

# Technology Oversight Committee Quarterly Report (January – March 2015)

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## **PART I – Technology Project Oversight in the City of Portland** January – March 2015

### **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:

<u>Appointed by</u>	<u>Member</u>
Mayor Hales	Wilfred Pinfeld, PhD Director, Extreme Scale Programs at Intel
Commissioner Fish	Ken Neubauer Infrastructure Manager, Standard Insurance
Commissioner Fritz	Dyanna Garcia
Commissioner Novick	Joshua Mitchell Chief Technology Officer, Drupal Association
Commissioner Saltzman	Colleen Gadbois

### **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 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.

### **New Projects under TOC Oversight**

- TOC added PCI/Payment Gateway during this quarter.

### **Projects no longer under TOC Oversight**

- The Affordable Housing Software project (Portland Housing Bureau) is complete.

## **PART II – Summary of Technology Projects under TOC Oversight**

January – March 2015

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

**Project Description:**

This project develops a paperless permit and case management process and allows complete, online access to the permitting and case review services. Project deliverables include digitization and online access of historical permits 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 TOC continues to have concerns around project schedule and volume of remaining work.

**Major Accomplishments this Quarter:**

- Project manager continues to deliver monthly Deficiency Reports to Sierra-Cedar.
- Most of the previous issues have been resolved; development halt has been lifted.
- Sierra's project manager resigned; Sierra's transition plan seems to be working well.

**Upcoming Milestones next Quarter:**

- Geographic Information Systems (GIS)
- Data cleanup and conversion

**Risks, Concerns, Comments from TOC:**

- The TOC continues to be concerned about project schedule and volume of remaining work.

**Project Name:** BDS IT Advancement Project (ITAP)  
**Bureau:** Bureau of Development Services  
**Reporting Date:** 3/17/2015

	<b>Initial Estimate at TOC Intake</b> date: 3/7/2012 This was a speculative amount only.	<b>Planned at Baseline*</b> date: 7/1/2013	<b>Current Revision</b> <i>(Based on Phase One Planning and Analysis as of date: 8/1/14)</i>	<b>QA Assessment</b>			<b>TOC Assessment</b>		
<b>Expected Completion</b>	May 29, 2015	December 2015	Winter 2015-16	Jan	Feb	Mar	Jan	Feb	Mar
Confidence Level	<b>Low</b>	<b>Medium</b>	<b>Medium</b>	Red	Red	Red	Red	Red	Red
<b>Budget</b>	<b>Approx. \$8.2 mil</b> \$2.75 mil in vendor services and software license costs <u>plus</u> \$5.5 mil in City capital costs (Ordinance allowing BDS to start RFP process included \$3 mil vendor service and license costs)	<b>Approx. \$11.8 mil</b> \$6 mil in vendor services and software license costs <u>plus</u> \$5.8 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)	<b>Approx. \$11.8 mil</b> Change in schedule may cause increase in City capital costs	Yellow	Yellow	Yellow	Red	Red	Red
Confidence Level	<b>Low</b>	<b>High</b>	<b>Medium</b>						
<b>Scope Stability</b> Confidence Level	<b>High</b>	<b>High</b>	<b>High</b>	Yellow	Yellow	Yellow	Red	Red	Red

\*NOTE: Budget baselined on 7/1/2013 at \$11.5 M

**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 replaces disparate systems with a modern and effective single core system, providing data-entry efficiencies, reducing overall costs, and improving access to data and reporting tools.

**Status:**                 The test window concluded with no major issues; vendor provided a patch that resolved all minor issues. Project is complete.

**Major Accomplishments this Quarter:**

- All required functionality is running in production; PHB will run Mitas in parallel through June.
- Project is complete.
- QA notes that, although the project lacked a dedicated project manager, the bureau leadership did a good job managing risks with the solution.

**Upcoming Milestones next Quarter:**

- None – project complete.

**Risks, Concerns, Comments from TOC:**

- None – project complete.

Exhibit A

**Project Name: HDS Affordable Housing Software Implementation**

**Bureau: Portland Housing Bureau**

**Reporting Date: 2/17/2015**

	<b>Initial Estimate at TOC Intake</b> as of date: 11/1/2011	<b>Planned at Baseline</b> date: 1/15/2012	<b>Current Revision</b> <i>(if applicable)</i> date: 12/9/2014	<b>QA Assessment</b> Red, Yellow, Green	<b>TOC Assessment</b> Red, Yellow, Green
<b>Expected Completion</b>	6/30/2012	9/30/2012	02/28/2015	<b>Green</b>	<b>Green</b>
Confidence Level	High	Medium	High		
<b>Budget</b>	\$836,484	\$836,484	\$836,484	<b>Green</b>	<b>Green</b>
Confidence Level	High	High	High		
<b>Scope Stability</b>	High	High	High	<b>Green</b>	<b>Green</b>
Confidence Level					

**Project name:** Procurement Solicitation System  
**Bureau:** Bureau of Internal Business Services.

**Project Description:**

Procurement Services is outgrowing their current solicitation system, which doesn't offer a cost-effective solution or the functionality required by the City. Procurement is planning to replace and integrate three systems into one and add functionality that will allow electronic RFP submissions.

**Status:** Project is currently meeting expectations.

**Major Accomplishments this Quarter:**

- Developed project schedule.
- Test environment installed.
- Performing initial configuration to out-of-the-box functionality.
- Beginning interface design.

**Upcoming Milestones next Quarter:**

- Complete development of system interfaces.
- Install and configure production environment.
- Data migration and testing.
- Manage change and train staff.
- User acceptance testing.

**Risks, Concerns, Comments from TOC:**

- Project is currently meeting expectations.

**Project Name:** Procurement Software System  
**Bureau:** Bureau of Internal Business Services  
**Reporting Date:** 3/17/2015

	<b>Initial Estimate at TOC Intake</b> as of date: 05/09/13	<b>Planned at Baseline</b> date: 6/17/13	<b>Current Revision</b> <i>(if applicable)</i> date: 09/16/2014	<b>QA Assessment</b> Red, Yellow, Green			<b>TOC Assessment</b> Red, Yellow, Green		
<b>Expected Completion</b>	May 2014	May 2014	May 2015	Jan	Feb	Mar	Jan	Feb	Mar
Confidence Level	Medium	Medium	Medium	Green	Green	Green	Green	Green	Green
<b>Budget</b>	\$200,000 - \$250,000	\$200,000 - \$250,000	\$522,000 - 561,000	Green	Green	Green	Green	Green	Green
Confidence Level	Low	Low	Low						
<b>Scope Stability</b> Confidence Level	Medium	Medium	Medium	Green	Green	Green	Green	Green	Green



**Project name:** Lien Accounting System Rewrite  
**Bureau:** Auditor's Office

**Project Description:**

The Lien Accounting System is used to record and manage assessments and liens for the City, as required by City Charter and Oregon State law. The application is written in an old programming language and is one of two remaining applications on the mainframe server, which is scheduled to be decommissioned by July 1, 2015. Because of the tight timeline and resource constraints, the decision was made to rewrite the existing system using a more modern programming language and transfer it to a Windows environment.

**Status:** Project is currently meeting expectations.

**Major Accomplishments this Quarter:**

- Completed User Acceptance Testing (UAT) for Accounts and Billing modules.
- Completed development work for Recording and Projects modules.
- Revenue Division has begun UAT for Receivables and Reports modules.
- Project Acceptance Plan finalized and approved.

**Upcoming Milestones next Quarter:**

- Resolve any issues found in UAT and regression testing.
- Continue development work on Bond Processing and Reports modules.
- Work on project plans for Deployment, Maintenance and Operations, and Training.

**Risks, Concerns, Comments from TOC:**

- Lack of solid schedule is still a concern.
- Project is currently meeting expectations.

**Project Name:** Lien Accounting System  
**Bureau:** Auditor's Office  
**Reporting Date:** 3/17/2015

	<b>Initial Estimate at TOC Intake</b> As of : 6/9/14	<b>Planned at Baseline</b> As of : 6/9/14	<b>Current Revision</b> As of: 3/17/2015	<b>QA Assessment</b>			<b>TOC Assessment</b>		
<b>Expected Completion</b>	6/19/2015	6/19/2015	No revision	Jan	Feb	Mar	Jan	Feb	Mar
Confidence Level	Medium	Medium	Medium	Yellow	Red	Red	Red	Red	Red
<b>Budget</b>	\$483,920	\$483,920	\$668,620 (revised Jan 2015)	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Confidence Level	Medium	Medium	Low						
<b>Scope Stability</b> Confidence Level	Medium	Medium	High	Green	Green	Green	Green	Green	Green

**Project name:** PCI/Payment Gateway  
**Bureau:** Bureau of Technology Services / Public Finance & Treasury

**Project Description:**

The City is required to meet Payment Card Industry – Data Security Standards (PCI-DSS) as part of a merchant services contract as required by card networks (Visa, MasterCard, American Express, Discover and JCB International). The City does not currently meet PCI-DSS 3.0 standards and is required to remediate the card processing environment, or adopt other means of processing card payments, to ensure the City is compliant by December 31, 2015.

**Status:** Too new to rate

**Major Accomplishments this Quarter:**

- PCI stakeholders are reviewing options available to meet PCI compliance.
- Payment Gateway assessment completed.
- Contract being negotiated.

**Upcoming Milestones next Quarter:**

- Choose project QA.
- Complete contract negotiations.
- Create test environment.
- Develop application integration.

**Risks, Concerns, Comments from TOC:**

- Timeline is extremely short.
- TOC will dashboard once QA is in place.