phases:

1. Phase I – Discovery
2. Phase II – Pilot, Testing, and Migration
3. SharePoint Online

The project finished Phase I and is now in Phase II. The project team is confident in their ability to remain on-schedule.

Major accomplishments July through September 2022

The most notable accomplishment is that this project has once again secured a green rating for its schedule, having overcome its delays in Phase I. It also finalized an implementation schedule for their cutover to Office 365, finalized a training plan, reviewed app compatibility, and various other logistical tasks (licensing, contacts, process). Other accomplishments include:

- Conducted kickoff with Advisicon
- Completed change management preparations
- Scheduled all staff town halls
- Finished pre-pilot administrative, technical, testing, and training tasks

Upcoming milestones

- Finish pre-pilot technical, testing, and admin training tasks
- First all staff town hall
- Pilot email migration
- Pilot user training
- Pilot O365 deployment
- Pilot user testing

Risks and concerns

- Cross tenant synchronization
- Schedule dependent on resources
- Time needed for migrating mailboxes will likely require schedule adjustments
- Time needed to configure SharePoint site

TOC & QA ratings (July - Sept 2022)

	Initial Estimate at TOC Intake 12/6/2021 *Request Phase	Planned at Baseline as of date 1/18/2022 *Request Phase	Planned at Baseline as of date 9/20/2022 *Implementation Phase	Current Revision date as of 9/20/2022	QA Assessment (completing contracting activities) Red, Yellow, Green			TOC Assessment Red, Yellow, Green		
					July *Research phase	Aug *Research phase	Sept *Implementation phase	July *Research phase	Aug *Research phase	Sept *Implementation phase
Expected Completion	Unknown	08/2022 *Research phase	07/2023* *Implementation phase	07/2023* *Implementation phase	Yellow	Yellow	Green	Yellow	Yellow	Green
Confidence Level		High	Low	Low						
Budget	\$756,954	\$756,954	\$793,662	\$793,662	Green	Green	Green	Green	Green	Green
Confidence Level	Medium	Medium	Low	Low						
Scope Stability	Medium	Medium	Low	Low	Green	Green	Green	Green	Green	Green
Confidence Level		Medium	Low	Low						

Note: Active employee PST migrations do not have to be finished prior to project conclusion, although they are likely to be.

Body-Worn Cameras project

Portland Police Bureau

Project Description:

The City has decided to adopt body-worn cameras to improve public trust, police accountability, risk management, and training opportunities. Council appropriated one-time funding of \$2.6M for the body-worn cameras program and Council approved the release of a Request for Proposals (RFP) on February 9, 2022. The TOC provided input on the RFP prior to being released.

PPB received four responses to the RFP (Motorola, Brite, Utility, and Axon) – Proposals were evaluated and scored on April 14. The evaluation team selected two vendor demos (Motorola and Axon) that were conducted on May 4 & 5 with a scoring meeting held on May 6. After demos were completed, Procurement issued a Notice of Intent to Negotiate to Axon on May 10. PPB staff began contract negotiations with Axon for the pilot phase in late May, however negotiations are still ongoing. PPB staff provided an a project overview and status update to the TOC on August 22.

Major accomplishments July through September 2022

The project team is moving forward with Axon as its vendor. There is still preliminary work to do before the project team starts presenting progress reports to the TOC. The team is continuing to work on the policy and is currently coordinating electrical and technology work in preparation for the pilot, which is estimated to begin January 1, 2023.

Record Management System (RMS) Project

Portland Police Bureau

Project Description:

This project will upgrade the Police Bureau's Record Management System, Versadex, such that files that are pushed to the vCloud for storage. The intent of this project is to streamline processes and reduce costs. A prior RMS project was suspended due to a loss of funds in 2020, so the Police bureau is behind by multiple software versions of this key platform. Both the Multnomah County Sheriff's Office and Gresham Police Department have made the switch to the vCloud.

Major accomplishments July through September 2022

The project's timeline is still unknown since projects like the Police Office 365 project and the Body-Worn Cameras project are a higher priority. The project will have a more clearly defined schedule upon kickoff. The tentative start date for this project is March 2023.

Infor Project

Portland Water Bureau, Bureau of Environmental Services

Project Description:

Currently there are multiple Asset Management Systems used across BES and PWB. Both BES and PWB have been using Oracle Utilities Work and Asset Management (OWAM) for managing assets. In BES this system is named Synergen and is in use for the treatment plant. Oracle discontinued its OWAM support in August.

Rather than update the multiple asset management systems of BES and PWB, both bureaus decided to form a combined team and solicit new vendors, ultimately selecting Infor and their application, Infor Public Sector (IPS). This project will migrate both BES (OWAM and IPS) and PWB (OWAM) assets onto a new cloud version of IPS.

Major accomplishments July through September 2022

Currently, the project team is negotiating a statement of work with Infor for implementation. Statement of work will define the scope, schedule, and budget for the initial implementation.

The project was informally introduced to TOC last month and is currently going through the intake process. The project team will also be selecting a QA vendor next quarter. The project team is working to define project workstreams, order of implementation and the structure of milestones and deliverables. It is also conducting stakeholder interviews, change impact assessments, and OCM project planning.

Impact Statement**Purpose of Proposed Legislation and Background Information**

This report covers the activity from October through December 2020. The report summarizes the status of the technology projects under the Technology Oversight Committee's (TOC) purview.

Financial and Budgetary Impacts

This action does not have any costs to the City.

This action does not affect current or future staffing levels.

This action does not create or modify any financial obligation.

Community Impacts and Community Involvement

The report will inform Council on the progress of the TOC. The community will benefit from the increased accountability and transparency of City technology projects.

The committee is made up of five members of the public who were each selected by a City Council member. These community members have been involved in creating the committee operating principles and procedures. They reviewed the draft of this report and provided feedback.

The continued involvement of public members is expected for the duration of this committee. Members of the TOC may testify at Council when the reports are presented.

Budget Office Financial Impact Analysis

No fiscal impact

Agenda Items

881 Time Certain in [October 21-27, 2022 Council Agenda](#)

Accepted

Motion to accept the report: Moved by Hardesty and seconded by Rubio.

Commissioner Mingus Mapps Yea

Commissioner Carmen Rubio Yea

Commissioner Dan Ryan Yea

Commissioner Jo Ann Hardesty Yea

Mayor Ted Wheeler Yea