Technology Oversight Committee
Quarterly Report
(January – April 2013)

PART I – Technology Project Oversight in the City of Portland
January – April 2013

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 edits to BTS Administrative Rule 4.01 – Technology Project Intake and adopted 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 Hales	Wilfred Pinfold, PhD Director, Extreme Scale Programs at Intel
Commissioner Fish	Ken Neubauer Infrastructure Manager, Standard Insurance
Commissioner Fritz	Doretta Schrock Transportation Security Administration
Commissioner Novick	Joshua Mitchell Web and Enterprise Applications Manager, Multnomah County
Commissioner Saltzman	Colleen Gadbois Regional Manager, Providence Health & Services

Joshua Mitchell and Colleen Gadbois were appointed as TOC members in April of 2013.

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.

Major Accomplishment this Quarter:
- In February 2013, the TOC had a check-in meeting with the QA consultants to see whether the templates and the process are working and how they could be improved.

Upcoming Milestone next Quarter:
- Updates to the QA template will be finalized next quarter.

Project Management

Staff from OMF Business Operations and OMF Bureau of Technology Services provide committee support and technical expertise to the TOC.

Major Accomplishments this Quarter:
- The TOC implemented a triple constraint dashboard in April 2013 to create a visual representation of the project status with respect to timeline, budget, and scope. This will provide an opportunity for TOC members to collectively determine a status color for each project each month. These dashboards will be completed monthly as part of the TOC meeting notes and will be presented in these quarterly reports.

- The TOC agreed that all projects must present a final monthly bureau update after a project is complete to officially close the project. This would start the clock on the 90-day post implementation report.

- The TOC heard their first 90-day post implementation report from the Storage Area Network in March 2013. This report is designed to be completed 90 days after a project has concluded and is intended to capture best practices and lessons learned for future technology projects.

- One City project submitted project intake documents that were determined not to warrant TOC oversight:
  - Arts Tax Implementation, sponsored by OMF's Revenue Bureau.

Upcoming Milestones next Quarter:
- The TOC will be spending their May meeting talking about the City's technology contracting process in anticipation of writing recommendations to the Chief Administrative Officer on how the process could be improved.

PART II – Summary of Technology Projects under TOC Oversight
January – April 2013

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Project name: **Information Technology Advancement Project (ITAP)**
Bureau: Bureau of Development Services (BDS)

Project Description:
Develop paperless permit and case management and allow complete, online access to the permitting and case review services that development bureaus provide. Project deliverables include digitization of historical permit, case and property information; online access to historical permit, case and property information; implementation of an updated permit and case review information management system; online case and permit application and review services; mobile online access for field staff and implementation of an automated queuing system.

Status: The project is meeting expectations in its current phase, but the TOC continues to monitor the initial concerns of timeline and total cost.

Major Accomplishments this Quarter:
- Three contracts are in the final review stage by Procurement Services, City Attorney's Office, and Auditor's Office. Tentative agreements have been reached and contract approval scheduled to occur throughout April.
  - Sierra Systems: System Integration and Implementation Services
  - Infor: Hansen Software Licenses and Maintenance
  - Avolve: ProjectDox Software Licenses and Maintenance
- The ITAP business case document was revised to include a range of potential project efficiencies and includes savings realized by replacing current end-of-life software system. Estimated project cost of $11.3 million is projected to be paid off in five (5) to seven and a half (7.5) years after ITAP System go-live in FY 2015-16, depending on efficiencies realized.
- The project team continues to work on project readiness activities, including the GIS system that will interface with the new system and data cleanup and conversion.
- Project Manager is providing face to face updates with stakeholders and gathering feedback on the updated business case.

Upcoming Milestones next Quarter:
- Contract signed and project initiated – May 2013.
- Phase One: May – Fall 2013
  - Develop Formal Project Plan
  - Develop and Install Sandbox/Training Environment

Risks, Concerns, Comments from TOC:
- Since this is a large project still in its early stages, the TOC rated the timeline and budget yellow to stay vigilant and alert to potential unknown risks or conditions that may not have surfaced yet.
- Baseline Information will be completed on the below dashboard once the contracts have been approved.

Exhibit A

Exhibit A

Project Name: **BDS IT Advancement Project (ITAP)**
Bureau: **Bureau of Development Services**
Reporting Date: **4/15/2013**

	Initial Estimate at TOC Intake as of date: 3/7/2012	**Planned at Baseline** date: __/__/____	**Current Revision** (Based on Apparent Successful Vendors Best and Final Officer) date: <March 2013>	**QA Assessment** Red, Yellow, Green	**TOC Assessment** Red, Yellow, Green
Expected Completion	May 29, 2015		Summer 2015		
Confidence Level	**Low** Confidence level was not formally addressed or provided at time of submission - assessed retroactively		**Medium** Project schedule will be finalized during Project Phase 1 – Formal Project Plan		
Budget	**Approx. $8.2 mil** $2.75 mil in vendor services and software license costs plus $5.5 mil in City capital costs (Ordinance allowing BDS to start RFP process included $3 mil vendor service and license costs)		**Approx. $11.2 mil** $6 mil in vendor services and software license costs plus $5.2 mil in City capital costs (vendor costs does not include approx. $1 mil for 5-years of maintenance fees or $0.8 mil in vendor support post go-live)		
Confidence Level	**Low** Confidence level was not formally addressed or provided at time of submission - assessed retroactively		**High**		
Scope Stability Confidence Level	**High** Confidence level was not formally addressed or provided at time of submission - assessed retroactively		**High**		

Project name: **Monthly Billing Statements**
Bureau: Water Bureau; Revenue Bureau

Original Project Description:
The Portland City Council directed the Portland Water Bureau to modify its billing system and processes so the majority of its water and waste water customers receive monthly statements. Currently, Water performs quarterly meter reads and bills quarterly. The quarterly bill will be divided into three monthly billing statements under the new program. Meter reads will still be done quarterly. Quarterly payments will no longer be an option.

Project Redefined:
The monthly payment will now be optional instead of mandatory, but in order to be able to pay monthly, the customer must sign up for electronic billing.

Status: TOC has concerns with the vendor delays and increase in costs.

Major Accomplishments this Quarter:
- City project staff met with Cayenta leadership in early March to discuss the Monthly Statements project, specifically:
    - Poor quality of programming delivered by Cayenta.
    - Scheduling and prioritization of defects reported.
- Project staff decided to move forward with a work order structured on Cayenta's revised timeline and assurances. Work order contains specific language that if deliverables are not met, payments will not be made, and the City will cancel the order.
- The implementation date has been revised from January to April, to now the current deadline for Cayenta is end of May 2013, with go-live scheduled for October 2013.
- All functional tests have been run.
    - 85% were completed without error.
    - 16 defects are with Cayenta.
- Deferred e-billing portion of the project so Cayenta staff could focus on the delays to the monthly statements.

Upcoming Milestones next Quarter:
- Cayenta's deadline for fixing current defects is May 31, 2013.

Risks, Concerns, Comments from TOC:
- Timeline: Given the history with Cayenta, the TOC is not confident Cayenta will meet the May 30 deadline. The revised go-live of this project continues to be pushed back from the original date of July 2012 to now October 2013.
- Budget: Cayenta's recent negotiation for the May 2013 implementation date included a work order for almost $40,000 to complete necessary changes. The TOC is confident that $270,000 reflected in the below dashboard will be the final project cost, but there is concerned that more money keeps going into this project with unknown quality of what that money will buy.
- Scope: There are no significant concerns on the overall project scope.

Exhibit A

Project Name: **Monthly Water/Sewer Statements**
Bureau: **Water Bureau and Revenue Bureau**
Reporting Date: **4/15/2013**

	Initial Estimate at TOC Intake as of date: 12/2/2011	Planned at Baseline date: 6/29/12	Current Revision date: 4/15/2013	QA Assessment Red, Yellow, Green	TOC Assessment Red, Yellow, Green
Expected Completion	June 1, 2012	January, 2013	October, 2013		
Confidence Level	Very Low	Low	Medium/Low		
Budget	$100,000	$160,000	$270,000		
Confidence Level	Low	Low	High		
Scope Stability Confidence Level	Very Low	High	High		

Notes:

- TOC discussed adding a re-set column in between the baseline and current revision to show the change in the project scope in summer, 2012.

Exhibit A

Project name: **Affordable Housing Software**
Bureau: Portland Housing Bureau (PHB)

Project Description:
PHB contracted with Housing Development Software (HDS), Inc. to implement a solution that will provide a single data repository for the City's affordable housing programs. This effort will replace disparate systems with a modern and effective single core system, allow for data-entry efficiencies, reduce overall costs and also improve access to data and reporting tools.

Status: TOC has concerns with the lingering delays on this project.

Major Accomplishments this Quarter:
- Project completion has been delayed due to glitches in the loan amortization schedules.
- Funds Management, Single-Family, and Multi Family & Asset Management modules are all fully implemented.
- Loan portfolio of 1,743 loans has been entered into the HDS Loan servicing module.
- HDS released Version 12.0 in early April. PHB is reviewing the release in its test environment to determine the extent of fixes made to the loan servicing amortization schedules, which have caused the delay.
- Additional fixes to loan servicing amortization schedules are scheduled to be released in a subsequent patch. PHB is waiting on HDS to produce a timeline and schedule of when these patches will take place.
- Project is currently $83,000 under budget. Project is not incurring any additional costs to the vendor, but staff time has been spent testing these patches.

Upcoming Milestones next Quarter:
- Loan Servicing module is currently hoping for a May/June completion.

Risks, Concerns, Comments from TOC:
- Timeline: go-live of the Loan Servicing module was originally scheduled for October, then changed to January, and is now hoping for a May/June completion.
- TOC is following up with PHB project staff to learn about the process with the vendor and what can be done to prevent this on other TOC projects.

Project name: **Enterprise Network Technology Refresh**
Bureau: Bureau of Technology Services (BTS)

Project Description:
BTS maintains the City's enterprise data network that supports data and voice communications between servers, applications, computers, and the Internet. This network is critical to the daily functioning of most City services, including public safety. The current network was designed and implemented in 2005, and both hardware and software need to periodically be replaced to maintain vendor support and meet performance and reliability standards. This project will replace all of the current network equipment over a five year period.

Status: Project is currently meeting expectations.

Major Accomplishments this Quarter:
- All server farms, with the exception of CGIS, have been migrated to the new Nexus core.
- HNAS and MVWare hosts migrations to the new network are all complete.
- High speed WAN (IRNE, INET) migration to new network is complete.
- TPB IBM P-Series networks are up and testing is in progress. SAP networks are being configured and interconnected so that SAP server migration can start.
- All purchases for this fiscal year are completed and invoices paid; all are within budget.

Upcoming Milestones next Quarter:
- Install and configure Nexus network services layer, including new firewalls, load balancers, and DMZ.
- Migrate Internet connectivity to new network.

Risks, Concerns, Comments from TOC:
- Overall, the project is on schedule and under budget.
- There have been some shifts in the interim deliverables schedule since the last quarter, but this has not impacted the overall schedule. These shifts were due to staff balancing other projects and creating a more detailed timeline.
- The TOC views the majority of this project as routine migration with the most risk in the early phase, such as building the core and the City's server migrations. TOC agreed to provide oversight for the first three milestones, which have an estimate completion date of July 2013. TOC suggested QA provide quarterly reports rather than monthly to use funds most effectively.

	Initial Estimate at TOC Intake as of date: 6/01/2012	Planned at Baseline date: 09/01/2012	Current Revision *(if applicable)* date: 04/15/2013
Expected Completion	07/01/2013	07/13/2013	07/13/2013
Confidence Level	High (80%)	Very High (95%)	Very high (95%)
Budget	$500,000.00	$500,000.00	$451,000.00
Confidence Level	High (80%)	High (85%)	Very High (95%)
Scope Stability Confidence Level	High (75%)	Very High (85%)	Very High (90%)

Other Project Briefings:

There were several projects that came before the TOC this quarter that don't necessitate ongoing monthly review in the TOC portfolio at this time.

Arts Tax Implementation

In November 2012, voters approved the Arts Education and Access Income Tax (Arts Tax), which is a flat tax of $35 for most Portland taxpayers. The Revenue Bureau presented a brief overview of the project approach and outreach plan. The project is on an aggressive timeline to create the web application and database system that would process tax payments. Because the new system is on track to become fully functional by the end of February 2013, the Revenue Bureau wanted the TOC to be aware of the project, but realizes there is not enough time for robust feedback from the TOC.

Public Safety Systems Revitalization Program (PSSRP)

The PSSRP is a multi-year, coordinated effort among regional partners to replace or upgrade aging public safety technology systems. The key driving factors for the program are: 1) inability to receive ongoing maintenance from current public safety systems vendors, 2) retirement of key system support staff; and 3) difficulty of maintaining interoperability with existing systems. The three primary projects are the public safety radio replacement project, the Regional Justice Information Network (RegJIN), and the fire information systems project. The PSSRP already has several layers of project oversight, including external QA and quarterly reports to the Chief Administrative Officer, which is why this project is not part of the TOC. However, since this is a large, regional project, it's a project the TOC should be aware of.

Storage Area Network 90-Day Post Implementation Report
Bureau: Bureau of Technology Services

Project Description:
In 2005, a Storage Area Network (SAN) was deployed to solve the City's data storage needs, addressing storage on multiple disk arrays, available space in one area couldn't be used in another, and multiple storage systems were expensive to maintain and grow. Since 2005, data storage needs for bureaus have continued to climb. Creating additional data storage capacity is the primary goal of this SAN project.

Status: Project was completed in November 2012 without any significant problems. This is the first project to be reviewed using the 90-day post implementation report template.

90-Day Post Implementation Report – March 2013

Project Timeline: Project was completed four months later than originally planned, but these were largely circumstances that couldn't be controlled – the project team couldn't work on the public safety system over the summer. This delay did not impact the budget.

Project Scope: All deliverables were completed, with the exception of a minor piece that was completed immediately after project completion.

Project Budget: Project finished $300,000 under budget.

Areas that could have gone better: Communication with the vendor project manager could have been improved. The City was too obliging, but the project manager was eventually replaced.

The vendor could have forewarned the City about a needed technology upgrade up front, which could have prevented a few delays.

Overall: City staff are pleased with the end product. It's a faster, more flexible system. The City invested in training for current staff to maintain the new system, which was a good value.