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171-2023

(Report)

Accept the Technology Oversight Committee Quarterly Report

Accepted

Technology Oversight Committee

Quarterly Report to Council - Quarter 4, 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 (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 may include citizen oversight and quality assurance.

Citizen Oversight

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

Representing	Member
Mayor Wheeler	Dr. Wilfred Pinfold - CEO Urban.Systems Inc.
Commissioner Gonzalez	David Tunley
Commissioner Mapps	Dr. Jimmy Godard
Commissioner Ryan	Leland Knell
Commissioner Rubio	Dyanna Garcia

Quality Assurance

Introduced by

[Mayor Ted Wheeler](#)

Bureau

[Management and Finance](#)

Contact

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Director of BTS

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Requested Agenda Type

Time Certain

Date and Time Information

Requested Council Date
March 1, 2023
Requested Start Time
9:45 am
Time Requested
30 minutes

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.

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

Major accomplishments October - December 2022

The project is currently in Phase II and is slightly ahead of schedule. It continues its green rating across all QA measures. It has turned on legal holds, tested its records search capability, de-provisioned temporary licenses, completed training, completed user testing, finished deployment of O365 to the pilot group, finalized user testing, performed a pilot retrospective, obtained approval for technical changes, and has performed a full implementation decision gate.

Upcoming milestones

- Complete audit log admin training.

- Review/Revise sustainment plan.

- Make technical changes (if necessary).

Risks and concerns

- In some cases, archived emails were tested on a limited number of users. The time necessary for these tasks may require adjustment during the full migration.

- Inter-Org communication requires syncing users rather than contacts, which cannot be implemented until full implementation.

- There are challenges supporting an ever-changing MS environment.

- The schedule is highly dependent on resource availability.

- The duration of SharePoint site configuration is unknown until full migration.

Color ratings: Police Office 365 Project

	Initial Estimate at TOC Intake 12/6/2021 *Request Phase	Planned at Baseline as of date 1/18/2022 *Request Phase	Planned at Baseline 9/26/2022 *Implementation Phase	Current Revision date as of 11/28/2022	QA Assessment (completing contracting activities) Red, Yellow, Green			TOC Assessment Red, Yellow, Green		
					Oct	Nov	Dec	Oct	Nov	Dec
Expected Completion	Unknown	08/2022 *Research phase	07/2023* *Implementation phase	07/2023* *Implementation phase	Green	Green	Green	Green	Green	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						

(11/28/22)

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. BES has also used the Infor IPS product for over 15 years to manage collection systems assets and is named Hansen.

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 October - December 2022

This project has been introduced only informally to the TOC and has only had a partial rating done by QA, with no TOC rating yet. As such, a rating table has not yet been created. The project team will do a formal intro to the TOC once they have completed the setup for implementation and have project timelines in place, projected for March or April. Currently this project is in the execution phase. It is also in the process of negotiating a statement of work with Infor Public Sector for implementation. The team is working to define project workstreams, order of implementation, and milestone/deliverable structures for the implementation scopes of work.

Change management is creating the master change management strategy, conducting a change impact assessment, and finalizing its stakeholder analysis.

Risks and concerns

- Vendor transition has created communication gaps.

- Remote work during pandemic has created challenges.

- Current system (OWAM) is out of support.

- Program Manager has not been hired, there is currently an interim.

- Software vendor has not assigned a project manager for implementation, scheduled to start in January

- Project manager only working part-time.

- Software vendor does not use standard project management practices.

- Software vendor has not identified several key activities to achieve milestones (acceptance testing, data conversion).

- Incomplete staffing plan for all key internal staffing roles needed for implementation.

- Internal organizational change management (OCM) lead has not been designated to work with the consultant in the Overall OCM Lead role.

- The executive steering committee is not yet regularly engaged on the project.

- Current BTS Project Manager does not have adequate information to assess BTS resource requirements, is concerned about the lack of information available.

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.

Major accomplishments October – December 2022

The project team has chosen Axon as its vendor. There is still preliminary work to do on the policy before the project team starts presenting progress reports to the TOC.

Record Management System (RMS) Project
Portland Police Bureau

Project Description

This project will upgrade the Police Bureau's Record Management System (RMS), Versadex, such that files are pushed to the vCloud (vendors cloud solution) for storage. The intent of this project is to streamline processes and reduce support 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 solution.

Major accomplishments October – December 2022

The project's timeline is still unknown since projects like 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. Also, because the BOEC vCAD Upgrade to v7.6 project (a higher priority project using the same vendor and BTS teams), has been delayed a few months, the project timeline for starting this project could be impacted. The tentative start date for this project is currently March 2023 and will begin with planning and project timeline development. This project Status: Scheduled

Impact Statement

Purpose of Proposed Legislation and Background Information

This report covers activity from October through December of 2022. 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.

100% Renewable Goal

N/A

Budget Office Financial Impact Analysis

No fiscal impact. The report summarizes the status of the technology projects under the Technology Oversight Committee's purview from October through December of 2022 and includes risks and concerns.

Agenda Items

171 Time Certain in [March 1, 2023 Council Agenda](https://www.portland.gov/council/documents/report/accepted/171-2023)

Accepted

Motion to accept the report: Moved by Gonzalez and seconded by Ryan.

Commissioner Carmen Rubio Yea

Commissioner Dan Ryan Yea

Commissioner Rene Gonzalez Yea

Commissioner Mingus Mapps Absent

Mayor Ted Wheeler Yea