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| Project Name  **Lobbyist Registry System: Disclosure** | Project Acronym or No.  **LDS** | |
| Project Sponsor  Linda Gehrke | LDS Target Project Completion Date | |
| Project Manager  Monika Matel-Sousa | Version No.  1.0 | Version Date  2015/12/21 |
| Business Analyst  Ibiwumi Ogungbade |
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| **LRS Project Overview** |
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| The Office of the Lobbyist Registrar (OLR) promotes and enhances the integrity of the City's decision-making through public disclosure of lobbying activities and regulation of lobbyists conduct. This aids the City of Toronto to comply with the City of Toronto, Act, 2006 s165 and Chapter 140 of the Toronto Municipal Code ("the Lobbying By-Law"), which requires the City of Toronto to maintain a lobbyist registry that is available to the public.  The Office of the Lobbyist Registrar maintains the Registry, enforces the Lobbying By-Law, conducts investigation, and ensures transparency by allowing the public to see who communicated with public office holders about governmental decisions using the Lobbyist Registry System.  The Lobbyist Registry System was initially released in 2008 and has three major purposes:  (1) Lobbyist uses the system to document their interactions with City Officials;  (2) The information is available publicly through the OLR's website and is searchable; and  (3) The information is contained in an internal operating system (IOS) which is reviewed and managed by OLR staff.  The current Lobbyist Registry System (LRS) was developed using a technology that will become obsolete and was designed only for desktop personal computer-based interaction with lobbyists. The public search capacity on the disclosure website is limited and lacks critical features demanded by the public. The Registry, as well, has significant performance issues with the current volume of information being collected higher than the original volume anticipated by I &T.  The Office of the Lobbyist Registrar has identified the need to update the technology of the Registry system and the search capacity to ensure that the public can access the information. More so, to reflect the current technology prevalence of mobile device usage replacing office computers, a mobile interface would be delivered as part of this project. |

| **Document Information** |
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| |  | | --- | | File Name: WCM Functional Requirements | | Author: Ibiwumi Ogungbade | | Last Saved Date: 12/21/2015 | | Last Saved By: Ibiwumi Ogungbade | |

| **Revision History** |
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| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | Revision | Date | Status | Author | Reviewed By | Summary of Changes | | 0.1 | December 10, 2015 | Draft | Ibiwumi Ogungbade | Monika Matel-Sousa | Project specific details added | | 0.2 | December 21, 2015 | Update | Ibiwumi Ogungbade |  | Updated;   * Other Project Activities * Timelines * Development Team | | 1.0 |  | Final |  |  |  | |

| **Document Distribution List** |
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| |  |  | | --- | --- | | Name of receiver / group | Position/Title | | Monika Matel-Sousa | Project Manager | |  |  | |  |  | |  |  | |  |  | |  |  | |

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# Introduction

The lobbyist disclosure system (LDS) is one of the three lobbyist registry system used by Office of the Lobbyist Registrar (OLR) to promote and enhance the transparency and integrity of City government decision making through public disclosure of lobbying activities. To improve the functionality and performance of the disclosure system, it was determined that modernizing and increasing efficiency of the Lobbyist Registry Search requires a good state of repair.

This solution will easily and clearly allow the public to see who is communicating with public office holders[[1]](#footnote-1) about governmental decisions. The online, searchable tool will allow Citizens of Toronto to exercise their right as a citizen and be aware of who is lobbying and what subject they are lobbying on.

Currently, there is a functioning lobbyist disclosure system that displays lobbying activities to its entirety. An updated search capacity will ensure that the public can access the information in the registry. A mobile interface will ensure that the transparency and accuracy of the registry is maintained and prevent delays in registration and reporting.

# Objective

The objective of the modernization of the lobbyist disclosure system is to bring the solution up to City and industry technology standards, meet the WCAG 2.0 AA accessibility standard by 2021 and reflect the current technology prevalence of mobile device usage.

# Scope

The overall scope includes the development of the following functions:

1. LDS List Filter View : (WCM01)

The Web Content Management system (WCM) data feed interface render function should include a high-level list of lobbyist information that provide data obtained from the Internal Operating System (IOS). In addition, pre-determined filters that allow lobbyist information to be searched based on various criteria such as Status, Lobbyist Type, Keyword, Lobbyist Name, Business/Organization Name, Client's Name, Subject Matter, Date, and Public Office Holders being lobbied.

1. Combined List Filter: (WCM02)

Members of the public should be able to perform a combined search using criteria listed above.

1. Search Result View (WCM03)

The search results should be displayed in a tabular format. The following information about a lobbyist should be displayed; Lobbyist Name, Lobbyist Type, Company/Organization, Client Name, Initial Filing Date, Status, and Registration Number.

1. Select Result View (WCM04)

The select search result view should display lobbyist information and subject matter information.

Lobbyist Information

* Lobbyist Class/Type
* Lobbyist Registration Number- Hyperlink to view entire form
* Lobbyist Registration Status
* Most Recent Lobbyist Registration Approval Date
* Lobbyist First and Last Name
* Lobbyist Position
* Lobbyist Organization and Business

If In-House Lobbyist- Display In-house lobbyist lobbying on behalf of the company.

Subject Matter

* Subject Matter Registration Number- Hyperlink to view entire form
* Subject Matter
* Status
* Initial Registration Approval Date
* Persons Lobbied
* Date
* Activities- communication- view button

1. Communication/Lobbying Activity View (WCM05)

Communication should be displayed in a tabular format. The following information are to be displayed; Date, method, meeting requested, meeting arranged, person(s) lobbied, lobbyist Name

1. Pre-defined Queries Search View (WCM06)

Search should include pre-defined queries[[2]](#footnote-2) to help members of the public have ready reference of records of lobbying activities.

1. Mobile View (WCM07)

The lobbyist disclosure system should have a fluid interface for varying device sizes to comply with current City and industry technology standards.

# Other Project Activites

1. WCM Project team will complete the following:

* Data feed schema
* Web Pages Mock Up
* Defect fixes related to the rendering of the data feed
* Accessibility consultation (Intranet)
* Design alignment LDS and LRS
* Documentation for Application System Specifications (Data schema description and high-level solution design document to be given to Clerks IT at Deployment)
* Performance Testing
* Open Data
* Lobbyist Registration System (LRS)- TBD

b) LDS Project Team will complete the following:

* Lobbyist Registry System demonstration
* Database Extraction
* Functional Testing/ Performance Testing
* User Acceptance Testing and Performance/Stress Testing on entire Lobbyist Registry System
* Creation of the data extract from the Lobbyist Registry system based on data schema
* Logistics management and process implementation ensuring the data feed is available for consumption by the WCM system
* Data feed monitoring and problem alert escalation procedures/implementation (as needed)
* Backup and recovery plan implementation as needed
* Provision and approval for all content to be integrated within the public facing website
* Implementation and communication plan for the integration of the new interface with the existing website and removal and archiving of existing content and the resources to implement the plan
* Creation and implementation of a sustainment plan for the new interface

# Timelines

| **High-Level Milestones** | **Responsible Person(s)** | **Target Completion Dates** |
| --- | --- | --- |
| Planning Meeting | Web Content Management Group  Lobbyist Register Project Team | December 14, 2015 |
| System Review | Ibiwumi Ogungbade  Lobbyist Registry Project- Business Analyst  Rob Williams  Uni Oh  Web Content Management Group | January 6th 2016 |
| Draft Mock-up | Rob Williams  Web Content Management Group | January 15th 2016 |
| Database Extraction | George Ngan  Lobbyist Registry Project- Developer | January 15th 2016 |
| Design Sessions | Rob Williams,  Web Content Management Group  Ibiwumi Ogungbade,  Lobbyist Register Project – Business Analyst |  |
| Sponsor – Client Review and Approval | Monika Matel-Sousa & Ibiwumi Ogungbade  Lobbyist Register Project Team |  |
| Development Iterations | Rob Williams,  Web Content Management Group |  |
| Unit Testing | Rob Williams,  Web Content Management Group |  |
| Functional Testing  Defect Fixing | Leonid Gofeld,  Lobbyist Register Project Team –  Quality Assurance Lead  Rob Williams,  Web Content Management Group |  |
| User Acceptance Testing  Defect Fixing | Leonid Gofeld,  Lobbyist Register Project Team –  Quality Assurance Lead  Rob Williams,  Web Content Management Group |  |
| Performance Testing- TBC | Leonid Gofeld,  Lobbyist Register Project Team –  Quality Assurance Lead |  |
| Deployment | Rob Williams,  Web Content Management Group |  |

# Development Team

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| --- | --- | --- |
| ***Role*** | ***Dept./Division*** | ***Name*** |
| Lobbyist Registrar | Office of the Lobbyist Registrar | Linda Gehrke |
| Project Manager | City Clerks IT | Monika Matel-Sousa |
| Senior Project Analyst | City Clerks IT | TBC |
| Business Analyst | City Clerks IT | Ibiwumi Ogungbade |
| Application Tester | City Clerks IT | Leonid Gofeld |
| WCM Project Lead - Acting Digital Media Manager | Web Content Management |  |
| WCM Lead Developer | Web Content Management | Rob Williams  Uni Oh |
| WCM Accessibility Consultant | Web Content Management | TBD |

# Funding Source

Web Content Management unit to provide staff resources to complete requirements outlined in this document for the Lobbyist Registrar Application, more specifically the Lobbyist Disclosure System. Funds are sourced from Clerks Capital Budget (CG0??-??) for the maximum amount of ???.

The first payment of ??? will be provided upon development completion in ??? 2016. The final payment of $/// will be provided after deployment of application in ??? 2016. Payment will be made upon agreement of the project hours worked.

# Acceptance and Sign off

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| **Prepared By:** | Ibiwumi Ogungbade, Business Analyst | | |
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| **Approved By:** | Monika Matel-Sousa  Lobbyist Registrar Application Project Manager |  |  |
| *Name & Title* | *Signature* | *Date* |
| TBC  Acting Digital Media Manger |  |  |
| *Name & Title* | *Signature* | *Date* |
| Phillip Scott  Project Manager I&T |  |  |
| *Name & Title* | *Signature* | *Date* |

1. Public Office Holder- City employee [↑](#footnote-ref-1)
2. Pre-defined Queries- A pre-defined query is a query with specific criteria already defined. [↑](#footnote-ref-2)