

CITY OF PORTLAND

PSSRP
QUALITY ASSURANCE
REPORT

OCTOBER, 2011

VERSION: FINAL

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Summary

INTRODUCTION

The following represents a synopsis of the QA Consultant's key observations and recommendations related to each of the core PSSRP projects.

GLOBAL

The ESC did not meet in October as there were no discussion items and/or decision packages for their consideration. The POM distributed a monthly update to the ESC.

All of the City Bureaus are undergoing a budget analysis, searching for ways to reduce costs by 4, 6 and 8 percent. The budget reduction exercise is time consuming, and taxes many of the PSSRP stakeholders.

CAD NEXT

September October

GREEN

GREEN

The implementation phase of the CAD Next project has ended, with the Versadex CAD now being maintained by the city's sustainment personnel. Although the Versadex CAD implementation is complete, two related technologies continued to undergo refinement during the period: 1) The wireless connectivity to PF&R mobile devices, and; 2) The fire-alerting technology (Zetron).

After carefully evaluating the alternatives, BTS and PF&R have decided to correct the wireless PF&R mobile connectivity issues by replacing the Motorola RDLAP wireless system with Verizon Aircards. The Aircards operate at an average throughput of approximately 1,000 kbps (download) and 650 kbps (upload), representing a substantial improvement over RDLAP's 19.2 kbps throughput. BTS and PF&R have agreed on the approach and costs. Installation will begin during the following period.

As reported last month, the Zetron Task Force, created by Mark Greinke and managed by Vinnie Puglia, resolved the functional problems associated with the fire alerting system. The only remaining issue pertained to the inability to use Zetron's voice alerting using [Voice Over Internet Protocol (VOIP)] on the City's routed network. During the period, BTS presented a proposed solution which was adopted by PF&R, which involves using a BTS mobile based radio in each station. BTS and PF&R will prepare a budget and present the idea to the ESC during the November meeting.

REGJIN

September



October



During the period, the RegJIN project activities were concentrated on:

- Restructuring the Project Plan to accommodate the new acquisition process.
- Refining the RegJIN RFP to incorporate the many positive suggestions brought forth by the collaborative (and multi-bureau) meetings in September and October.
- Revising the Master IGA, to incorporate comments and edits from Lake Oswego, while allowing participating agencies to review the current draft.

The following chart depicts the most recent updates to the acquisition timetable forecast:

	September 14 Timeline		October 28 Timeline		Notes
	Start	End	Start	Finish	
Write the RFP	8/29/2011	11/17/2011	N/A	11/1/2011	Appears to have been completed ahead of schedule.
RegJIN PAC Review	10/18/2011	11/1/2011	N/A	11/1/2011	Completed on schedule.
Legal Review	11/2/2011	11/30/2011	11/28/2011	12/23/2011	Start/Finish dates moved, task duration unchanged.
Reconcile RFP	12/1/2011	12/30/2011	12/23/2011	1/20/2012	Start/Finish dates moved, task duration unchanged.
RFP Released	1/1/2012	2/27/2012	1/23/2012	2/29/2012	The period of time for vendors to bid changed from 58 days to 38. Given the project's complexity, vendors are likely to request extensions.
RFP Evaluation	2/28/2012	6/28/2012	3/23/2012	7/1/2012	Evaluation/selection period changed from 122 days to 101 days.
Contract Development	6/28/2012	12/31/2012	7/1/2012	1/1/2013	Start/Finish dates moved, task duration unchanged.

Although the specific start and end dates are expected to change during this labor-intensive period, it is important to track progress against a chosen baseline measurement in the Project Plan.

Recommendation: The QA Consultants strongly urge the RegJIN project team to provide the ESC with a revised Project Plan (to include, at a minimum; the project's budget, timeline, methodology, risk management plan), as required by PSSRP Charter. This recommendation originally appeared in the September QA report, and should now be considered urgent.

RADIO

September



October



During the period, the contract for the City's radio consultant [Federal Engineering (FE)] was moved forward for Council approval. The Radio project team has been working closely with FE on their initial tasks, and introducing them to the key radio stakeholders. The Radio Project Oversight Committee met on October 25, and the Regional Radio Board met on October 27.

FIRE RMS

September

GREEN

October

GREEN

The Detailed Fire RMS Project Plan continues to be written, as the Proof of Concept and pilot module selection occurs. The Project Consultant (Ed Arib) is developing the Proof of Concept to be presented to the PAC on December 8, 2011. The project's preliminary budget¹ was revealed during the period and reviewed with PSSRP POM, OMF and the CAO. In the coming period, the team will present the budget to the Bureau Project Sponsors and the ESC for formal approval and the identification of funding sources.

¹ The QA consultants reviewed the preliminary budget numbers, but will not publish them or comment on them until they have been adopted by the ESC.

Individual Project Assessments

CAD NEXT

OBSERVATIONS

The implementation phase of the CAD Next project has ended. The products are now being maintained by the city's sustainment personnel (comprised of BOEC, BTS, and Versaterm staff). Although the Versadex CAD implementation is complete, two related technologies continued to undergo refinement during the period: 1) The wireless connectivity to PF&R mobile devices, and; 2) The fire-alerting technology (Zetron).

PF&R mobile units connect to the Versadex CAD using wireless technology. Shortly after the CAD cutover, PF&R mobile units experienced difficulty in establishing and maintaining wireless connectivity. BTS, BOEC, and Versaterm comprehensively evaluated the problem during the summer months, and concluded that some degree of incompatibility exists between the Versadex CAD and the wireless technology in use by PF&R [Motorola's Radio Data Link Access Procedure (RDLAP)].

RDLAP technology operates over the City's 800MHz radio system at a throughput of approximately 19.2 kbps. There is no upgrade/improvement path available for RDLAP, and the future replacement radio system will not include a similar data network.

After carefully evaluating the alternatives, BTS presented PF&R with an analysis of alternatives for solving the connectivity problem resulting in the decision to use Verizon Aircards instead of the RDLAP technology. The Aircards operate at an average throughput of approximately 1,000 kbps (download) and 650 kbps (upload), representing a substantial improvement over RDLAP's 19.2 kbps throughput. BTS and PF&R have agreed on the approach and costs. Installation will begin during the following period.

As reported last month, the Zetron Task Force, created by Mark Greinke and managed by Vinnie Puglia, resolved the functional problems associated with the fire alerting system. The only remaining issue pertained to the inability to use Zetron's voice alerting using [Voice Over Internet Protocol (VOIP)] on the City's routed network. During the period, BTS continued evaluating alternative solutions, including the possibility of using a BTS mobile based radio in each station. This concept would harden the tapout procedures, and eliminate the need for maintaining costly phone lines. During the period, BTS identified the cost to introduce this alternative. BTS and PF&R will prepare a budget and present the idea to the ESC during the November meeting.

During the months of September and October, BTS and PF&R worked tirelessly on triaging, and solving the wireless connectivity and Zetron-related issues. CIO Greinke formed a Task Force to target these two issues, and assigned Vinnie Puglia to manage the effort. During the period, both of the issues were evaluated and a plan for correction was developed. The solutions will be implemented in the following period.

REGJIN OBSERVATIONS

During the period, the RegJIN project activities were centered on:

1. **Restructuring the Project Plan** to accommodate the new acquisition process. The required Project Plan updates should include: A contemporary methodology, timeline, budget, risk analysis, and the project’s goals and objectives (both technical and operational).
2. **Refining the RegJIN RFP** to incorporate the many positive suggestions brought forth by the collaborative (and multi-bureau) meetings in September and October. Specifically: the partner agencies worked with PPB to review, edit and comment on the revised RFP requirements, City Procurement continued the development of the main section of the RFP and revised the RFP’s technology contract.
3. **Revising the Master IGA**, to incorporate comments and edits from Lake Oswego, while allowing participating agencies to review the current draft.

The estimated duration of time associated with the new RegJIN acquisition was defined during a collaborative, multi-bureau session held on September 14. During the current period, some of those milestone dates have changed, as reflected in the following chart:

	September 14 Timeline		October 28 Timeline		Notes
	Start	End	Start	Finish	
Write the RFP	8/29/2011	11/17/2011	N/A	11/1/2011	Appears to have been completed ahead of schedule.
RegJIN PAC Review	10/18/2011	11/1/2011	N/A	11/1/2011	Completed on schedule.
Legal Review	11/2/2011	11/30/2011	11/28/2011	12/23/2011	Start/Finish dates moved, task duration unchanged.
Reconcile RFP	12/1/2011	12/30/2011	12/23/2011	1/20/2012	Start/Finish dates moved, task duration unchanged.
RFP Released	1/1/2012	2/27/2012	1/23/2012	2/29/2012	The period of time for vendors to bid changed from 58 days to 38. Given the project's complexity, vendors are likely to request extensions.
RFP Evaluation	2/28/2012	6/28/2012	3/23/2012	7/1/2012	Evaluation/selection period changed from 122 days to 101 days.
Contract Development	6/28/2012	12/31/2012	7/1/2012	1/1/2013	Start/Finish dates moved, task duration unchanged.

Although the specific start and end dates are expected to change during this labor-intensive period, it is important to track progress against a chosen baseline measurement in the Project Plan.

In addition to working on the revised RFP, the RegJIN Project Advisory Committee (PAC) met with partner agencies to discuss the best use of the \$500,000 in FY2010 UASI grant funds which were supposed to have been used to pay for part of the Unisys/Denali costs. The PAC identified four items for potential funding, and planned on discussing them with the UASI LEWVG at their next meeting. The RegJIN PAC will meet again on November 30, 2011.

RECOMMENDATION

The QA Consultants strongly urge the RegJIN project team to provide the ESC with a revised Project Plan (to include, at a minimum; the project's budget, timeline, methodology, risk management plan), as required by PSSRP Charter. This recommendation originally appeared in the September QA report, and should now be considered urgent.

RADIO

OBSERVATIONS

During the period, the contract for the City's radio consultant [Federal Engineering (FE)] was moved forward for Council approval. The Radio project team worked closely with FE during the period to prepare a set of initial tasks (pertaining to conducting an inventory of the existing radio technology) which are expected to occur in early November. In addition, the Radio project team facilitated a stakeholder's meeting on October 27 to introduce FE, and disseminate a survey instrument provided by FE to gauge stakeholder interest, expectations and participation.

The Regional Radio Board met on October 27, and agreed to retain a strategic planning facilitator, who will meet with the Board in early 2012 to discuss the future of the Board's purpose and role.

The Radio Project Oversight Committee met on October 25 and received an update from PSSRP regarding the FE contract and initial scope of work tasks.

FIRE RMS

OBSERVATIONS

The Detailed Fire RMS Project Plan continues to be written, as the Proof of Concept and pilot module selection occurs. The Project Consultant (Ed Arib) is developing the Proof of Concept to be

presented to the PAC on December 8, 2011. The Fire RMS project team continues to work on the RFP for the technical consultant and expects to be complete in the following period.

The project's preliminary budget² was revealed during the period and reviewed with PSSRP POM, OMF and the CAO. In the coming period, the team will present the budget to the Bureau Project Sponsors and the ESC for formal approval and the identification of funding sources.

² The QA consultants reviewed the preliminary budget numbers, but will not publish them or comment on them until they have been adopted by the ESC.

Project Metric Changes

Each month, the QA consultants assess forty five project management areas for each PSSRP project. The following reflects any change detected during the period amongst the metrics.

CAD NEXT Metric 44: Was a project review conducted with the Project Manager and Executive Sponsor within completion of one business cycle of the project completion?

Metric 45: Were the lessons learned captured, finalized and shared with the control agencies within one month of the project close?

(The City has directed the QA Consultants to begin work on a lessons learned report for CAD immediately. The interviews are underway, and a draft report has been prepared. In addition, the ieSolutions “lessons learned” report is due in the coming period. Both of these metrics will drop from the QA report in the coming period.)

REGJIN Metric 7: Can the project be delivered as approved?
(This metric requires an approved set of goals and objectives, based on the approach prescribed in the Project Plan, which has yet to be delivered to the ESC for approval.)

Metric 12: Is the project on schedule?
(The project’s schedule is more than 10% behind schedule)

Metric 13: Will project meet the deadline for the current phase?
(No)

Metric 14: How many milestones have been missed?
(More than one milestone has been missed)

Metric 19: Is there a negative impact to the project success due to unresolved issues?
(This metric is intensifying as time passes without formal ESC approval of the RegJIN Project Plan).

Recommendation: QA continues to recommend that the revised project schedule and budget be reviewed and approved by the ESC immediately (to move the project back into yellow or green status).

RADIO No change during the period.

FIRE RMS No change during the period.

How we produce the report

PERIOD COVERED	This report is intended to communicate the results of the independent quality assurance (QA) company's review of the PSSRP initiative to the City of Portland's Executive Steering Committee (ESC) for the period of October 1 to October 31, 2011.												
INFORMATION SOURCES	<p>The consultants communicated with the following people prior to developing the report:</p> <table><tr><td>Andrew Carlstrom</td><td>Diana Rogero</td></tr><tr><td>Mark Greinke</td><td>Jerry Schlesinger</td></tr><tr><td>John Klum</td><td>Mark Schmidt</td></tr><tr><td>Karl Larson</td><td>Mark Tanner</td></tr><tr><td>Carmen Merlo</td><td>Lisa Turley</td></tr><tr><td>Vinnie Puglia</td><td></td></tr></table>	Andrew Carlstrom	Diana Rogero	Mark Greinke	Jerry Schlesinger	John Klum	Mark Schmidt	Karl Larson	Mark Tanner	Carmen Merlo	Lisa Turley	Vinnie Puglia	
Andrew Carlstrom	Diana Rogero												
Mark Greinke	Jerry Schlesinger												
John Klum	Mark Schmidt												
Karl Larson	Mark Tanner												
Carmen Merlo	Lisa Turley												
Vinnie Puglia													
MATERIALS REVIEWED	<p>The consultants reviewed the following project-related documents during the period:</p> <p>Project Status Reports RegJIN: 10/4, 10/11 (email report), 10/28 Radio: 10/3, 10/10, 10/17, 10/24, 10/31 Fire RMS: 10/7, 10/14, 10/21, 10/28</p> <p>Other Project-Related Documents ESC Portfolio Update for October Radio Data Cost Options (PPT) RegJIN</p>												

Exhibit A: Status of Prior QA Recommendations

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. Note that “ID” numbers are not sequential, as they reflect the order in which they are presented to the ESC. Recommendations are removed from the list upon completion of the recommendation.

ID	RECOMMENDATION LOCATION	SUMMARY OF RECOMMENDATION	ACTION TAKEN	STATUS OF ACTION	ASSIGNED TO	DUE BY	COMPLETE DATE
60	03/15/11 3.0.1.2	[Recommendation #60 supplements Recommendation #57 from February, 2011, which stated: The ESC should review, and amend (as appropriate), the authorities and controls within the PSSRP Governance document.] As part of the ESC’s review and amendment (as appropriate) of the project authorities and controls (within the PSSRP Governance document), the committee should also define what unit, or form, of Portland City government PSSRP represents.	Accepted	During the period, the POM reviewed existing project charter and governance documents.	Carlstrom	Nov ESC	N/A
64	05/16/11 3.0.2.1	PSSRP should begin interviewing project managers and impacted stakeholders regarding “lessons learned” immediately (a “lessons learned” report should be prepared by the July ESC meeting).	Accepted	QA is conducting interviews and preparing the draft report.	QA	11/1 moved to 12/1	Pending
66	06/23/11 3.0.1.3	The ESC should direct PSSRP to update the communications plan to include a designated person (or persons) to interact with the media, ensuring consistency and accuracy.	Accepted	The ESC agreed with the recommendation, asking POM Carlstrom to determine a specific approach toward instituting the concept. The person and mechanics of the role have yet to be defined.	Carlstrom	Nov ESC	N/A

ID	RECOMMENDATION LOCATION	SUMMARY OF RECOMMENDATION	ACTION TAKEN	STATUS OF ACTION	ASSIGNED TO	DUE BY	COMPLETE DATE
71	August Report Page 8	The RegJIN Project Plan should be updated to reflect the current known project schedule changes, including a contemporary revision to duration for contract development with Unisys. Recognizing that PPDS support is currently forecast through June, 2013, and that the project schedule now shows an estimated go live in August, 2013; QA recommends that the project team undertake a PPDS risk analysis and mitigation plan for supporting PPDS through 2014 (including hardware, software, and support personnel).	Discussed/Under Evaluation	Although the RegJIN initiative has been restarted, the need for a modest risk analysis of PPDS continues to exist. The project team has evaluated the risks, but thus far; the risks have not been incorporated into the Project Plan.	Carlstrom Schlesinger	Nov ESC	N/A
72	October Report Page 6	Sparked by the Council Champion, and spearheaded by the CAO and the POM, the project undertook a literal multi-bureau approach (which, in the past, has proven to be very difficult) toward recalibrating the RegJIN acquisition. In the following period, the project team should provide the ESC with a new timeline and budget for RegJIN, seeking formal adoption. Both the timeline and the budget should reflect the level of effort associated with maintaining PPDS through the estimated RegJIN cutover date in 2014. A 15% contingency (an industry standard) of time and money should be added to the timeline and budget, respectively.	(pending ESC review in Nov)	N/A	N/A	N/A	N/A
73	October Report Page 8	The QA Consultants recommend that the Zetron project be dropped from the list of core projects following the September report, as the majority of issues are either corrected or nearing correction. Moreover, ongoing Zetron maintenance and activities will be addressed under the CAD Sustainment Model.	(pending ESC review in Nov)	N/A	N/A	N/A	N/A