



City of Portland PSSRP Initiative Monthly Quality Assurance Report For the Period: 08.15.10 - 10.05.10

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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 August 15, 2010 and September 15, 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	9/15/10	Cit Com, Inc	Report Author	All
v 1.0	9/20/10	SEARCH	Consultant/Advisor	All
v 1.1	9/21/10	Cit Com, Inc	Report Author	All Updated
v 1.2	10/28/10	ESC / Cit Com, Inc	Steering Committee/Author	All
v 1.2	11/05/10	ESC / Cit Com, Inc	Steering Committee/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 throughout the period, regarding subjects revealed during project participant discussions. During this period, the consultants interviewed the following key stakeholders:

Interview Participant	Date
Lisa Vasquez	Bi-Weekly
John Klum	09-13-10
Larry O'Dea	(unavailable during interview period)
Diana Rogero	09-13-10
Jerry Schlesinger	09-13-10
Mark Tanner	09-15-10
Karl Larson	09-15-10
Lisa Turley	09-16-10
Carmen Merlo	09-16-10
Lana MacArthur	09-17-10

Project Materials Reviewed During the Period

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

Weekly Project Status Reports

- **CAD Next:** 8/24, 8/31, 9/7, 9/14
- **RegJIN:** 8/24, 8/31, 9/7, 9/14
- **Fire RMS:** 8/24, 8/31, 9/7, 9/14
- **Radio:** 8/16

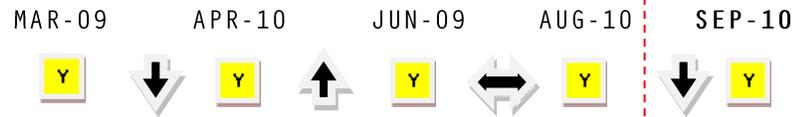
Other Related Documents Reviewed During the Period

- Final PSSRP Global Charter and Governance Models
- RegJIN Evaluation Instructions
- Email Correspondence Regarding CAD Next
- Functional Testing Synopsis (CAD Next)
- CAD Next Project Charter (vfinal)

2.0 PSSRP Project Assessment

2.0.1 EXECUTIVE SUMMARY

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"> ▪ In August, the QA Consultants reported that Police Chief Reese had replaced Assistant Chief O’Dea as the designated Executive Sponsor, with Police Bureau Director Mike Kuykendall attending the bimonthly ESC meetings, as well as directing the ongoing bureau-level activities. However, it now appears that Assistant Chief O’Dea will remain the Executive Sponsor for the foreseeable future, with Director Kuykendall learning about RegJIN in the coming months (in concert with Assistant Chief O’Dea). Schedule permitting, Chief Reese will attend ESC meetings. The lack of executive sponsorship clarity over the past month is detrimental to the health of the initiative. <p>(See Section 3.0.1 for detailed Global PSSRP Observations)</p>
<p>CAD Next Project Summary</p>				<ul style="list-style-type: none"> ▪ In response to a complaint regarding Partner Agency involvement, the CAD Next Project Manager pointed to minimal participation on behalf of the Advisory Team members. A key assumption in the CAD Next Project Charter is that “Partner Agencies will provide staff-member support during design and implementation”. Additionally, one of the Charter’s eight “Major Project Risks” states that “Partner Agency tasks will be completed in a timely manner and with the required quality”. ▪ The CAD Next Functional Acceptance Testing was concluded during the period. As of the report’s publication date, 261 defects had been identified, with the majority (176) having been corrected. Configuration Testing (based on scripted scenarios) is slated to begin in October). <p>(See Section 3.0.2 for detailed CAD Next Observations)</p>

PSSRP Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
RegJIN Project Summary				<ul style="list-style-type: none"> ▪ The evaluation and selection process is being performed by 26 evaluators (with 4 alternates available, if needed), divided into 6 teams responsible for: 1) Qualifications and References, 2) Functional, 3) Technical, 4) Project Approach and Understanding, 5) Cost, and 6) Diversity. ▪ Although the general RegJIN procurement strategy has been approved by Purchasing, the RegJIN project team continues to create tools to assist with finalizing and ranking the completed evaluations, as well as to resolve evaluation discrepancies. <p>(See Section 3.0.3 for detailed RegJIN Observations)</p>
Radio Project Summary				<ul style="list-style-type: none"> ▪ During the period, the project team attended the Motorola equipment staging in Schaumburg, IL. In addition to receiving additional training, the project team and Motorola successfully executed half of the testing in the lab (the balance of testing will be conducted in the field). The equipment is expected to arrive in Portland on September 20. ▪ The Regional Advisory Board met on August 19, and discussed the merits of a single, regional radio solution as well as a “system of systems”. The Board directed iXP to provide expanded detail in their Alternatives and Costs report, as well as the associated Functional Design document. The Board meeting for September was cancelled, with the next meeting scheduled for October 21. <p>(See Section 3.0.4 for detailed Radio Project Observations)</p>

PSSRP Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
Fire RMS Summary				<ul style="list-style-type: none"> ▪ During the period, the Fire Chief reviewed the Draft Findings Report. The project team expects the Fire Chief to make Executive Sponsor-level decisions in early, to mid, October (this is consistent with the planned approach). ▪ During the period, the project team conducted an internal “site survey” to identify the existing fire alerting technology. The project team worked with the CAD Next project team to successfully mitigate a potential issue regarding the interface between the Versadex CAD and the Zetron technology. Preliminary Zetron equipment is expected to be ordered by October 1. <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 global metric changed during the period.

2.0.3.2. CAD NEXT CHANGE

<p>19. Is there a negative impact to the project success due to unresolved issues?</p>				<ul style="list-style-type: none"> On 9/13, the Police Bureau’s CAD Next representative presented a collection of issues to ieSolutions (and five project stakeholders, including Director Turley) in the form of an email. The issues pertained to Versadex mobile functionality, the approach to functional testing, mapping, and implementation procedures. The project team scheduled a meeting with the representative to begin addressing the issues, which maintained the “low” (or green) rating for this category. QA will track progress against the issues in future reports.
<p>32. Are business users actively participating in the project?</p>				<ul style="list-style-type: none"> During the period, while addressing a police representative’s concerns over Partner Agency participation (in the testing phase), the CAD Next Project Manager wrote the following: <i>“While we repeatedly invited the Advisory Team members to work with us at BOEC, we have received minimal participation... rarely more than one person, participating one time and for just a few hours”.</i>

2.0.3.3. REGJIN CHANGE

<p>9. Is there an approved procurement plan in place?</p>				<ul style="list-style-type: none"> Although a general procurement plan has been developed, the project team continues to work on “further development on tools to assist in finalizing and ranking completed evaluations”.
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27. Is the procurement process within schedule?	 (<5%)		 (5-10%)	<ul style="list-style-type: none"> A small extension of time was granted to five evaluators to complete their evaluation of the three proposals. It is unknown how much additional time will be necessary to develop the tools necessary to finalize and rank the completed evaluations.
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2.0.3.4. 800 MHz REGIONAL RADIO CHANGE

12. Will project meet the deadline for the current phase?	 (Yes)		 (1-10%)	<ul style="list-style-type: none"> The antenna installations required for encrypted radios is behind schedule. At the time of QA interviews, a recovery plan was being developed. The delays were not expected to exceed 10% for the phase.
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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 WEEKLY PSSRP MEETINGS AMONGST ACTIVE BUREAUS

During the period, the ESC Chairperson coordinated weekly meetings with representatives from bureaus with active PSSRP-related tasks, to maintain awareness of current project-related events and near-term tasks.

3.0.2 CAD NEXT OBSERVATIONS AND RECOMMENDATIONS

3.0.2.1. PARTNER AGENCY INVOLVEMENT

Two days before the publication of this period's report, the Police Bureau's CAD Next business representative (Officer Garrett Dow) presented a collection of issues to the CAD Next Project Manager (and five project stakeholders, including Director Turley) in the form of an email. In general, the issues pertained to Versadex mobile functionality, the approach to functional testing, mapping, implementation procedures, and a general concern regarding poor participation from partner agencies. The QA Consultants are reviewing the issues, along with the project team.

The CAD Next Project Manager prepared several written responses to Officer Dow, providing explanations and assurances that he would help to mitigate the issues. In response to Officer Dow's concerns about a lack of Partner Agency involvement, he wrote: *"While we repeatedly invited the Advisory Team members to work with us at BOEC, we have received minimal participation... rarely more than one person, participating one time and for just a few hours"*.

A key assumption in the CAD Next Project Charter is that *"Partner Agencies will provide staff-member support during design and implementation"*¹. Additionally, one of the Charter's eight "Major Project Risks" states that *"Partner Agency tasks will be completed in a timely manner and with the required quality"*².

Recommendation 3.0.2.1.(a): The CAD Next Project Team must take the necessary proactive steps to mitigate the risks associated

¹ CAD-Next Implementation Project Charter, Page 4; Assumptions A.2

² CAD-Next Implementation Project Charter, Page 4; Major Project Risks R.2

with Partner Agencies failing to complete their tasks in a timely, and quality manner. Invitations to participate have failed to engage them, and without additional action on the part of the project team, there is no reason to believe that the environment will change.

Recommendation 3.0.2.1.(b): While it is incumbent on the CAD Next Project Team to do everything reasonable and necessary to garner the participation of the Partner Agencies, it is equally important for the executives at each Partner Agency to provide adequate human resources to achieve timely, and quality results. It is imperative that the Partner Agencies also take proactive measures to participate in the CAD Next initiative.

3.0.2.2. FUNCTIONAL ACCEPTANCE TESTING

The CAD Next Functional Acceptance Testing was concluded during the period. As of the report’s publication date, 261 defects had been identified, with the majority (176) having been corrected. The remaining issues are described in the following chart:

Status	08/10	09/10	Comments
Open	17	1	Remaining issue pertains to zero 100 blocks not showing
Not a Defect	50	69	
Discussion	31	2	
Duplicates	4	1	
Enhancements	1	4	<p>The four enhancements pertain to:</p> <p>Priority 3: Moderate Importance</p> <ol style="list-style-type: none"> 1. Fire CAD command (“where”) not functioning properly, although works in Police CAD. <p>Priority 5: Enhancement Requests</p> <ol style="list-style-type: none"> 2. Incoming MDT messages cannot be sorted by user preference. 3. Pick-up call on Police MDT status screen. 4. Additional steps required for MDT users to assign themselves to a call in the queue.
To Be Fixed	4	8	<p>The eight defects to be fixed pertain to:</p> <p>Priority 2: High Degree of Importance</p> <ol style="list-style-type: none"> 1. CAN command not cross referencing duplicate calls. 2. Unable to see "Hazards found using RADIUS search" while in the call mask. 3. Changes to ‘Station Details’ change from Fire to Police. <p>Priority 3: Moderate Importance</p> <ol style="list-style-type: none"> 4. No message to dispatch when remote parties link CAD calls.

			<ul style="list-style-type: none"> 5. Browser call number column cannot be sorted in descending order. 6. Hovering on the browser remarks field does not show initial call remarks. 7. Processing X/Y call issue. 8. No notification in status screen marquee for new call.
Fixed	122	176	
Total	229	261	

Recommendation 3.0.2.2.: On 9/14, the QA consultants were advised by ieSolutions that the eight defects in the “To Be Fixed” row (above) would be corrected as part of a future source update. The City should require Versaterm to correct defects revealed during the functional testing process prior to accepting the solution, in accordance with the agreement.

3.0.2.3. CONFIGURATION TESTING

For approximately a year, ieSolutions has been developing scenarios that will be used for the purpose of conducting Configuration Testing. Unlike functional testing, which examines specific functional requirements, Configuration Testing evaluates how well the CAD meets the business objectives of the enterprise. The two month testing period is scheduled to begin in October.

3.0.3 REGJIN OBSERVATIONS AND RECOMMENDATIONS

3.0.3.1 REGJIN RFP PROPOSAL EVALUATION

During the period, the initial round of proposal evaluation was undertaken by the City. The evaluation and selection process is being performed by 26 evaluators (with 4 alternates available, if needed), divided into 6 teams responsible for: 1) Qualifications and References, 2) Functional, 3) Technical, 4) Project Approach and Understanding, 5) Cost, and 6) Diversity. One evaluator (who was on the Project Approach and Understanding team) withdrew from the process during the period (leaving six additional team members to complete the task). Five evaluators required additional time to complete their assignments, resulting in a minor one-week extension to the current phase.

Although the general RegJIN procurement strategy has been approved by Purchasing, the RegJIN project team continues to create tools to assist with finalizing and ranking the completed evaluations, as well as to resolve evaluation discrepancies.

Recommendation 3.0.3.1. The QA Consultants recommend opening Recommendation 48, to confirm that the RegJIN vendor evaluation and selection tools are consistent with the former recommendation, which stated:

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.

3.0.4 REGIONAL RADIO PROJECT

3.0.4.1. CITY RADIO STABILITY PLAN UPDATE

During the period, the project team attended the Motorola equipment staging in Schaumburg, IL. In addition to receiving additional training, the project team and Motorola successfully executed half of the testing in the lab (the balance of testing will

be conducted in the field). The equipment is expected to arrive in Portland on September 20.

Upon returning to Portland, the project team became aware of a facilities-related concern, resulting in the plan to install the new master site in the main computer room rather than the radio room. The team's attention is now primarily focused on antenna installation required for approximately 200 police radios (in advance of inclement weather), in an effort to avoid schedule delays leading up to the planned November 15 cutover of the new controller.

3.0.4.2. REGIONAL RADIO UPDATE

The Regional Advisory Board met on August 19, and discussed the merits of a single, regional radio solution as well as a "system of systems". The Board directed iXP to provide expanded detail in their Alternatives and Costs report, as well as the associated Functional Design document. The Board meeting for September was cancelled, with the next meeting scheduled for October 21.

3.0.5 FIRE RMS

3.0.5.1. FIRE RMS TECHNOLOGY PROCUREMENT UPDATE

During the period, the Fire Chief reviewed the Draft Findings Report. The project team expects the Fire Chief to make Executive Sponsor-level decisions in early, to mid, October (this is consistent with the planned approach).

3.0.5.2. ZETRON FIRE STATION ALERTING

During the period, the project team conducted an internal "site survey" to identify the existing fire alerting technology. The project team worked with the CAD Next project team to successfully mitigate a potential issue regarding the interface between the Versadex CAD and the Zetron technology. Preliminary Zetron equipment is expected to be ordered by October 1.

4.0 QA Recommendation Report

4.0.1 QA RECOMMENDATION REPORT (UPDATED SEPTEMBER 15, 2010)

The following report depicts a record of previous QA recommendations, describing any actions pertaining to the recommendation, along with specific responsibilities and target completion dates. The chart is updated on a monthly basis. Contemporary subjects are shaded (in light blue, electronically). Recommendations from the prior month's report appear with a white background (no shading). Note that "ID" numbers are not sequential, as they reflect the order in which they are presented to the ESC.

ID	RECOMMENDATION LOCATION	SUMMARY OF RECOMMENDATION	ACTION TAKEN	STATUS OF ACTION	ASSIGNED TO	DUE BY	COMPLETE DATE
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 tasks, and at what interval (monthly, quarterly, annually).	Concept Adopted (Independent 3'rd Party Reviews implemented as needed)	09/10: The RFP for network evaluation is ready for publication in late September.	POM	Pending RFP Release	Pending RFP Release

ID	RECOMMENDATION LOCATION	SUMMARY OF RECOMMENDATION	ACTION TAKEN	STATUS OF ACTION	ASSIGNED TO	DUE BY	COMPLETE DATE
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.	Concept Adopted	09/10: POM sent agency surveys to five agencies (Seattle, San Diego, Boston, Chicago, and Oregon State Police) requesting their 24x7 support models and cost information. Have requested Sustainability outline from Versaterm. Also, EBS support model provided by BTS for review. POM had created a draft CAD Next Sustainment Report.	POM, MA	9/15/10	11/1/10 (estimate by QA)
48	05/05/10 3.0.3.2	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.	Concept Adopted	07/10: The PSSRP has had the rating system to be used by the RegJIN proposal evaluation team approved by Procurement Services. Edits were made at their request that were incorporated in the final version. 09/10: QA Consultants recommend re-opening this previously closed recommendation.	POM (Suggested)	10/15/10 (Suggested)	