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163-2024

Report

Accept the Technology Oversight Committee Quarterly Report

Accepted

Technology Oversight Committee

This report to Council covers Q4 of 2023

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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Requested Agenda Type

Time Certain

Date and Time Information

Requested Council Date	February 21, 2024
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.

Major accomplishments April – December 2023

The project team issued its final report to the Technology Oversight Committee in June of 2023, and quality assurance assessment issued its final report the following October. It closed ahead of schedule and \$278K under budget. The scope was completed fully and the project received high scores across the board for its final report.

Risks

Project completed

Upcoming milestones

Project completed

Committee Rating

Project completed

Record Management System (RMS) Project

Portland Police Bureau

Project Description

This project will upgrade the Police Bureau's Record Management System (RMS), Versaterm, 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 in 2020 due to a loss of funds. Both the Multnomah County Sheriff's Office and Gresham Police Department have made the switch to the vCloud solution.

Major accomplishments July 2023 – January 2024

This project is finalizing Phase 1. The design phase is wrapping up in the first week of February and is going to its project steering committee for review. The last report to the Technology Oversight Committee was in December of 2023, and its last quality assurance assessment was in May of 2023. In December the project reported that a change management plan had been completed and that the project team had held an onsite/hybrid meeting in The Portland Building on Nov. 15th, 2023, where it reviewed an onboarding schedule with Versaterm, its contractor. A quality assurance assessment will be provided in Phase 2 of this project.

Risks

The project faced a risk to its scope, schedule, and budget as early estimates collected during the design phase were preliminary. As an integral part of the design process, efforts were made to produce more accurate estimates. To mitigate these risks, the project team will be obtaining steering committee approval for the final design, schedule, and budget through a comprehensive review of the sponsor/stakeholder approved design. This will allow the alignment of all project components, ensuring accurate planning and execution. It should also be noted that the Body-Worn Cameras project and the Charter Reform technical transition work may have an impact on its implementation schedule.

Upcoming milestones

- A complete risk assessment (completed)
- A final impact and criticality matrix documented (as part of the risk assessment, completed)
- Estimates to inform final design
- Finalization of Phase 1 deliverables
- Re-engage quality assurance at the beginning of Phase 2

Committee Rating

Overall **Yellow**

Schedule **Yellow**

Budget **Yellow**

Scope **Green**

Infor Project

Portland Water Bureau (PWB), Bureau of Environmental Services (BES)

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 Public Sector 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 July 2023 – January 2024

BES: The BES project started implementation in September of 2023. The official kick-off and core training were completed scheduled in January of 2024. Dedicated project managers have been assigned for the City and the Vendor. A baseline schedule has been developed. A program plan and risk management process is in place.

PWB: The PWB project started implementation in July of 2023. The PWB project team is collaborating with its vendor, Infor, to complete functional specifications and designs in preparation for software configuration and interface development.

Risks

BES: This project is continuing to lag behind the schedule, and both bureaus are dependent on the same vendor technical team. The project team is dependent on Bureau Service Agreements to represent the user community. Some turnover of key roles on this project have occurred. Transitions are being well managed, but turnover adds risk. BTS activities still need to be

incorporated into the project schedule. Charter Reform and staffing-related budget impacts across the City could impact project resources.

PWB: As noted above the implementation team is dependent on a single technical resource without having a solid back-up plan. In an effort to resource, the team is escalating schedule concerns with the vendor's management. The team is struggling to get traction. Transitions are being well managed but with some turnover of key roles on the project adds risk. BTS activities still need to be incorporated in the project schedule. As with the BES side, Charter Reform and staffing-related budget impacts across the City could affect project resources.

In-progress and upcoming milestones

BES:

- Communications and engagement plan
- Scheduling training and updating training plan
- Project kick-off
- Run and test
- Core team training
- Business process workshop

PWB:

- Prepare integration partner test environments
- Planning interfaces
- Test Strategy
- Additional technical trainings
- Test planning
- Reporting strategy
- Reporting functional specifications

Committee Rating

BES:

Overall *Green*

Schedule *Green*

Budget *Green*

Scope *Green*

PWB:

Overall *Yellow*

Schedule *Red*

Budget *Yellow*

Scope *Green*

SAP Ariba Project

Procurement

Project Description

BRFS Procurement Services uses a system called Buyspeed to manage competitive sourcing events like Request for Proposals, cooperative sourcing, amendments, etc. Over \$1B is managed through Buyspeed annually. The intent of this project is to run these sourcing events through a new system, SAP Ariba, in order to increase our overall capacity.

Major accomplishments October 2023 – January 2024

The base build is complete and the project team has finished testing. The Supplier Lifecycle and Performance (SLP) module is scheduled to go-live in March, and the other two modules, Contracts and Sourcing, will go-live in April. Systems Integration testing started for SLP occurred in the beginning of January.

Risks

Several risks have been identified related to the project schedule. Risks have been reviewed and the team is taking steps to mitigate. The project schedule was found to be too aggressive, and a change order was executed to extend the schedule several months. After the change order, the project schedule still has little slack.

A need for additional software to manage confidential sole proprietor information was identified after launch. A contract is not yet in place for the

new vendor. Integrating this software with less than eight weeks to go-live increases risk on an already tight schedule.

Delays and unexpected issues have arisen during testing. There is not one integrated schedule for all project activities, risking communication challenges across workstreams.

Organizational Change Management activities are starting late and are under-resourced.

The project was missing some deliverables, including an approved project charter, risk management plan, and fully defined roles and responsibilities. These documents are in the process of being finalized.

Organizational changes due to the City's Charter Reform could impact the project.

Upcoming milestones

- Planning and requirements for new software purchase and integration
- Complete training materials
- Complete contracts and sourcing

Committee Rating

Overall **Yellow**

Schedule **Yellow**

Budget **Yellow**

Scope **Green**

PART III – Technology Projects pending TOC Oversight

Body-Worn Cameras Project

Portland Police Bureau

Public Safety Roster Scheduling Replacement Project

Portland Police Bureau

Advanced Metering Infrastructure Project

Water Bureau

Impact Statement

Purpose of Proposed Legislation and Background Information

Because of altered reporting schedules, this report covers slightly different timelines for each individual project, which is noted in the report. 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

Not applicable.

Agenda Items

163 Time Certain in [February 21, 2024 Council Agenda](https://www.portland.gov/council/agenda/2024/2/21)
(<https://www.portland.gov/council/agenda/2024/2/21>)

Accepted

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

Commissioner Carmen Rubio Absent

Commissioner Dan Ryan Absent

Commissioner Rene Gonzalez Yea

Commissioner Mingus Mapps Yea

Mayor Ted Wheeler Yea