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| Project Name  **Lobbyist Registry System: Lobbyist Registration** | Project Acronym or No.  **LRS** | |
| Project Sponsor  Linda Gehrke | LRS Target Project Completion Date | |
| Project Manager  Monika Matel-Sousa | Version No.  1.0 | Version Date  2016/01/07 |
| 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: 01/07/2016 | | Last Saved By: Ibiwumi Ogungbade | |

| **Revision History** |
| --- |
| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | Revision | Date | Status | Author | Reviewed By | Summary of Changes | | 0.1 | January 07, 2016 | Draft | Ibiwumi Ogungbade | Monika Matel-Sousa |  | | 0.2 | January 12, 2016 | Final | Ibiwumi Ogungbade |  | Update on Scope, Timeline and Development team | | 1.0 |  |  |  |  |  | |

| **Document Distribution List** |
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# Introduction

The lobbyist registration system (LRS) 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 registration of lobbying activities. To improve the functionality and performance of the registration system, it was determined that modernizing and increasing efficiency of the Lobbyist Registration System requires a good state of repair.

This solution will easily and clearly allow lobbyists to register their lobbying activities and document their interactions with City officials. The online tool will provide a secure environment for registering lobbying activities online which may potentially help public office holders make informed decisions while being transparent to the public in accordance with By-law.

Currently, there is a functioning lobbyist registration system used by lobbyists to document lobbying activities. A redesign of the lobbyist registration will increase the efficiency and effectiveness of registering for lobbying activities and processing of lobbyist registration. 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 registration 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. Lobbyist Registration: (WCM01)

Ability to:

* register as a new lobbyist
* log in to an existing registration
* choose from one of the following class of lobbyist " Voluntary, In-house or Consultant" when registering as new user (Different class of lobbyist have different lobbying form)
* review and edit lobbyist registration information
* view existing lobbyist registration i.e. active and inactive
* update existing lobbyist registration
* keep active/cancel lobbyist registration
* cancel lobbyist registration version
* close lobbyist registration
* lock historic lobbyist registration information
* display registration number & version, registration request, status, submit date and effective date for previous and current lobbyist registration
* enter security questions and create password to complete lobbyist registration
* generate registration number when registration is completed
* generate registration number for all In-house lobbyist added to registration
* generate User ID for lobbyist to login
* print and reprint certification form
* attach certification form and formal request letter to registration

1. Subject Matter Registration: (WCM02)

Ability to:

* register for one or more subject matter
* update subject matter registration
* view existing subject matter registration
* close subject matter registration
* cancel subject matter registration
* review and edit subject matter registration information
* keep active/ cancel lobbyist registration
* generate subject matter registration number for all subject matter registered
* display all subject matter registered by lobbyist
* display subject matter registration number & version, registration request, status, submit date and effective date

1. Messages/ Notification (WCM03)

Ability to:

* receive message notification from the Internal Operations System
* view message received
* reply to message received
* delete messages received once replied to
* attach document to message
* print messages
* receive notification for Lobbyist Registration and Subject Matter Registration expiry alerts (Fiscal-year End, 3 Months without Active SM, 1- Year from last update, Proposed end-date, 6 months without updates (SM), Committee without Attendees)

1. Communication (WCM04)

Ability to:

* select from a list of subject matter registration (One or More SM). Drop down menu should only consist of subject matter already registered and approved.
* add one or more lobbyist name who communicated with the public office holder
* add one or more public office holder details/ Person(s) lobbied- Public office holder type, ward, office, division or agency, Name or position title. The first selection would predetermine the outcome of information displayed and to be selected in the next two fields i.e. ward, office, division or agency, Name or position title
  + If user selects Member of Councils, allow users to choose from a list of Wards and list of Member of Council
  + If user selects staff member of council, allow users to choose from a list of Wards and text field to enter Name
  + If user selects Member of Local Board, allow users to choose from list of local boards and text field to enter Name
  + If users select If user selects Staff of Member of Local Board, allow users to choose from list of local boards and text field to enter Name
  + If user selects Employee of local board allow users to choose from list of local boards and text field to enter Name
  + If user selects Member of Advisory body, allow users to choose from list of division /program area and text field to enter name
  + If user selects Employee of the City, allow users to choose from list of division and text field to enter name
* select all councillors to add all councillors to person(s) lobbied
* select all Mayor & Councillors to add all Mayor & Councillors to person(s) lobbied
* notify Councillors and the Mayor lobbied about communication added by lobbyists
* add communication date, methods, meeting requested, meeting arranged
* clear/ delete/ edit information entered for Subject Matter Communication
* display communication/ lobbying activity information entered- Date, method, meeting requested, meeting arranged, person(s) lobbied and Lobbyist name
* link communication added to subject matter registration

1. Security Questions (WCM05)

Ability to:

* change security questions and answers

1. Dashboard (WCM06)

Dashboard should:

* display resource links for lobbyists such as;
  + Terms of Use
  + Glossary of Terms
  + Notice of Collection of Information
  + Lobbyist Code of Conduct
  + Toronto Municipal Code, Chapter 140
  + Code of conduct for member of Council
  + Code of conduct for members of local boards
  + Code of conduct for members of Adjudicative boards
  + Employee Conflict of Interest policy
  + Procurement Process Policy
  + Managing your Lobbyist Registration
  + Managing your Subject Matter Registration
  + Help guide
* display Important Reminder about procurement
* link lobbyist to the following activity;
  + Lobbyist Registration Information
  + Subject Matter Registration Information
  + Add New Subject Matter
  + Add Communication to Subject Matter
  + Change Security Question For Your Password
* display most recent messages/notification and allow lobbyist access previous messages/notifications. Lobbyist should be able to click on messages displayed to view, reply or deleted.
* provide link to reprint Certification Form

1. Mobile View (WCM07)

The lobbyist registration 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
* HTML prototype
* Front-end Development
* 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)

b) LRS Project Team will complete the following:

* Lobbyist Registry System demonstration
* Back-end Development
* 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/ Uni Oh  Web Content Management Group |  |
| Design Sessions | Rob Williams/ Uni Oh,  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 |  |
| Prototype Review | Ibiwumi Ogungbade  Lobbyist Register Project – Business Analyst  Uni Oh,  Web Content Management Group |  |
| Unit Testing | George Ngan,  Lobbyist Register Project – Developer |  |
| Functional Testing  Defect Fixing | Leonid Gofeld,  Lobbyist Register Project Team –  Quality Assurance Lead  George Ngan,  Lobbyist Register Project –Developer |  |
| 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 | George Ngan,  Lobbyist Register Project – Developer |  |

# 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 | Matthew Stockburn |
| Business Analyst | City Clerks IT | Ibiwumi Ogungbade |
| Application Tester | City Clerks IT | Leonid Gofeld |
| Developer | City Clerks IT | George Ngan |
| WCM Project Lead - Acting Digital Media Manager | Web Content Management | Rob Williams |
| WCM Designer | Web Content Management | 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 Registration 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 | | |
|  | | | |
| **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* |