



City of Portland PSSRP Initiative Monthly Quality Assurance Report For the Period: 04.1.10 - 4.31.10

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1.0 Report Purpose and Methodology

1.0.1 PERIOD COVERED

This 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 April 1, 2010 and April 31, 2010.

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	5/1/10	Cit Com, Inc	Report Author	All
v 1.0	5/5/10	SEARCH	Consultant/Advisor	All
v1.0	5/7/10	Cit Com, Inc	Report Author	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 draft report (additional oral discussions and email correspondence were exchanged as well). The POM was interviewed biweekly regarding subjects revealed during project participant discussions. During this period, the consultants interviewed the following PSSRP stakeholders:

Person Interviewed	Date
Lisa Vasquez	Weekly during the period
Lana MacArthur	04-13-10
Kalei Taylor	04-19-10
Mark Greinke	04-27-10
Diana Rogero	04-27-10
Karl Larson	04-27-10
Lisa Turley	04-28-10
John Klum	04-28-10
Jerry Schlesinger	04-30-10
Larry O'Dea	05-06-10

1.0.4 PROJECT MATERIALS REVIEWED DURING THE PERIOD

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

Project Status Reports

- **CAD Next:** 4/6/10, 4/13/10, 4/20/10, 4/27/10
- **RegJIN:** 4/6/10, 4/13/10, 4/20/10, 4/27/10
- **Fire RMS:** 4/6/10, 4/13/10, 4/20/10, 4/27/10
- **Radio:** 4/6/10, 4/13/10, 4/20/10, 4/27/10

Other Related Documents Reviewed During the Period

- RegJIN RFP Evaluation and Selection Criteria Draft
- Fire RMS Final Charter
- Fire RMS Draft RFI Materials

2.0 PSSRP Project Assessment

2.0.1 EXECUTIVE SUMMARY - APRIL 2010

2.0.1.1 GLOBAL PSSRP INITIATIVE SUMMARY



2.0.1.2 CAD NEXT SUMMARY



2.0.1.3 REGJIN RMS SUMMARY



2.0.1.4 RADIO SUMMARY



2.0.1.5 FIRE RMS



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 portfolio</p>				<ul style="list-style-type: none"> ▪ The ESC March 1 deadline to ratify their governance has been set back to June. The absence of a finalized governance structure is the single highest risk factor to any public safety initiative, and has been identified as an urgent, open recommendation for 18 months. Should the ESC be unable to finalize the governance during their June meeting, the global project status will be substantially degraded until such time as governance is ratified. ▪ Following a review by City officials for several months, as part of the annual citywide budget approval process, it appears that the global PSSRP budget remains largely unchanged, with a final budget to be ratified on July 1, 2010. <p>(See Section 3.0.1 for detailed Global PSSRP Observations)</p>
<p>CAD Next Project Summary</p>				<ul style="list-style-type: none"> ▪ During the period, the project team increased their interaction with the three external vendors associated with the project's interface delays, specifically: Zetron, Qwest, and Motorola. While gains were made in recovering some of the slipped time, integration testing scheduled for May will either need to be rescheduled or re-tested, once the three interfaces are ready to be tested. ▪ ieSolutions is facilitating an ad hoc functional script testing process. Approximately 30 features were reported to Versaterm during the period, with the majority corrected (4 were unresolved at report publication). ▪ During the period, the CAD Next team encountered some unexpected problems with the quality of the GIS data (particularly with the partner agencies). Originally targeted for completion on April 21, the deadline was pushed one month to allow for corrections. The move is not expected to impact other project tasks. <p>(See Section 3.0.2 for detailed CAD Next Observations)</p>

PSSRP Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
<p>RegJIN Project Summary</p>				<ul style="list-style-type: none"> ▪ The RegJIN project team worked on developing a final proposal scoring methodology during the period. The QA consultants have recommended that the team use nationally accepted standards to reduce the risk of bid protests. ▪ The RegJIN project team held a pre-proposal conference for competing vendors on April 14, with 17 companies in attendance. ▪ The RegJIN project team finalized, and successfully introduced, a cost sharing formula for the agencies participating in the RegJIN initiative; marking a significant change in the decades-old practice of providing regional law enforcement records management technology without cost. Developing, and successfully introducing, this cost sharing approach is an enormous achievement by both the RegJIN Project Sponsor, as well as the PSSRP/RegJIN project management team. <p>(See Section 3.0.3 for detailed RegJIN RMS Observations)</p>
<p>Radio Project Summary</p>				<ul style="list-style-type: none"> ▪ The project team began examining recent reports of increasing voice radio failures throughout the coverage area (both police and fire). During the period, the team was forming an evaluation methodology in an effort to provide structure to their analysis. ▪ The project team continued to make refinements to the Motorola controller order which is now scheduled to occur in mid-May. ▪ The project team examined the specific timing of the new controller installation and the Versadex CAD cutover date, to identify any potential need for maintaining support continuity with the current CAD provider (Northrop Grumman). ▪ The Regional Radio System Partnership Board met on April 29. The board continued to evaluate timeline extensions to more closely align with the State of Oregon’s radio acquisition effort and discussed the feasibility of an Emergency Communications District to be formed amongst the three counties, and discussed various mechanisms for gauging legal and financial implications. <p>(See Section 3.0.4 for detailed Regional Radio Observations)</p>

PSSRP Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
Fire RMS Summary				<ul style="list-style-type: none"> ▪ The City has finalized one of the two Requests For Information (RFI) pertaining to the Fire RMS. The off-the-shelf RFI has been finalized and released to the vendor community. The second RFI (for open source conversion) is under review with Bureau of Purchases, and is expected to be released in May. ▪ BTS has provided the Fire RMS Project Team with a proposal to rebuild the existing Fire RMS on a contemporary technology platform. The proposal is set to be reviewed in May. ▪ The Fire RMS project planning documents have been drafted, reviewed, edited and resubmitted for final approval (expected in May). <p>(See Section 3.0.5 for detailed Fire RMS Observations)</p>

2.0.3 PROJECT CHANGE ASSESSMENT DETAIL

Each month, the QA consultants assess forty five critical project management areas for the PSSRP core projects (CAD Next, RegJIN, 800 MHz Regional Radio, and Fire RMS). The following tables reflect any significant topics within those areas. *Gaps in the numbering sequence are normal.*

2.0.3.1. PSSRP GLOBAL CHANGES (APPLIES TO ENTIRE PORTFOLIO)

No significant metrics changed during the period.

2.0.3.2. CAD NEXT CHANGE

No significant metrics changed during the period.

2.0.3.3. REGJIN CHANGE

No significant metrics changed during the period.

2.0.3.4. 800 MHZ REGIONAL RADIO CHANGE

No significant metrics changed during the period.

2.0.3.5. FIRE RMS CHANGE

No significant metrics changed during the period.

3.0 Observations and Recommendations

3.0.1 GLOBAL PSSRP OBSERVATIONS AND RECOMMENDATIONS

3.0.1.1 PSSRP GOVERNANCE REMAINS INCOMPLETE

In January, 2010, the ESC convened to review outstanding QA recommendations. The highest-priority open-ended recommendation was the need to finalize PSSRP governance, as defined in the global PSSRP Project Charter. The ESC set a deadline of March 1 to ratify their governance. The deadline passed, and the deadline has been set back to June. The absence of a finalized governance structure is the single highest risk factor to any public safety initiative, and has been identified as an urgent, open recommendation for 18 months. Should the ESC be unable to finalize the governance during their June meeting, the global project status will be substantially degraded until such time as governance is ratified.

3.0.1.2 PROJECT BUDGET APPEARS AUTHORIZED

Recognizing the severity of the national, and local, recession; the portfolio's budget has been under review by City officials for several months, as part of the annual citywide budget approval process. During the period, all of the city's bureaus were focused on meeting budget requirements, constraining available time to commit to the portfolio. On Monday, May 10, the QA consultants learned that the global PSSRP budget appears to have been largely unchanged, with a final budget to be ratified on July 1, 2010. Because the availability of financial resources is a critical project constraint, the project's stability has been jeopardized over the past two months. Once the PSSRP budget is finalized, the overall health of the portfolio will be strengthened.

3.0.2 CAD NEXT OBSERVATIONS AND RECOMMENDATIONS

3.0.2.1. INTERFACE DEVELOPMENT DELAYS

During the period, the project team increased their interaction with the three external vendors associated with the project's interface delays, specifically: Zetron, Qwest, and Motorola. While gains were made in recovering some of the slipped time, integration testing scheduled for May will either need to be rescheduled or re-tested, once the three interfaces are ready to be tested.

The POM and the Project Sponsor are both actively engaged in mitigating the interface development delays. It does not appear that this matter will have an impact on the overall timeline. However, quality and cost are variables which are dependent on the speed with which these three interfaces are completed.

3.0.2.2. AD HOC FUNCTIONAL SCRIPT TESTING UNDERWAY

Presently, ieSolutions is facilitating an ad hoc functional script testing process. The tests are beyond the purview of the contractually-required functional acceptance testing. Versaterm has been cooperatively participating in the ad hoc testing. During the period, approximately 30 features were reported to Versaterm, with the majority corrected (4 were unresolved at report publication).

3.0.2.3. GEOGRAPHIC INFORMATION SYSTEMS (GIS) DEVELOPMENT

CAD systems require an accurate GIS resource in order to operate correctly. Because the source information is often supplied by a third party, or a non-public-safety entity (within local government), GIS-related problems are frequently a source of CAD project delays.

During the period, the CAD Next team encountered some unexpected problems with the quality of the GIS data (particularly with the partner agencies). Originally targeted for completion on April 21, the deadline was pushed one month to allow for corrections. The move is not expected to impact other project tasks.

3.0.3 REGJIN OBSERVATIONS AND RECOMMENDATIONS

3.0.3.1 REGJIN RFP PRE-PROPOSAL MEETING HELD

The RegJIN project team held a pre-proposal conference for competing vendors on April 14, with 17 companies in attendance. A series of questions were presented both orally, and in writing, regarding various aspects of the procurement. The project team prepared answers accordingly.

3.0.3.2 REGJIN RFP EVALUATION AND SELECTION PLAN PENDING

The RegJIN project team worked on developing a final proposal scoring methodology during the period. With thousands of requirements, the City's Bureau of Purchases and Legal Department are committed to ensuring a fair and equitable evaluation and selection procedure, using defensible standards. The Project Manager is currently developing an RFP addendum

that clarifies which requirements are mandatory and sets forth a requirement weighting procedure that is defined in advance of proposal receipt.

Recommendation: Government agencies have conducted thousands of law enforcement records management system acquisitions for over thirty years. In that time, some basic principles of RFP scoring have emerged as being “industry best practices” which eliminate vendor selection confusion and significantly decrease the chances of bid protests. Therefore, as the project team considers the best method for structuring the evaluation and selection criteria, the QA consultants recommend choosing a method that presents the least risk to the initiative; based on nationally-accepted standards and is defensible by the City’s Procurement Services and Legal Department.

3.0.3.3 REGJIN COST SHARING FORMULA DEVELOPED

The RegJIN project team worked collaboratively with the City’s Office of Management and Finance during the period to settle on a cost sharing formula for the agencies participating in the RegJIN initiative. Once finalized, the formula was introduced by the Police Bureau at a Regional Advisory Committee Meeting to the partner agencies who were receptive to the concept.

The current practice of providing police records management technology to the region’s 39 partner agencies, largely without cost, has been in place for decades. Changing institutionally held business practices is always difficult, but especially in law enforcement where traditions are uniquely important. Therefore, the development and successful introduction of a cost sharing formula marks an enormous achievement by both the RegJIN Project Sponsor, as well as the PSSRP/RegJIN project management team: their collaborative work will benefit the City, and the region, for many years to come.

3.0.4 REGIONAL RADIO PROJECT

3.0.4.1. CITY RADIO STABILITY PLAN UPDATE

The project team continued to make refinements to the Motorola controller order during the period. Although the order was expected to occur on April 19, additional time was required to revise the equipment requirements, which necessitated an update to the Motorola Statement of Work and Pricing. The order is now expected to occur in mid-May. Also during the period, the project team examined the specific timing of the new controller installation and the Versadex CAD cutover date, to identify any

potential need for maintaining support continuity with the current CAD provider (Northrop Grumman).

The project team also began examining recent reports of increasing voice radio failures throughout the coverage area (both police and fire). The project team was determining the appropriate entity to assume responsibility for tracking and correcting such defects in the future.

3.0.4.2. REGIONAL RADIO UPDATE

The Regional Radio System Partnership Board met on April 29. The board continued to evaluate timeline extensions to more closely align with the State of Oregon's radio acquisition effort. Additionally, the engineering consultant (iXP) delivered a draft of the functional design report. The Board discussed the feasibility of an Emergency Communications District to be formed amongst the three counties, and discussed various mechanisms for gauging legal and financial implications.

3.0.5 FIRE RMS

3.0.5.1. RFI DEVELOPMENT

The City has finalized one of the two Requests For Information (RFI) pertaining to the Fire RMS. The off-the-shelf RFI has been finalized and released to the vendor community. The second RFI (for open source conversion) is under review with Bureau of Purchases, and is expected to be released in May.

3.0.5.2. INTERNAL REVIEW OF BTS PROPOSAL PLANNED

BTS has provided the Fire RMS Project Team with a proposal to rebuild the existing Fire RMS on a contemporary technology platform. The proposal is set to be reviewed in May.

3.0.5.3. PROJECT PLANNING DOCUMENTS PENDING APPROVAL

The Fire RMS project planning documents have been drafted, reviewed, edited and resubmitted for final approval (expected in May).

4.0 QA Recommendation Summary

4.0.1 QA RECOMMENDATION SUMMARY (UPDATED MAY 1, 2010)

The following table depicts a record of QA recommendations that require action or updating. The table is updated on a monthly basis. Please note that archived recommendations are not reprinted each month (there are approximately 45 archived recommendations which are on file with the POM and the QA Consultant). Lastly, note that the ID numbers are not sequential, as they reflect the order in which they are presented to the ESC.

ID	Recommendation Location	Recommendation Summary	Action Taken	Status of Action	Assigned To	Due By	Complete Date
2	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.	Concept Adopted	03/10: The ESC has yet to meet and finalize the Global PSSRP Project Charter. 01/10: CAD, RegJIN and Radio Project Charters are finalized. The Global PSSRP Charter is in draft form, pending edit and finalization. 05/10: A draft has been circulated to the ESC, which is scheduled to meet in June.	POM/ESC	2/12/2010, moved to 5/1/10, moved to June ESC.	Pending

38	9/09 3.0.1.3	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.	More Information Required	01/10: ESC agreed to review process in the final Global PSSRP Project Charter. 05/10: ESC has draft of revised Global PSSRP Project Charter and will move to ratify it during the June ESC Meeting.	QA/ESC/POM	1/19/2010 pushed to 5/1/2010, moved to June ESC.	Pending
43	10/27/09 3.0.1.1	Additional QA Evaluation Metrics Recommended: The four core PSSRP initiatives (CAD, Police RMS, Fire RMS, Regional Radio) continue to mature and transition into new phases of project activity (i.e., CAD shifting from procurement to implementation). Accordingly, the quality assurance evaluation metrics should be adapted to effectively measure performance. Currently, there are 45 baseline quality assurance evaluation metrics which are used as the “standard” for monitoring PSSRP project performance. Recommendation: The ESC should consider adding the following two quality assurance evaluation metrics to the existing 45: 46. Technical resources assigned to PSSRP are fulfilling the project’s infrastructure, application, and interfacing requirements. 47. Contractor is meeting performance expectations. As part of the decision making process related to this recommendation, the ESC should consider what entity should be responsible for conducting these additional quality assurance	More Information Required	03/10: Following the Jan ESC Meeting, the group agreed to review the health-check metrics used during the SAP project, to see if they applied to PSSRP (and specifically this recommendation). 05/10: Part of this recommendation will be fulfilled by the independent network/technical experts. The procurement process for acquiring this contractor is underway.	POM to Obtain from CTO	1/19/2010 pushed to 6/1/2010	Pending

		tasks, and at what interval (monthly, quarterly, annually).					
44	10/27/09 3.0.1.3.	The QA Consultants strongly urge the ESC to meet, as soon as practical, for a facilitated review of the committee’s reach, authority, and power. The meeting should address the following subjects: a) Determining whether the seven responsibilities (Design approvals, Go-live approvals, Scope changes, Conflict or significant interaction between projects, Budget recommendations to Council, Resource needs, and Policy issues) defined in the Olympic Performance report are valid and represent the breadth of topics subject to ESC controls, b) Identifying additional responsibilities, and c) Documenting specific thresholds within each defined category that warrant ESC review, approval or other formal action (by vote). Additionally, the Olympic Performance report recommended that an agenda and accompanying decision package be distributed to the ESC members one week prior to the quarterly meetings. The Olympic Performance report suggested that these decision packages would be prepared by the POM. However, during the September ESC Meeting, no such packages were created or delivered prior to the meeting date. The level of effort necessary to prepare such a decision package will vary, based on the complexity of the issue. Similarly, the POM’s availability to prepare agenda packages will also vary (based on the constantly shifting workload). The QA Consultants recommend that the POM identify alternative human resources to prepare the quarterly ESC agenda and decision packages. Indeed, several ESC	More Information Required	03/10: The ESC has yet to meet and agree upon these elements for use in the Final Global PSSRP Project Charter. 01/10: PSSRP Chair offered to provide the group with some parameters from past projects to review for applicability to PSSRP. 12/09: The subject of defining ESC control/authority is ongoing (and appears in the current QA report as well). The ESC has enacted some of the elements of this lengthy recommendation, but has not specifically undertaken change in the subset recommendations (a, b and c). For clarity, the QA Consultants have consolidated the various recommendations into smaller, more manageable suggestions in the current report. 05/10: A draft has been circulated to the ESC,	ESC Chair POM/ESC	2/1/2010 pushed to 5/1/2010, moved to June ESC.	Pending

		members felt that one week was insufficient time to adequately prepare for debating and rendering important decisions, requesting a month of lead-time instead. Recognizing that the people who comprise the ESC have diverse backgrounds (and exposure to public safety technology), the QA Consultants recommend that the agenda packages be created and distributed one month prior to the scheduled meeting (for non-exigent matters, which will have to be brought forth by the POM, as an exception). The conservative lead time will ensure that all ESC members have adequate time to prepare for the meetings.		which is scheduled to meet in June.			
45	04/05/10 3.0.2.2.	The CAD Next project team should review the Versaterm contractual obligations associated with functional testing, and validate that the scripted testing is compliant. If the team finds that the scripted testing will evaluate functionality beyond that which is contractually required, the team should identify a process for resolving and shortcomings which emerge from the testing process.					
46	04/05/10 3.0.2.3.	Although cutover is approximately a year out, it is not too soon to plan for sustainability, given the need to allocate human and financial resources to the ongoing support and maintenance of the Versadex CAD. Therefore, we recommend that the POM begin exploration of sustainability requirements and alternatives. Versaterm will provide clients with a sustainability outline, which helps agencies to identify the resource needs of most Versaterm clients.					

47a	04/05/10 3.0.3.2.	The QA Consultants recommend that the RegJIN Project Sponsor direct the POM and RegJIN Project Manager to prepare an analysis of the feasibility of “building” a new, open-source based PPDS RMS.					
47b	04/05/10 3.0.3.2.	The POM and the RegJIN Project Manager should review the report with the RegJIN Sponsor. If the analysis reveals a need to change the project approach, then a formal change request should be submitted to the ESC for approval. Alternatively, the existing Project Charter and resources should remain unchanged.					