

Board of Pilot Commissioners

IT Modernization Project (ITMP)

Project Overview

June 27th, 2024

Engagement Number: 660002047



A large container ship, the MSC ANNA, is sailing on the water. The ship is dark blue with 'MSC' written in large white letters on its side. The deck is covered with many colorful shipping containers in shades of yellow, red, blue, and green. Above the ship, a large suspension bridge with red steel cables and towers spans across the water. The sky is overcast and grey. The water in the foreground is dark and has some ripples.

Agenda

Introductions

Project Overview

Next Steps

Closing

Introductions

BOPC IT Modernization Project Team



Project Overview

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BOPC Seeks to Modernize its Core Business Functions

Issue and Renew Maritime Pilot Licenses

Review up to 60 maritime pilot licenses (BOPC Licensees) on an annual basis. Key pilot components reviewed include health, job performance, continuing education, federal Coast Guard license status, and good standing with the Department of Motor Vehicles (DMV).

Administer Pilot Continuing Education Program

Periodic training to BOPC Licensees in compliance with statutory and regulatory requirements to support annual license renewals.

Administer Pilot Trainee Training Program

Training program and trainee selection exam for maritime personnel to become a BOPC Licensee.

Administer a Pilot Boat Program

Authorize and fund construction and/or capital improvements of boats owned and used by BOPC Licensees.

Investigate Ship Accidents and Incidents

Investigate alleged misconduct and take actions against pilot licensees if necessary. Maintain historical data related to maritime incidents and incident investigations.

Administer the San Francisco Bar Pilot Pension Plan

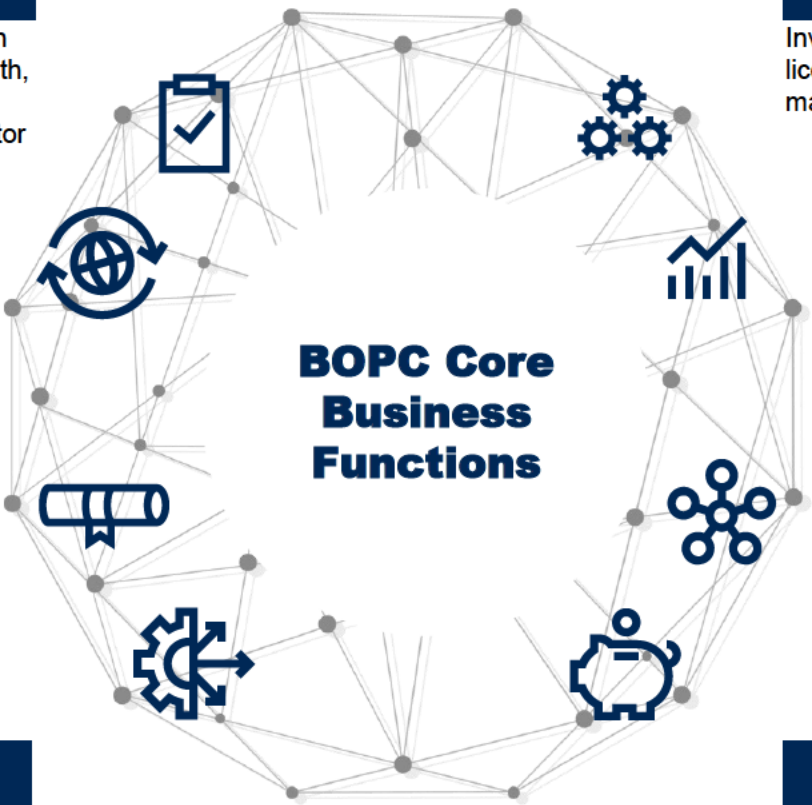
Serve as the primary fiduciary over pension plan for approximately 85 former BOPC Licensees or spousal beneficiaries.

Conduct Pilotage Rate Hearings and Set the Rates

Rate hearings are used to establish fees to be charged by BOPC Licensees for their pilotage services.

Set and Charge Pilotage Surcharges

Establish various revenue-producing pilotage surcharges to fund all core business functions.



Our Understanding of the Current Situation

Current State Pain Points

The BOPC relies on entirely manual processes for its day-to-day operations, which consist of distributed spreadsheets, paper records, and manually prepared reports. This creates pain points which include...

Disparate Data Sources: Data and records are kept either in hard copy only without backup or data tags, or digitally from various sources that require manual processing.

Inefficient Staff Processes: Manual requirements are timely and onerous involving multiple data sources that do not clearly tie together, with an inability to easily track progress.

Increased Risk of Error: Manual entries and lack of automation are prone to increased risk of human error.

Disaster Recovery: No current protection for critical files, documents, and records in the event of a disaster.

Project Objectives for the Target State

The BOPC wishes to implement an information technology solution to integrate all BOPC business functions with one another and enable efficiencies in managing, maintaining, and preserving all services. Key objectives include...

Replace Manual Processing with Automated Solution: Secure automated workflow capabilities to process all business functions.

Consolidate All Data Sources: Consolidate all disparate data sources into a single data system with Disaster Recovery capabilities.

Enable Online Payment & Data Submission: Accept medical status determinations online (25% upon implementation) and online payments (within two years after implementation).

Improve Process Efficiency: Reduce staff time spent processing applications by 40% and developing reports by 50% within 6 months of implementation.

Real-Time Tracking & Reporting: Ability to track incident investigations with real-time reports on status of compliance activities.



Gartner Will Guide BOPC Through the State Process for IT Modernization

CA State
Project
Approval
Lifecycle



What it means

- Define the scope of services to be met by the target solution(s).
- Develop current state and target state process workflows.
- Identify pain points and goals for the target solution(s).
- Draft mid-level solution requirements.
- Conduct market research of available solutions and alternatives.
- Author Alternatives Analysis report highlighting available options and proposed solution(s) forward.
- Draft detailed solution requirements.
- Author Statement of Work (SOW) document and supporting attachments.
- Develop evaluation weights and guidelines.
- Determine solicitation strategy and timeline.
- Collaborate with California Department of Technology (CDT) to finalize solicitation documents.
- Support BOPC through the process of posting solicitation to market.
- Provide support in responding to vendor questions.
- Provide support in evaluation and selection of vendor.

Next Steps

Our Asks & Next Steps

- Gartner is currently interviewing BOPC staff as well as key external stakeholders to fully inform our analysis.
- Our hope is to meet with select members of this Board to understand any desires the Board may have as an end user and to help inform the primary pain points and goals for this project.
- We look forward to working more with you and helping the BOPC modernize their services.



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Thank You

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