PUBLIC SAFETY SYSTEMS REVITALIZATION PROJECT (PSSRP)

City of Portland PSSRP Initiative Monthly Quality Assurance Report For the Period: 2.18.09 – 3.17.09

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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 February 18, 2009 and March 17, 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	3/10/09	Cit Com, Inc	Report Author	All
v 1.0	2/10/09	SEARCH	Consultant/Advisor	All
v 1.0	2/11/09	Mark Greinke	CTO	All
v 1.0	2/10/09	Dan Bauer	POM	All

1.0.3   Personnel Interviewed During the Period

The consultants interviewed the following people associated with the PSSRP initiative prior to developing the current draft:

Person Interviewed	Date
Kalei Taylor	February 24, 2009
Jim Finch	March 3, 2009
Gordon Huntsman	March 6, 2009
Diana Mekelburg	March 11, 2009
Mark Greinke	March 12, 2009
Assistant Chief O'Dea	March 9, 2009
Lisa Turley	March 11, 2009
Chief Klum	March 16, 2009
Ken Rust	March 16. 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: 2/17/09, 2/24/09, 3/3/09
- PPDS: 2/20/09, 2/27/09, 3/6/09
- Radio: 2/20/09, 2/27/09, 3/6/09

Other Related Documents

- "System End of Support" [Radio System Evaluation (3/4/09)]
- Evaluation of Various Radio Approaches [Excel File (3/4/09)]
- PPDS RMS RFP (latest version on March 10, 2009)

2.0   PSSRP Project Assessment

2.0.1   Executive Summary

This report is the fourth monthly quality assurance report of the PSSRP initiative (the initial report was a baseline). While the following subsections explore specific observations and recommendations that impact the monthly color assignment, this Executive Summary is intended to provide a snapshot of the PSSRP initiative over the last four reporting periods in contrast to the baseline.

2.0.1.1.   Global PSSRP Initiative Summary

BASELINE	DEC-08	JAN-09	FEB-09	MAR-09
R ↑	R ↓	R ↑	Y ↔	Y

2.0.1.2.   CAD Next Summary

BASELINE	DEC-08	JAN-09	FEB-09	MAR-09
G ↔	G ↓	R ↑	Y ↓	Y

2.0.1.3.   PPDS RMS Summary

BASELINE	DEC-08	JAN-09	FEB-09	MAR-09
R ↑	R ↔	R ↑	Y ↓	Y

2.0.1.4.   800 MHz Radio Summary

BASELINE	DEC-08	JAN-09	FEB-09	MAR-09
R ↔	R ↑	R ↑	Y ↔	Y

2.0.2 Summary Assessment

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

TABLE LEGEND:

G   **Green** - On target, good performance against plan.

Y   **Yellow** - Caution, ability to meet project objectives may be threatened, may need intervention.

R   **Red** - Serious issues and/or go-live in jeopardy, intervention and/or corrective action needed.
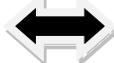
Up - Positive changes outweigh negative.

Equal - No change, or positive changes offset by negative.

Down - Negative changes outweigh positive.

PSSRP Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
Global PSSRP Initiative Summary Reflects status of overall initiative (CAD, PD+FD RMS, Radio)	Y	↔	Y	▪ During the February 17 PSSRP ESC Meeting, the committee discussed a February QA report recommendation to reform the committee's composition and responsibilities. Mark Greinke is coordinating with an external, third-party facilitator to assist with updating the PSSRP governance structure. ▪ The Project Office Manager (POM) selection process has yielded a number of qualified candidates. The City will likely select a finalist in the following period. **(See Section 3.0.1. for detailed Global PSSRP Observations)**
CAD Next Project Summary	Y	↓	Y	▪ The City's negotiating team formalized their contract finalization approach. ▪ Although the City provided Versaterm with a complete contract package on February 4, Versaterm did not provide a comprehensive response (as anticipated) on March 4. Rather, the company sought clarification and requested additional time (which was granted). ▪ Assuming an implementation start date in early May (Phase III), ieSolutions has prepared a draft Project Charter (and other planning materials). This is widely viewed as a wise effort that may compensate for lost time during the delayed contract finalization process. ▪ Significant project delays are possible (measured in multiple month increments) if the contract development process continues to fall behind revised predictions. **(See Section 3.0.2. for detailed CAD Next Observations)**

PSSRP Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
PPDS RMS Project Summary	Y	⬇	Y	▪ The PPDS RFP is nearing finalization, with a draft delivered to the CTO on March 5. ▪ PPB has articulated the roles and responsibilities of its partner agencies (particularly during vendor evaluation and selection). ▪ The project team continues to rely upon a rough order of magnitude from 2006 instead of a comprehensive project budget. **(See Section 3.0.3. for detailed PPDS RMS Observations)**
800 MHz Radio Project Summary	Y	⬌	Y	▪ The City has completed an internal risk assessment of existing Motorola radio infrastructure (identifying the criticality of maintaining the SmartZone controller). ▪ The Regional Project Manager selection process has been modified to allow for the use of a consulting firm with a depth of resources. The change in selection approach will cause a minor delay in securing a Regional Project Manager. ▪ Fire Chief Klum has been added as a member of the Regional Radio Board, representing the region on the OWIN Steering Committee. **(See Section 3.0.4. for detailed Regional Radio Observations)**

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 change within those areas.

2.0.1.1.   CAD Next Change

Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
12. Is the project on schedule?	**R** (10%+ Behind Schedule)	⬇	**R** (10%+ Behind Schedule)	▪ Although Phase II has already been recorded as behind schedule, the revised forecast for contract completion (March 9) will be missed.
13. Will project meet the deadline for the current phase?	**R** (10%+ Behind Schedule)	⬇	**R** (10%+ Behind Schedule)	▪ The CAD Next project will not be able to meet the revised contract completion forecast of March 9.

Note that the numbering of metrics in the first column (Evaluation Metrics) references the Baseline Report categories. Gaps in the numbering sequence merely reflect the fact that some categories remain unchanged from the prior reporting period.

2.0.1.2.   PPDS RMS Change

Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
4. Does a complete and current project plan exist in writing?	**Y** (Nearing Completion)	⬇	**Y** (Nearing Completion)	▪ The project's budget remains undeveloped. As a result, the Project Plan is incomplete.
8. Is there a budget or expenditure mechanism in place?	**Y** In Progress	⬇	**R** No	▪ The project's budget remains incomplete. (While an expenditure tracking mechanism is in place, there is no current budget).

2.0.1.3.   800 MHz Regional Radio Change

No substantive changes were recorded during the period.

3.0   Observations and Recommendations

3.0.1   Global PSSRP Observations and Recommendations

3.0.1.1.   **Executive Steering Committee (ESC) Structure Reform:** During the February 17, 2009 ESC Meeting, the committee discussed a February QA report recommendation[1] to reform the committee's composition and responsibilities. Committee members noted that as each of the four core PSSRP projects undergoes transformative change, the demands placed upon the ESC members increase in both complexity and consequence. Following the discussion, Mark Greinke directed Dan Bauer to schedule a meeting to evaluate alternative governance structures and responsibilities. Mr. Greinke has identified a potential third-party (external) to assist with reforming the governance structure and will retain the facilitator as quickly as the City's purchasing process will allow.

3.0.1.2.   **Project Office Manager (POM) Recruitment Nearing Completion:** After receiving approximately 90 applications in February, the City has narrowed the list of applicants and has conducted several personal interviews. It appears that the City will be able to identify a finalist within the next period (prior to April 21). In the interim, Dan Bauer will continue to serve as Acting POM.

3.0.2   CAD Next Observations and Recommendations

3.0.2.1.   **Versaterm Contract Finalization Delayed:** After delivering a complete contract package to Versaterm on February 4, the City formalized a final contract development approach. Kalei Taylor (City Legal) infused the approach with tactical and strategic elements, Dan Bauer assumed control over coordinating the final contract development scheduling from Mr. Finch (who seamlessly shifted all of his attention toward finalizing the "CAD-Next Phase III: Implementation Project Plan"). Although the team did not codify their approach[2], they nevertheless undertook a series of actions that provided structure and unified the City's position (focused primarily on controlling contract development communications and defining the City's tolerance for language changes in advance of meeting with Versaterm). The negotiation team expected Versaterm to produce a comprehensive response (to the February 4 package) by Wednesday, March 4. However,

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[1] February, 2009 PSSRP QA Report (Section 3.0.1.3. – ESC Structure)
[2] A February, 2009 PSSRP QA Report recommendation (Section 3.0.2.1. – Versaterm Contract Materials Delivered)

Versaterm failed to provide a complete "offer in compromise". Rather, the company sought clarification and additional time, which was granted. As noted in the February QA report, the Versaterm contract will require additional time (beyond the forecast March 9 date) to complete.

The CAD-Next project team evaluated the impact of a delayed contract execution on the project's time, cost and quality in early February, 2009. The issue was identified in the February QA report[3] and discussed during the February ESC meeting, under the assumption that the agreement would be ratified on March 9. Although later than originally planned, a mid-March contract approval could have been accommodated by adjusting the "Production Environment Build" tasks to occur earlier than previously forecast (enabling the planned February 27, 2011 go-live date to remain intact). In fact, the agreement could be approved as late as April 20 and still allow the implementation schedule to remain intact. The CAD-Next project team identified a seemingly-conservative planned start date in early May (to allow for any additional minor contract development delays).

Recommendation: It is difficult to determine whether the City and Versaterm will be successful in reaching an agreement. Versaterm has been slow in producing negotiated positions, leaving the City to adjust the implementation schedule accordingly. Recognizing that BOEC cannot undertake labor-intensive project activities during peak-volume periods (as presented by Dan Bauer and Lisa Turley during the February ESC Meeting), the potential for serious delays (of several months) is eminent, and will occur unless the agreement is approved no later than April 20.

To avoid such delays, the QA consultants recommend the City 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, including: failure to initiate the project in 2009; losing project funding; and/or re-bidding the CAD-Next project entirely, by adding it into the eminent PPDS RFP, as part of an integrated public safety suite procurement.

3.0.2.2. **Draft CAD Next Phase III Project Charter Developed:** ieSolutions has delivered a draft Project Charter (for implementing the Versadex CAD) to Mark Greinke, Lisa Turley and Dan Bauer. The

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[3] February, 2009 PSSRP QA Report (Section 3.0.2.2. – Contract Delays Evaluated)

document is based on best-practices and lessons-learned from Phase II, and will likely be ratified during the week of March 16. The Charter assumes an early-May start date, and is progressing independent of the contract development process. Developing the planning documents in parallel with contract negotiations is wise, as it maintains project momentum and offsets potential delays.

3.0.3   PPDS Observations and Recommendations

3.0.3.1.   **PPDS RMS RFP Nearing Completion:** The final PPDS RMS RFP edits were presented to Mark Greinke for review on March 5. The RFP now includes many of the recommendations and suggestions made during the past six months. However, the document remains incomplete and will require additional modification before the Bureau of Purchases can release the file to the RMS vendor community.

3.0.3.2.   **Partner Agency Involvement:** During the period, PPB drafted a committee structure for the partner agencies, setting forth their respective roles and responsibilities. The structure helps to define the obligations of the partner agencies with respect to vendor selection and agency-specific module identification.

3.0.3.3.   **PPDS Budget Delayed:** The PPDS replacement project continues to rely upon the "rough-order-of-magnitude" (ROM) cost as defined by the former CTO in 2006. The ROM lacks adequate detail in any traditional budget category (i.e., hardware, software, services) and fails to provide an accurate basis for the financial element of the initiative. The QA consultants have recommended that a detailed project budget be crafted for the past six months.

Recommendation: 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.

3.0.4   Radio Observations and Recommendations

3.0.4.1.   **Internal City Radio Assessment Complete:** During the period, the City finalized their internal risk assessment of the existing radio infrastructure, revealing the need to carefully maintain and replace the aging Motorola SmartZone Controller, as it represents a single-point-of-failure. The City's efforts toward identifying, and mitigating, risk independent of regional efforts is both appropriate and wise.

3.0.4.2.   **Regional Project Manager Recruitment Modified:** The Regional Project Manager recruitment approach has been modified to allow for consulting firms (with multiple project managers) to provide proposals. The selection change will cause a minor delay in securing a Regional Project Manager.

3.0.4.3.   **Planning Consultant RFP On-time:** The Planning Consultant RFP process continued on time during the period, with the City responding to vendor questions (as planned).

3.0.4.4.   **Regional Radio Board Representation:** Chief Klum has been added as a member of the Regional Radio Board, representing the region on the OWIN Steering Committee.

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.

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.	Concept Adopted 12/08: 3.0.1.4
Baseline 5.0.1.1	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.	Declined 12/08: 3.0.1.3

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
Baseline 5.0.1.2	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.	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	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).	Adopted 12/08: 3.0.2.5
Baseline 5.0.1.2	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.	Adopted 12/08: 3.0.2.4
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.

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
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.	Declined 12/08: 3.0.3.8 (v) Rather than retaining a consultant, the city is attempting to retain a full time employee. **Update – 3/09: This recommendation was re-activated in February, 2009 (no action taken as of March).**
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
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

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
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
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
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
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
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)

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
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.	Pending decision
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. See 3.0.2.1 of this report for more details.
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.	Concept Adopted 2/09 by ESC. See 3.0.1.1 of this report for more details.
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. See 3.0.2.1. of this report for more details. (c) Under consideration.
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 See 3.0.3.2. of this report for more details.