

PUBLIC SAFETY SYSTEMS REVITALIZATION PROJECT (PSSRP)



City of Portland PSSRP Initiative Monthly Quality Assurance Report For the Period: 8.19.09 - 9.15.09

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1.0 Report Purpose and Methodology

1.0.1 Period Covered

This monthly report is intended to communicate the results of the independent quality assurance (QA) review of the PSSRP initiative to the City of Portland's Executive Steering Committee (ESC) for the period between August 19, 2009 and September 18, 2009.

1.0.2 Document Version Control

This table provides a history of the document's review:

Version	Date	Reviewed By	Role	Sections Reviewed
v 1.0	9/14/09	Cit Com, Inc	Report Author	All
v 1.0	9/15/09	SEARCH	Consultant/Advisor	All
v 1.1	9/18/09	Cit Com, Inc	Consultant/Advisor	All
v 2.0	9/21/09	Cit Com, Inc	Consultant/Advisor	All
v 2.0	9/21/09	Lisa Vasquez	PSSRP POM	All
v 2.0	9/27/09	Cit Com, Inc	Consultant/Advisor	All
v2.1	10/2/09	ESC	Project Governance	All
v Final	10/6/09	Cit Com, Inc	Consultant/Advisor	All

1.0.3 Personnel Interviewed During the Period

The consultants formally interviewed the following people associated with the PSSRP initiative prior to developing the final report (additional oral discussions and email correspondence were exchanged as well):

Person Interviewed	Date
Mark Greinke	Onsite Interview: September 9, 2009
Mark Tanner	Onsite Interview: September 9, 2009
Karl Larson	Onsite Interview: September 9, 2009
Lisa Vasquez (4)	Onsite Interview: September 9, 2009
Lisa Turley	September 10, 2009
John Klum	September 11, 2009
Jerry Schlesinger	September 14, 2009
Larry O'Dea	September 11, 2009

1.0.4 Project Materials Reviewed During the Period

The consultants reviewed the following project-related documents during the period:

Status Reports

- **CAD Next:** 8/25/09, 9/1/09, 9/8/09, 9/15/09
- **PPDS:** 8/25/09, 9/1/09, 9/8/09, 9/15/09
- **Radio:** 8/25/09, 9/1/09, 9/8/09, 9/15/09

Other Related Documents

- PSSRP 2009-2010 Budget
- PPDS Project Charter
- Radio Project Charter
- Technical Advisory Committee (TAC) Charter

2.0 PSSRP Project Assessment

2.0.1 Executive Summary - Month 11¹

2.0.1.1 Global PSSRP Initiative Summary



2.0.1.2 CAD Next Summary



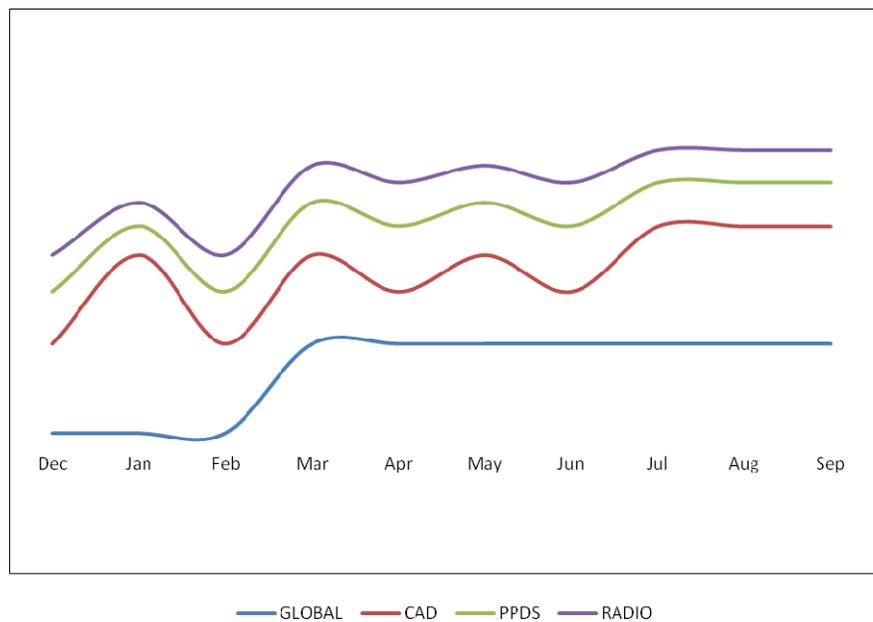
2.0.1.3 PPDS RMS Summary



2.0.1.4 800 MHz Radio Summary



PSSRP QA Evaluation Trends (Dec-08: Sep-09)



¹ Fire RMS will be added as the fifth core PSSRP project under continuous evaluation on 10/1/09

2.0.2 Summary Assessment

The following tables provide the City with an assessment of “what has changed” during the current period.

TABLE LEGEND:

	Green - On target, good performance against plan.
	Yellow - Caution, ability to meet project objectives may be threatened, may need intervention.
	Red - Serious issues and/or go-live in jeopardy, intervention and/or corrective action needed.

	Up - Positive changes outweigh negative.
	Equal - No change, or positive changes offset by negative.
	Down - Negative changes outweigh positive.

PSSRP Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
<p>Global PSSRP Initiative Summary Reflects status of overall initiative (CAD, PD+FD RMS, Radio)</p>				<ul style="list-style-type: none"> ▪ As previously reported, the PSSRP budget may be insufficient to achieve all of the core project goals. Without detailed budget forecasts (for all projects), it is impossible to determine whether the project has been properly budgeted. QA recommends evaluating cost-recovery models of other public safety information technology providers as a conservative approach (should a significant funding gap emerge). ▪ The manner in which subjects are presented to the ESC for review/vote has proven to be awkward in execution. While vital to reforming governance, the Olympic Performance report was not intended to be a project plan. QA recommends that some sections of the report be used as the basis for finalizing the Global PSSRP Project Charter. ▪ QA recommends more frequency ESC meetings to prevent issues from cascading and increase interaction. <p>(See Section 3.0.1 for detailed Global PSSRP Observations)</p>
<p>CAD Next Project Summary</p>				<ul style="list-style-type: none"> ▪ The Versaterm contract tasks have been fulfilled on time, and with high quality marks. ▪ Mr. Tanner’s allotted time as a CAD resource increased during the period. ▪ A Technical Advisory Committee (TAC) has been formed to better manage technical resources. ▪ Two technical issues emerged during the period that focused attention on technical readiness. The addition of an interim Technical Lead (that will chair the TAC) will improve PSSRP-BTS communication and coordination. ▪ The CAD Next Project Charter remains in draft state, and requires finalization. <p>(See Section 3.0.2 for detailed CAD Next Observations)</p>

PSSRP Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
PPDS RMS Project Summary				<ul style="list-style-type: none"> ▪ The RFP remains in draft form, with external entities evaluating the document (particularly the interface portion). QA recommends PPB set a final edit submission date of October 9. ▪ Just over half of the vendors participating in the RFI process have provided onsite product demonstrations. ▪ A draft PPDS Project Charter has been developed, and is under review at the time of report publication. <p>(See Section 3.0.3 for detailed PPDS RMS Observations)</p>
800 MHz Radio Project Summary				<ul style="list-style-type: none"> ▪ The City is investigating options to address end-of-support issues with the City’s existing Motorola radio controllers. Rough estimates budget dollars have been developed in the event the City decides to pursue an interim Motorola solution. This interim solution would provide stability to the existing radio system as well as buy time until the remaining radio component reach end of manufacturer support life in 2017. ▪ Funding concerns dominate the focus of the efforts to regionalize radio. QA recommends a feasibility study of potential regional partners to assess their current positions (financially) in contrast to their initial interest in 2006-2008. <p>(See Section 3.0.4 for detailed Regional Radio Observations)</p>

2.0.3 Detailed Project Change Assessment

Each month, the QA consultants assess forty five critical project management areas for the PSSRP core projects (CAD Next, PPDS RMS, and 800 MHz Regional Radio). The following tables reflect any significant topics within those areas.

[Please note that the numbering of metrics in the first column (Evaluation Metrics) references the PMI numbering sequence in the Baseline Report. Gaps in the numbering sequence are normal.]

2.0.3.1 PSSRP Global Changes (applies to all core projects)

Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
4. Does a complete and current project plan ² exist in writing?	 (Development)		 (Development)	<ul style="list-style-type: none"> The PSSRP Global Project Charter relies upon the adoption of project-specific charter. During the period, plans were drafted for all core projects, and the POM expects the broader charter to be developed in the coming period.
7. Can the project be delivered as approved?	 (Unknown)		 (Unknown)	<ul style="list-style-type: none"> With a sizeable portion of the initial PSSRP budget unfunded, and the lack of a cost forecast model for PPDS and Fire RMS, it is not possible to evaluate this metric.
15. Is there a formal Change Management Plan in place?	 (In Progress)		 (In Progress>1 Month)	<ul style="list-style-type: none"> The revised governance structure was defined by the Olympic Performance report in July. The report identified the vision for addressing PSSRP change management (seeking consensus amongst the ESC members; ultimate authority is the ESC Chair). However, the report did not address specific change management procedures such as the following: <i>Who may bring a subject before the ESC for review? Is there a pre-agreed project impact threshold for ESC review (i.e., dollar amounts, durations of time, quality sacrifices, etc).</i> These specific metrics must be incorporated into the Global PSSRP Charter. While the governance report provided much-needed reform, it was not intended to substitute for a global PSSRP Project Charter (Project Plan) and should not be relied upon for such purposes.
20. Has an experienced				<ul style="list-style-type: none"> The City has authorized PSSRP to recruit, hire and retain a full time

Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
(technical) project manager been assigned to the project?	(No)		(In Progress)	Technical Lead. The candidate will serve as the Chair of the Technical Advisory Group and report to the POM. City personnel have approved the position, and a job announcement is expected to be released in the following period. An interim lead has been assigned to this position for several weeks.
34. Are issues discussed with the project team and Executive Sponsor at least monthly?	 (Yes)		 (Sometimes)	<ul style="list-style-type: none"> PSSRP is uniquely structured in terms of “project sponsorship”. There are four levels of PSSRP sponsorship: 1) The core project sponsorship, which is represented by each Bureau Business Sponsor (BBS); 2) The collective BBS acting as the Executive Steering Committee (ESC); 3) The ESC Chairperson (Carmen Merlo); and 4) Commissioner Leonard. This specific metric changed during the period because the QA Consultant noted the potential for issues and risks to stagnate when the ESC meets quarterly instead of monthly. Although each layer of sponsorship can act upon observed issues and risks, only the ESC can make broad, project-wide, decisions. This particular downgrade stemmed from the observation that a low-grade risk or issue could emerge immediately after the ESC has held their quarterly meeting, precluding action for several weeks or months.

2.0.3.2 CAD Next Change

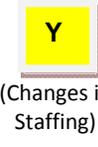
Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
37. Does the Project Manager believe that the external dependencies, interrelationships and deliverables will be met?	 (Yes)		 (Partially)	Successful project completion will require seamless exchanges between BOEC, BTS, Project Management, and vendors. During the period, two technical issues were identified ³ and addressed (delayed delivery of a technical design and a server configuration issues). These issues served to illustrate the need for additional technology personnel (including a

Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
				permanent Technical Lead, two additional technical positions which are currently unfilled, and a fully operational Technical Advisory Committee) and a continuous technical readiness assessment.

2.0.3.3 PPDS RMS Change

Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
13. Will the project meet the deadline for the current phase?	 (1-10% Delay)		 (10+% Delay)	<ul style="list-style-type: none"> The PPDS RMS RFP continues to undergo review from external parties in advance of a final internal review. Notwithstanding the delay, it is widely agreed (by stakeholders interviewed during the past four periods) that it is more important to thoroughly craft the RFP than to expedite its review.
16. Are the changes in requirements achievable given the project scope, schedule, and funding?	 (Partially)		 (No)	<ul style="list-style-type: none"> Without a budget, it is not possible to accurately gauge the impact of requirement changes on the budget. The POM has directed the PPDS Project Manager to update the budget as part of the Project Charter refresh (currently underway). This category will resume a normal status after the draft RFP review is complete and the budget has been adapted accordingly (in case there are any significant technical or functional requirement changes which emerge from the review). Additionally, the collateral impacts of scope changes (which may emerge from the review and/or the RFI process) are not definable at this time.
34. Are external dependencies documented and agreed with an executive from the external entity?	 (No)		 (In Progress)	<ul style="list-style-type: none"> It is significant to note that the number of external executives involved in the PPDS initiative is increasing each period.

2.0.3.4 800 MHz Regional Radio Change

<p>4. Does a complete and current project plan exist in writing?</p>				<ul style="list-style-type: none"> ▪ A Portland Stability Plan has been drafted.
<p>35. Is the Project Steering Committee actively engaged in the progress of the project?</p>				<ul style="list-style-type: none"> ▪ In previous periods, the Radio Project Business Bureau Sponsor (BBS) met biweekly with key project stakeholders.

3.0 Observations and Recommendations

3.0.1 Global PSSRP Observations and Recommendations

3.0.1.1 ESC Meeting Schedule: Following the July governance reform, the ESC was scheduled to meet in-person on a quarterly basis, with regular monthly written updates from the POM and an option to facilitate a meeting on an ad hoc basis. The PSSRP executive sponsorship is uniquely structured with four levels that share project oversight and accountability: 1) The core project sponsorship, which is represented by each Bureau Business Sponsor (BBS); 2) The collective BBS acting as the Executive Steering Committee (ESC); 3) The ESC Chairperson (Carmen Merlo); and 4) Commissioner Leonard. Although each layer of sponsorship can act upon observed issues and risks, only the ESC can make broad, project-wide decisions, leaving open the potential for issues to evolve during the three month gap between ESC meetings.

Recommendation: Typically, public safety projects require monthly Steering Committee meetings to encourage communication and issue resolution. Although the information has been distributed to the ESC members by the POM monthly, there is no substitution for the interaction and spontaneous dialogue which occurs during physical meetings. Less-than-monthly meetings offer convenience, but in exchange; introduce the risk of allowing minor issues to cascade until such time as they may be discussed in person. Therefore, the QA consultants recommend a more frequent ESC meeting interval (preferably monthly). If a physical meeting is too difficult, as a second alternative; the POM could explore the use of videoconferencing during non-meeting months (this has shown to be very effective in other large-scale public safety initiatives wherein the bureau's sponsors find monthly meetings difficult to maintain).

3.0.1.2 Potential Funding Gap: As previously reported, the PSSRP budget may be insufficient to achieve all of the core project goals. Without detailed budget forecasts (for all projects), it is impossible to determine whether the project has been properly budgeted.

Recommendation: Until the budget forecasts are finalized, the ESC should take the most conservative approach toward exploring alternatives for closing potential funding gaps. One such alternative is described in Section 3.0.3.3, wherein PPB would evaluate cost recovery models for multi-agency records management systems. The QA consultants recommend that

similar evaluations occur for all core projects wherein the provision of information technology is extended to non City of Portland public safety agencies.

3.0.1.3 ESC Issue Management: In August, the QA consultants recommended the following (from Section 3.0.1.1):

“Recommendation: As the ESC adapts to the new governance model, many questions that pertain to the ESC’s authority and reach must be addressed (i.e., should change orders of a pre-defined order of magnitude warrant a mandatory ESC review and/or approval?). The earlier these types of issues are discussed and codified, the better. When “rules”, or “decision making parameters” are formed late in an initiative, they carry significantly less authority and appear unfairly tailored toward a particular purpose. Most governance models include such parameters in the Project Charter, and we recommend that the current PSSRP Project Charter redraft effort include a section on ESC issue management to define what global, and project-specific, issues warrant a review and/or action by the ESC.”

Building on this recommendation to refine the Olympic Performance recommendations as part of the Global PSSRP Project Charter, another aspect of this issue emerged during the period. The Olympic Performance report noted the following procedure for ESC issue management:

“Decisions to be voted on by the Steering Committee are supported with a business case presentation, similar to the decision packets provided to the City Council and other decision making bodies. This packet outlines the issue, provides background and comparative research, and offers a staff recommendation. Every attempt is made to provide the decision packet to the voting and advisory members of the Steering Committee, no less than 1-week prior to the Steering Committee meeting.

The Project Management Office, and specifically the Project Office Manager, provides research and recommendations to the Executive Steering Committee.”

Although the Olympic Performance report noted the procedure, it proved to be awkward in execution, with the following core limitations:

1. Developing a “decision packet” for ESC issue management would require significant time to create. The packet would (presumably) need to reflect the views of those in support, and in opposition, to the subject (requiring interviews, data collection, and presentation of the information). The designated arbiter (the POM) has many assigned responsibilities that are time-sensitive, precluding her from

redirecting her attention from core project tasks toward decision packet development.

2. The Olympic Performance report did not identify a cutoff time for submitting issues to the POM for decision packet creation. Consequently, if an issue were to be placed on the agenda within 1 -2 weeks prior to the scheduled meeting, there would be very little time to properly develop a balanced decision packet, pushing the issue's resolution out 90+ days.
3. The approach did not envision a circumstance wherein the POM would either be impacted by, or the subject of, an ESC vote. Consequently, the POM would have to abstain from creating decision packets wherein she would be affected by the ESC vote.

Recommendation: The Olympic Performance report provided much-needed reform, but was not intended to substitute for a global PSSRP Project Charter (Project Plan) and should not be relied upon for such purposes. In addition to the recommendations from the prior period on this subject, the QA consultants also recommend that the POM construct a revised issue management process that is efficient and thorough. Decisions which may impact the POM should be assigned to a neutral, third party, for analysis with recommendations left to the ESC.

3.0.2 CAD Next Observations and Recommendations

3.0.2.1 Implementation Tasks On-Schedule: During the period, the planned Versaterm tasks occurred according to schedule, with high managerial and user satisfaction. The CAD Next Business Bureau Sponsor and the POM were pleased by Versaterm's performance (in terms of quality). The project team confirmed that the target completion date (April-2011) is achievable.

3.0.2.2 Technical Readiness and the Technical Advisory Committee (TAC): During the period, two technical issues occurred which were documented in the September 15 CAD Next Status Report, as follows:

Milestone D: BOEC Network/Firewall Infrastructure: BTS network resource failed to deliver draft design prior to leaving on vacation.

Other Tasks: On-going Implementation Environment Tasks

City: Load of CAD & MDT Applications to BOEC workstations (select offices & conf rooms) delayed due to Proxy Server configuration issues.

While the two technical issues (from the period) were resolved, they nevertheless illustrated the importance of fully staffing the PSSRP technical positions, while conducting ongoing technical readiness evaluations.

To better coordinate the technical resources assigned to the initiative (and all PSSRP initiatives, more broadly), the POM and the CTO have formed an interim Technical Advisory Committee (TAC) chaired by a Technical Lead position (this resource has been authorized by the City, and a recruitment effort is underway to fill the position permanently). A TAC Charter has been ratified, and this committee is now meeting weekly.

3.0.2.3 CAD Next Project Management Increase: Mr. Tanner's allocation toward the CAD Next project increased during the period. Mr. Tanner's exact role (as one of three Project Managers listed in the CAD Next Phase III Project Charter) is under consideration and should be clearly defined in the next revision of the CAD Next Project Charter (due on September 22, 2009).

3.0.2.4 CAD Next Advisory Team Expansion and Meetings: As part of a global PSSRP effort lead by the POM to increase user participation, the number of participants of the CAD Advisory Board expanded in August, and the first meeting occurred during the period.

3.0.3 PPDS⁴ Observations and Recommendations

3.0.3.1 PPDS RMS RFP Under Review: PPB continues to solicit feedback from the subscriber agencies and internal PPB personnel alike. The RFP is transforming into an accurate reflection of business and technical needs for the 40+ agencies which rely upon the current PPDS for their records management purposes.

Recommendation: The PPDS RFP is a complex document that has undergone transformative change in the past 90 days and is nearing completion. In similar regional efforts, the QA consultants have observed a central tendency to strive for perfection in the development of request for proposal documents. While this goal is admirable, it is not always achievable given the breadth of agencies involved in the process (each of whom likely has unique ideas and preferences for business and technical requirements). With more than 40 agencies participating in the review, the chance of extended delays is significant. As the document nears completion, the gains realized by minor edits are significantly reduced (in other words, the last edits to the document will not be as significant as those which were made 30, 60, or 90 days ago). Therefore, to prevent agencies from miring the RFP

development in the review cycle, the QA consultants recommend that PPB institute an October 9, 2009 mandatory deadline for final comments from all non-purchasing/legal personnel, and request dedicated review sessions from City Purchasing and Legal staff.

3.0.3.2 Request for Information (RFI) Update: The PPB has completed five vendor demonstrations, with the remaining three scheduled to be complete by October 1.

3.0.3.3 PPDS Project Charter and Potential Funding Gap: The PPB has prepared a draft Project Plan (Charter), which is currently under review. While the budget allocation is approximately \$13M, the specific budget forecast has yet to be defined (as it can only be derived from the business and technical requirements stated in the RFP).

Recommendation: In the absence of a confirmed budget forecast, the QA consultants recommend that PPB explore cost recovery models (as a conservative approach), should the final cost forecast be greater than available funding. The models (often in the form of joint powers authorities, or memorandum of understanding) should be gathered by PPB during the following period, and analyzed over the next three months. Cost recovery models are common in regional initiatives, and are often considered a reasonable and necessary means for funding the initial and ongoing (total cost of ownership) acquisition of law enforcement technology.

3.0.4 Radio Observations and Recommendations

3.0.4.1 Portland Radio Stability Plan Approved: The Portland Stability Plan was reviewed by internal stakeholders on August 30 (the plan provides Portland with an internal modernization approach, currently wholly separate from the regional efforts).

3.0.4.2 Portland Controller Replacement to be Considered: As part of the local stability plan, Portland has received rough estimates of the cost to replace the existing (Motorola) controllers in approximately 8 months with more contemporary Motorola controllers. The advantage of this effort would be that the City would address current end-of-support concerns with its existing controllers as well as buy time until 2017 when the remaining components of Portland's Radio System will lose manufacturer support. This activity may impact regional radio participants. The extent of any impact, costs and vendor selection assumptions should be reviewed with the ESC no later than November 2009.

3.0.4.3 Regional Funding Concerns: Neither the City of Portland, nor the regional partners have budgeted for the planning, procurement and installation of a regional radio infrastructure.

Recommendation: In light of the national recession, potential regional partners appear hesitant to concretely commit human and financial resources toward regionalization until such time as either: a) The agency's economists predict economic stability, or b) The agency's existing radio communications infrastructure requires replacement. The QA Consultants recommend the participants undertake a low-cost exploration into the current feasibility of regionalization through the use of a survey instrument and accompanying summary of findings. The recommendation is intended to provide: a) A conduit for agencies to refresh their abilities to commit human and financial resources, b) A "reality check" that contrasts agency positions during inception (2007) with current positions, and c) Provide the City of Portland with information which may be relevant when considering the impact of new controllers on nearby agencies.

3.0.4.4 Planning Consultant Preparing to Interview Portland Users: During the following period, iXP is scheduled to interview city radio users to gain an understanding of the "current environment" and preliminary functional goals.

4.0 Prior Recommendations

4.0.1 Prior Recommendation Status

The following chart depicts a record of previous QA recommendations, describing any actions taken by the project team. The chart is updated on a monthly basis. Unaddressed recommendations appear with **red font**.

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
Baseline 5.0.1.1	The PSSRP requires horizontal vision. Currently, the core projects are operating nearly in a vacuum from one another. Very soon, the organization will begin to suffer from this lack of vision as installation tasks associated with integrating CAD and RMS become apparent and costly. We recommend a comprehensive analysis be undertaken immediately, to identify, triage, and solve, the challenges associated with the present stove-piped approach to the core PSSRP initiatives.	Concept Adopted 12/08: 3.0.1.8 (vi, viii)
Baseline 5.0.1.1	We strongly recommend that the PSSRP Project Charter be rewritten to reflect contemporary scope, budget, timeline, values, objectives, reporting structures, risks and more. It no longer accurately reflects the nature of the initiative.	<p>Concept Adopted 12/08: 3.0.1.4</p> <p>6/09: (Recommendation Re-Activated).</p> <p>8/09: Recommendation prioritized.</p> <p>9/09 Update: CAD, PPDS, and Radio Project Charters have been developed and are under review. A Global PSSRP Project Charter should be developed immediately.</p>

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
Baseline 5.0.1.1	<p>With regard to ieSolutions, we credit the organization with aiding BOEC in their successful CAD vendor selection. However, ieSolutions' lack of prior public safety technology installation experience appears to be in conflict with the degree to which they can, legitimately, be defined as the sole source for integration services (even with their knowledge of the Portland environment, which can be learned). Moreover, the public safety technology consulting marketplace includes many experienced integrators, who have previously assisted police and fire agencies with complex CAD installations (including some that have recently installed Versaterm technology). In light of the observations regarding the subject (See Subsection 1.0.3.2. of the Baseline Assessment), we are highly confident that one or more consulting firms will protest an additional sole source contract for ieSolutions. Therefore, to avoid a bid protest, and the resultant delays, we recommend the City immediately prepare and release a request for proposal (RFP) for professional services to assist with installing the Versadex CAD.</p>	Declined 12/08: 3.0.1.3
Baseline 5.0.1.2	<p>A careful examination of the benefits, risks, and costs of a shared PSSRP CAD/RMS/Mobile solution (across police, fire and EMS), with a comprehensive message switching component should be undertaken immediately (during the 60 day CAD contract suspension). Having worked with Versaterm for over four years (in a full time plus capacity), our QA team is highly knowledgeable about the technical, and functional, relationship between the Versadex CAD and the Versaterm RMS, and the Versaterm AFR product [Mobile Report Entry (MRE)]. Of the 40+ CAD/RMS vendors in the industry, Versaterm is certainly in the top percentile of vendors whose suite of products are very, very tightly integrated (unlike some products wherein the CAD and RMS are merely interfaced). In many instances, root CAD functionality can only be actualized through the acquisition of a complementary RMS/MRE feature set. These are merely examples of the barriers which would exist should the City continue down the path of isolating CAD from the RMS and Mobile technologies.</p>	Adopted 12/08: This concept has been adopted and is reflected in the draft project reorganization structure (which includes horizontal business and technical personnel).
Baseline 5.0.1.2	<p>The City should develop language to protect the City's financial interest, should it ever decide to select Versaterm as the RMS/AFR provider and make it a part of the current Versaterm CAD agreement. This is a very common practice in the industry, as police and fire agencies frequently must pay for project elements over a span of years (particularly when projects are funded by grants).</p>	Adopted 12/08: 3.0.2.5 7/09: Not Executed (no such language was incorporated into the final agreement with Versaterm).
Baseline 5.0.1.2	<p>The City must undertake a comprehensive review of the current Versaterm pricing, which appears to be much higher than other recent Versadex CAD costs. Per the POM, BOP is researching this matter as of the date of report publication.</p>	Adopted 12/08: 3.0.2.4

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
Baseline 5.0.1.3	In light of our previous recommendations to evaluate PPDS relative to the balance of the PSSRP initiatives, releasing the RFP at this point would be counterproductive. Additionally, the RFP is still in draft form and requires a careful functional review (to be certain that the requirements accurately reflect both PPB as well as the 18 subscriber agencies), prior to being released to the vendor community.	Adopted 12/08: 3.0.3.1 The RFP is in draft form and has not been released. 9/09 Update: The RFP is under review, and will likely be released in the late fall of 2009.
Baseline 5.0.1.3 Reactivated: 2/09 3.0.3.3	On balance, most RMS initiatives eclipse the complexity, scope, range and cost of CAD initiatives. Yet, since 2006; while much attention and resources were devoted to the CAD Next project, far less has been assigned to PPDS. The current Project Manager is assigned multiple law enforcement initiatives and has an unconventional reporting chain of command that lends itself to a lack of accountability. In our estimation, there are no current employees with previous experience with effectively orchestrating a successful RMS initiative that is used by 19 law enforcement agencies, and relied upon by 25 external entities for data exchange. And, given the embedded governmental problems associated with hiring Project Managers, we have no confidence in the City's ability to find a qualified Project Manager for this complex and mission critical endeavor. Even if the selection process could be fast-tracked, it is still extremely unlikely that a qualified and experienced RMS professional would accept the City's present salary offering for this assignment. The ESC should, immediately, authorize the retention of external, professional services to undertake the recommendations outlined in this QA report and place the PPDS initiative on a stable course.	Initially Declined 12/08: 3.0.3.8 (v) Rather than retaining a consultant, the city is attempting to retain a full time employee. Accepted 5/09: A full time Project Manager started on May 28, 2009.
Baseline 5.0.1.3 Restated 3/09 3.0.3.3	The PPDS project needs a Project Charter that reflects (at the absolute minimum) a basic and accurate budget, detailed timeline, and comprehensive scope statement.	Concept Adopted 12/08: 3.0.3.5 6/09: Recommendation was re-activated as part of the governance reform. 9/09 Update: A draft Project Charter has been developed.

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
Baseline 5.0.1.3	The PPDS technology is in such widespread use, yet there is relatively little involvement on behalf of the participating agencies. Many agencies have no representation at all. And, others appear on forms and websites by name only (they have not actively participated in the initiative). Consortia RMS projects are difficult to manage, and require constant effort. In the current environment, most agencies have lost interest (after all, this has been underway for two years without significant activity), while some are considering how to acquire their own RMS technologies. The PPDS effort must be centered on a collaborative platform that takes into account the project's assumptions, constraints and barriers. Accepting a lack of communication, or collaboration, is not acceptable.	Concept Adopted 12/08: 3.0.3.2
Baseline 5.0.1.4	The initiative requires a Regional Project Charter replete with system definition, development, and implementation before getting to the point of retaining an OE (in fact, such retention should be a component of the Project's Charter). And, ownership must pass to all stakeholders in proportion to their commitment in the regional project.	Concept Attempted 12/08: 3.0.4.5
Baseline 5.0.1.4	The project is in clear need of an Owner's Engineer (OE) with the requisite skills and experience necessary to lead a large scale, regional radio initiative. Priority attention should be given to the development, and approval, of this RFP (which is presently only in conceptual format).	Concept Adopted 12/08: 3.0.4.4 Enacted 6/09
Baseline 5.0.1.5	With regard to any core PSSRP initiative, the ESC should assign control of that resource to the POM (whether it be contractor or full time employee).	Concept Adopted 12/08: 3.0.1.8 Enacted 6/09
Baseline 5.0.1.6	The PSSRP requires the backing of a senior Executive Sponsor (perhaps an elected official) who holds the authority to recognize the PSSRP initiative as a mission critical, high priority, endeavor. The ESC should identify such a person, who would act as the project's advocate whenever necessary, to place focus and prioritization on project tasks.	Concept Adopted 12/08: 3.0.1.3 Enacted 6/09
Baseline 5.0.1.6	To the degree that it is feasible, the ESC should determine the best method for raising the salaries for the core PSSRP Project Managers, as well as the POM to an amount more in line with contemporary market demand. Naturally, this would require additional financial resources to be allocated into the budget. However, failing to make change in this area will cost far more in lost project momentum, and potentially a failed project state.	Concept Adopted 12/08: 3.0.1.5 Enacted 1/09 Employees Hired 6-8/09

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
Baseline 5.0.1.7	The City retain a public safety technology business process analysis consultant immediately. With the CAD installation set to begin in less than 90 days, we suggest that the consultant be retained through a sole source contract, as an exigent circumstance requirement. The scope of services would document the baseline business processes that are, or could be, impacted by technology. This methodology would provide a structured approach for developing a baseline business process “snapshot” of the current environments to confirm or reject various assumptions about the business environments (not to conduct detailed business process mapping).	Concept Adopted 12/08: 3.0.1.8 (viii) Enacted 4/09
12/08 3.0.1.7	When the Versaterm contract is signed, and the PPDS RFP is released, the POM should document the known intersections, and prepare a migration plan accordingly.	9/09 Update: Underway.
1/09 3.0.2.1 (1)	The ESC should direct the CAD Next project team to prepare four implementation schedules, assuming the Versaterm agreement is ratified in March, April, May or June. Although it is unlikely that the agreement will be delayed until May or June, it is important to prepare a contingency plan that is proactive, and takes into account the potential implementation problems associated with starting the project during the early summer months. The four permutations should be presented to the ESC upon completion.	Concept Adopted 1/09 by ESC. 9/09 Update: See 5/09 3.0.2.2 (below).
1/09 3.0.2.1 (2)	Assuming that a post-March contract execution would negatively impact BOEC’s ability to implement the Versaterm products in 2009, the ESC should identify methods for prioritizing the technical, business and legal resources necessary to finalize the Versaterm agreement in a 45-60 day period.	This recommendation was rendered inactive based on the preceding actions.
2/09 3.0.1.3	The QA consultants recommend a facilitated discussion with the current ESC to review “national standards” and examples of similar project governance structures from large municipal public safety technology engagements. As part of the dialogue, the ESC should collaboratively harness the available resources of its members, and proactively assign themselves to specific responsibilities beyond the role of project oversight.	Adopted 7/09 by ESC: The project’s key stakeholders adopted the Olympic Performance report recommendations.
2/09 3.0.2.1	(a) BOEC should consider extending the forecast contract completion date to allow for a 6-8 week process. (b) The City should consider creating a written contract development plan. (c) The ESC should give consideration to videotaping (or audio taping) the contract development session (as many large public safety agencies have adopted this practice in recent years).	(a) N/A (b) Not written, but strategized. (c) Not enacted.
2/09 3.0.3.2	PPB should confirm that each Partner Agency has a clear expectation of what the new PPDS RMS will offer in terms of modules and features.	Adopted 3/09

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
3/09 3.0.2.1	The City (should) set a “date certain” for contract finalization of April 3 (two full weeks prior to the actual deadline), with weekly contract checkpoint meetings (to reinforce urgency, and prevent procrastination). The City should immediately communicate to Versaterm the consequences of failing to reach an agreement in time.	Recommendation rendered inactive when agreement was not reached after April 3.
3/09 3.0.3.3 (Predecessor: Baseline 5.0.1.3)	Developing the PPDS replacement project budget is an urgent, critical recommendation that should be undertaken immediately. The QA consultants have a very low level of confidence in the current ROM forecast.	Concept adopted: 4/09 by ESC. Draft PPDS Project Charter submitted, 9/09.
4/09 3.0.1.2	The May ESC Meeting should be held, regardless of the status of the ESC reform efforts.	Adopted 4/09
4/09 3.0.2.2	Recognizing that the Versaterm agreement was not ratified by the April 20 deadline, BOEC should recalibrate the Phase III timeline (and associated planning materials) to reflect the early Fall/2009 start date described by Director Turley. Additionally, the ESC should direct the POM to craft a contract finalization schedule which reflects a Summer/2009 completion date (with elected official approval at least one month prior to the project kickoff).	The Phase III implementation timeline continues to reflect a Spring, 2011 completion date.
5/09 3.0.2.2 [predecessor: 1/09 - 3.0.2.1(1)]	The ESC should review the merits, limitations, risks and issues associated with the Phase III timeline compression and evaluate whether the various implementation alternatives may impact the remaining PSSRP initiatives.	The issue was raised during the May ESC Meeting. However, no action was taken. ESC members continue to express an interest in gaining a comprehensive understanding of the implementation timeline, costs and associated risks. 9/09 Update: An update will be provided to the ESC in September.
6/09 3.0.1.2	Following the June ESC meeting, the POM should revise the PSSRP Project Charter to align with the many structural changes associated with the final governance reform.	Adopted 7/09 by ESC.
6/09 3.0.2.3	Following the June ESC meeting, ieSolutions should revise the Phase III Project Charter to align with the many structural changes associated with the final governance reform. Additionally, the Project Charter should include (at a minimum) the project’s budget, timeline, methodology and risks.	9/09 Update: The CAD Next Phase III Project Charter has been updated according to the POM. A new release will be available on September 23.

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
6/09 3.0.3.1 (predecessor: 6/09 - 3.0.1.2)	Following the June ESC meeting, PPB should revise the PPDS Project Charter to align with the many structural changes associated with the final governance reform. Additionally, the Project Charter should include (at a minimum) the project’s budget, timeline, methodology and risks.	9/09 Update: See 8/09 3.0.1.3 (below).
7/09 3.0.1.3	The PPDS RFP is currently undergoing a final re-scoping exercise. Once the RFP content has been finalized (in terms of functional and technical requirements), the project team should prepare a revised project budget to confirm whether the \$4M placeholder is sufficient. Concurrently, the project team should evaluate all PSSRP expenses in an effort to ensure affordability of the core technologies (specifically; ensuring that the project will yield the stated goals and objectives).	9/09 Update: Re-scoping efforts are still underway.
8/09 3.0.1.1	As the ESC adapts to the new governance model, many questions that pertain the ESC’s authority and reach must be addressed (i.e., should change orders of a pre-defined order of magnitude warrant a mandatory ESC review and/or approval?). The earlier these types of issues are discussed and codified, the better. When “rules”, or “decision making parameters” are formed late in an initiative, they carry significantly less authority and appear unfairly tailored toward a particular purpose. Most governance models include such parameters in the Project Charter, and we recommend that the current PSSRP Project Charter redraft effort include a section on ESC issue management to define what global, and project-specific, issues warrant a review and/or action by the ESC	9/09 Update: The concept of ESC authority and control is set to be reviewed during the quarterly ESC Meeting in September.
8/09 3.0.1.3 (predecessor: 6/09 - 3.0.3.1)	By October, 2009, revised Project Charters should be in place for each core project. The ESC should provide the POM with any requested human or financial resources necessary to accomplish this task.	9/09 Update: The Project Charters for CAD, PPDS and Radio are in draft form, and a Global PSSRP Charter is being drafted.
8/09 3.0.3.4	As part of the PPDS Project Charter update, PPB must also refresh the budget forecast based on the content of the final RFP.	9/09 Update: The RFP remains in draft status. Once finalized, the budget will be calibrated.