

(d) 2 – City Portfolio-Products-Projects Management Report

Smart Cities and Service Improvements Committee

February 4, 2021

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Smart Cities and Service Improvements Committee

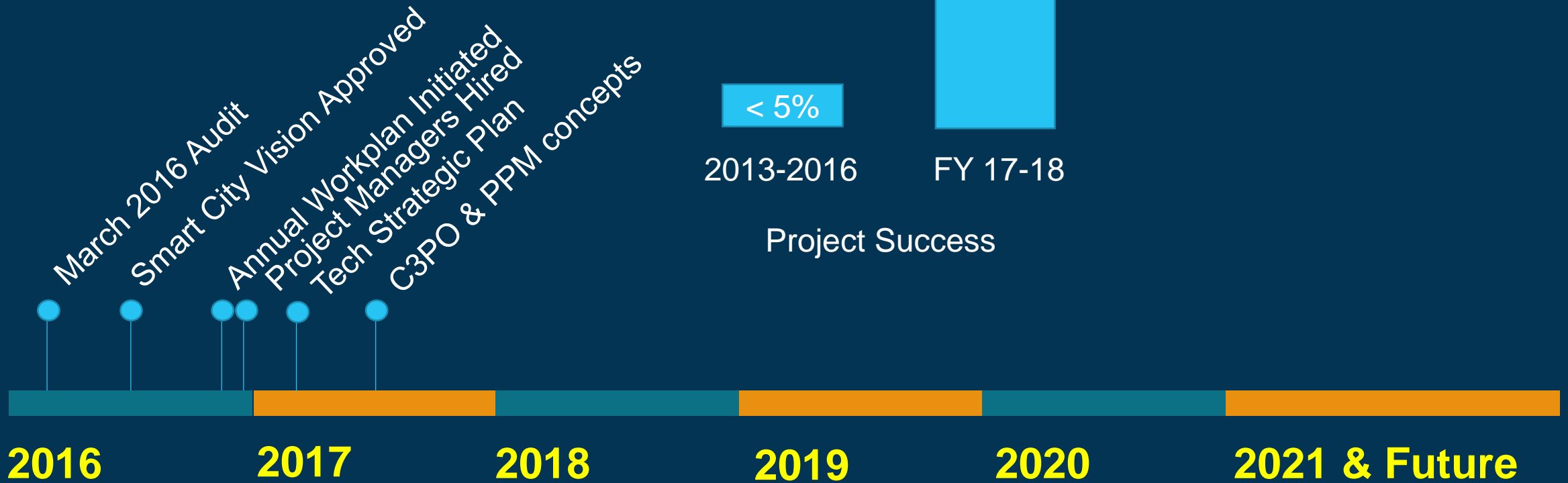
Report on the City's investments in improving product
management and project execution in the City organization

February 4, 2021

First, some history...

How did we get here?

The Early Days: Improved Process & Vision



Project Acceleration: Ship IT!

My San Jose (SJ311)

AMANDA7 Upgrade

Website Recovery Project

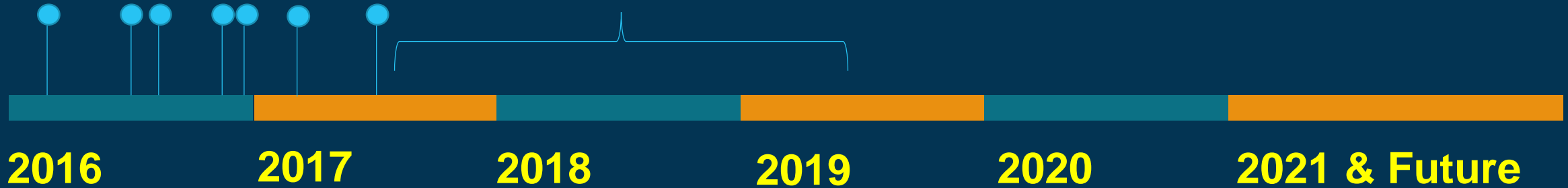
Business Tax Amnesty

FMS Upgrade

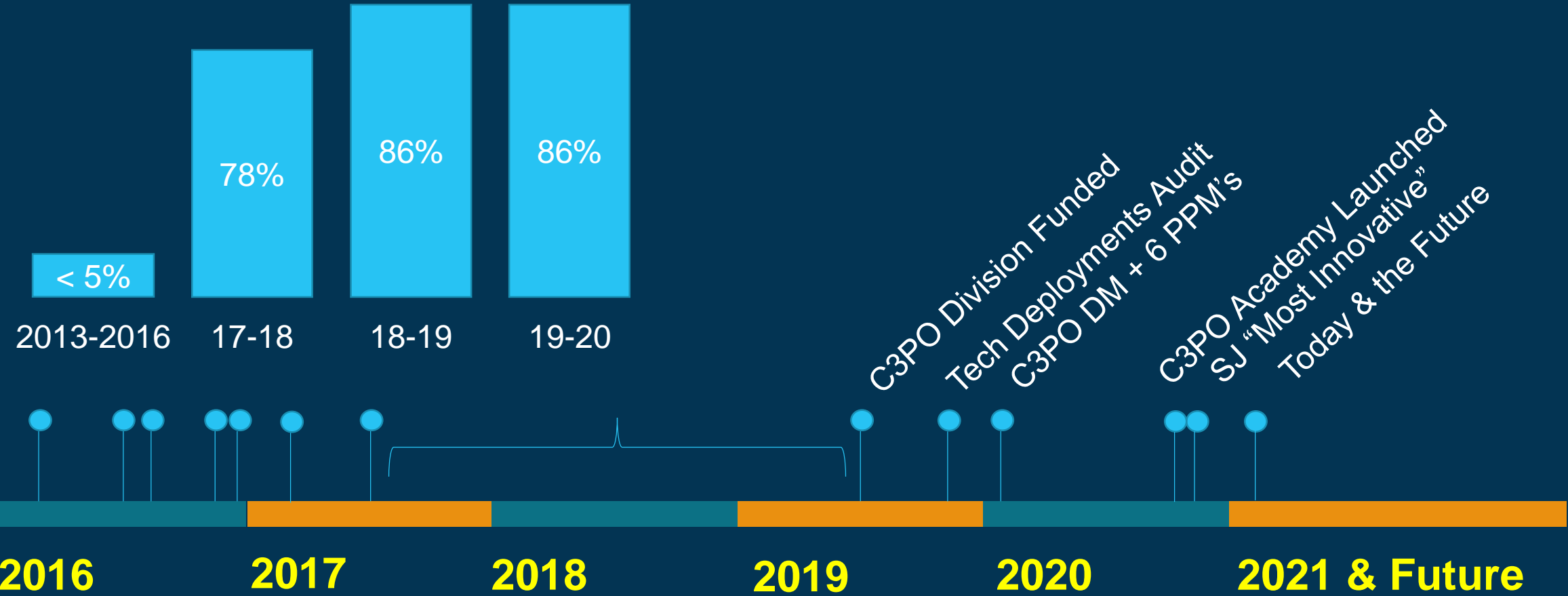
Revenue Upgrade

Workers Comp Upgrade

Treasury Management System



Continuous Improvement:



City Portfolio-Products-Projects Office (C3PO)

Portfolio



Key technology goals for the City

Products



An ongoing solution

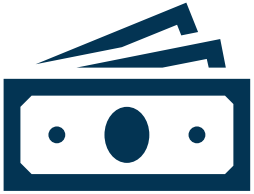
Projects



A time-boxed IT implementation

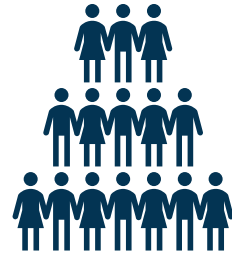
Standards, Policy and Training

C3PO in the Mix



Greater
Than
\$500,000

OR



Involves
More Than
1 Dept.

OR



Greater
than 1 Year
in Execution

OR



High Profile
or Sensitive
to the City

+ support and train others on their initiatives throughout the City

Product vs Project Management

Product Management
focuses on:

What?

Why?

Project Management
focuses on:

Who?

How?

When?

Most IT projects
actually cross over
both of these,
hence our C3PO
team members are
*Product-Project
Managers (PPM's)*





Technology Deployments Audit

- Released November 2019
- “How can we improve our deployment success?”
- 10 recommendations for change

Tech Deployments Audit (Nov 2019) Findings

#	Audit Finding	Solution	Status
1	Updated Technology Policy and Guidelines	The (New) Technology Management and Deployments Policy and Guidelines	Nearly Implemented
2	Chartering: All relevant levels of product users and stakeholders	Updated Policy & Charter Template	Nearly Implemented
3	Chartering: Identify Waterfall or Agile approach pre-procurement	Updated Policy & Charter Template	Nearly Implemented
4	Chartering: Clear governance structures & appropriate staffing	Updated Policy & Charter Template	Nearly Implemented
5	Chartering: Formalize ITD's role, identify ITD liaison, Procurement Planning Board prioritization	Updated Policy & Charter Template	Nearly Implemented
6	Chartering: C3PO engagement, consultant performance & progress	Updated Policy & Charter Template	Nearly Implemented

Tech Deployments Audit (Nov 2019) Continued

#	Audit Finding	Solution	Status	
7	Limit loss of knowledge; key documents on a shared platform	C3PO SharePoint archives; C3PO Center of Excellence	Active Initiative	
8	Key vendor staff – ensure continuity with turnover; approval of key vendor staff	In vendor contract template + listing of staff	Implemented	
9	Reporting to Council Committee: regular, report delta's, public dashboard	Every other month reporting status to Smart Cities Committee	Active Initiative	
10	Comprehensive and up-to-date inventory; full lifecycle	Inventory of all IT assets, including software and subscriptions	Active Initiative	

New Technology Management & Deployments Policy – What does it do?

- Modernizes citywide IT governance
- Citywide standards for IT planning, reporting, asset management, cybersecurity, and deployment practices
- Resolves recommendations in 2019 Technology Deployments Audit
- Maximizes City's return on technology investments

Why Charters?

- Consensus on **People, Process** and **Technology**
- “In a nutshell, a charter is **clarity** and **commitment**”
- A **Charter** is a detailed document that enables execution when agreement is achieved at the *Commitment Sign-off* - Clarity & Commitment
- There is also an *Acceptance Sign-off* where the same people who agreed to the Charter accept the results of the project

Thank You

“Sometimes the role is to build a product, but the job is to build a culture.”

-- Mikal Lewis, Product Management Guru