PUBLIC SAFETY SYSTEMS REVITALIZATION PROJECT (PSSRP)

City of Portland PSSRP Initiative
Monthly Quality Assurance Report
For the Period: 6.17.09 - 7.22.09

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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 June 19, 2009 and July 21, 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	7/17/09	Cit Com, Inc	Report Author	All
v 1.0	7/20/09	SEARCH	Consultant/Advisor	All
v 1.0	7/23/09	Lisa Vasquez	PSSRP POM	All
v 1.0	7/23/09	Mark Greinke	Business Bureau Sponsor	All
v 1.0	7/23/09	Lisa Turley	Business Bureau Sponsor	All
v1.0	7/23/09	John Klum	Business Bureau Sponsor	All
v1.0	7/23/09	Larry O'Dea	Business Bureau Sponsor	All
v1.1	7/30/09	Cit Com, Inc.	Report Author	All
v1.1	7/30/09	SEARCH	Consultant/Advisor	All

1.0.3 Personnel Interviewed During the Period

The consultants interviewed the following people associated with the PSSRP initiative prior to developing the final report:

Person Interviewed	Date
Carmen Merlo	July 2, 2009
Lisa Turley	July 6, 2009
Jerry Schlesinger	July 6, 2009
Diana Mekelburg	July 6, 2009
Mark Greinke	July 6, 2009
Jim Finch	July 9+17, 2009
Lisa Vasquez	July 10, 2009
Larry O'Dea	July 17, 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:** 6/16/09, 6/23/09, 6/30/09, 07/07/09, 07/14/09
- **PPDS:** 6/19/09, 6/26/09, (holiday), 7/10/09, 7/17/09
- **Radio:** 6/19/09, 6/26/09, (holiday), 7/10/09, 7/17/09

Other Related Documents

- Final PSSRP Governance Conclusions Report

2.0   PSSRP Project Assessment

2.0.1   Executive Summary

This report is the ninth monthly quality assurance report of the PSSRP initiative. While the following subsections explore specific observations and recommendations that impact the monthly color assignment, this Executive Summary provides a graphical comparison between the current period and the preceding four periods.
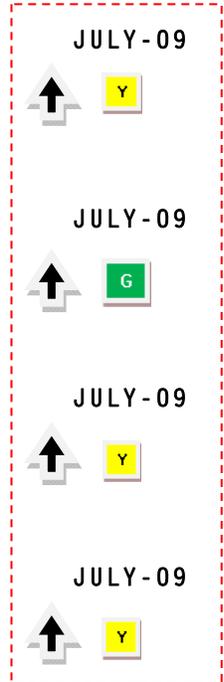
2.0.1.1   Global PSSRP Initiative Summary

MAR-09		APR-09		MAY-09		JUN-09		JULY-09
Y	↓	Y	↑	Y	⬌	Y	↑	Y

2.0.1.2   CAD Next Summary

MAR-09		APR-09		MAY-09		JUN-09		JULY-09
Y	↓	R	↑	Y	↓	R	↑	G

2.0.1.3   PPDS RMS Summary

MAR-09		APR-09		MAY-09		JUN-09		JULY-09
Y	↑	Y	↑	Y	⬌	Y	↑	Y

2.0.1.4   800 MHz Radio Summary

MAR-09		APR-09		MAY-09		JUN-09		JULY-09
Y	⬌	Y	↑	Y	↑	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	▪ The governance reform effort is complete, with a final report delivered on June 24. The new governance was determined by consensus. ▪ The key project staffing positions have been filled, including full time Project Managers for CAD Next/Fire RMS and the radio initiative. ▪ With the conclusion of the Versaterm contract, the final dollar cost for the CAD has been set at approximately $7M (36% was allocated to future maintenance). Given the complexity of the PPDS RMS replacement, the budget of $4M appears to be too low. The QA consultants are concerned that the budget may require modification, once the final PPDS RMS RFP has been drafted. **(See Section 3.0.1 for detailed Global PSSRP Observations)**
CAD Next Project Summary	Y	⬆	G	▪ The Versaterm contract was approved by the City Council on June 10, and signed by Versaterm on July 3. The contract is currently awaiting final internal City signatures. ▪ Phase III implementation is underway, with efforts focused on the initial implementation session (to configure the way CAD will function in Portland). ▪ The City has retained a full time employee who will spend the majority of his time serving as the CAD Next Project Manager. He has extensive experience in implementing dispatch technology. **(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 draft PPDS RMS RFP is being reviewed by the new Project Manager and a wide group of new, and traditional, reviewers. The RFP review will carry through August, and may be released in September. ▪ PPB facilitated a PPDS/RMS stakeholder meeting which garnered a very large group (reportedly between 70- 100 attendees). PPB leveraged the attendees, and is forming working groups and a liaison committee. These actions will significantly improve the quality of both the procurement instrument, as well as the ultimate implementation. **(See Section 3.0.3 for detailed PPDS RMS Observations)**
800 MHz Radio Project Summary	Y	↑	Y	▪ Mr. Karl Larson has been assigned as the Portland Radio Project Manager. ▪ The Planning Consultant (iXP) contract has been pushed to the July 29th Council Agenda. ▪ The Advisory Committee continues to review the four proposals for the Regional Project Manager/Coordinator. ▪ The City of Portland is developing an internal plan to ensure a stable, and reliable, radio infrastructure, notwithstanding any external projects. This plan has been named the "Stabilization Project" and is on a parallel path to the regional effort. **(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 significant changes within those areas.

2.0.3.1 CAD Next Change

Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
13 Will project meet the deadline for the current phase?	**R** (>10% Delay)	⬆	**G** (In Progress)	▪ Phase III has begun, and is "on track" in terms of timeline forecasting.
20. Has an experienced Project Manager been assigned to the project?	**Y** (Partial)	⬆	**G** (Yes)	▪ The City has hired a full-time City of Portland employee. There are now multiple project management resources for the CAD Next initiative.

2.0.3.2 PPDS RMS Change

Evaluation Metrics	Prior Rating	Change Direction	Current Rating	Comments
32. Are business users actively participating in the project?	**Y** (Sometimes)	⬆	**G** (Yes)	▪ PPB has significantly expanded the number of business users involved in the initiative during the prior period.

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.

2.0.3.3 800 MHz Regional Radio Change

20. Has an experienced project manager been assigned to the project?	**Y** (No)	⬆	**G** (Yes)	▪ The City's new Project Manager has specific voice radio technology experience.
21. Is the Project Manager the same as when the project started?	**G** (Yes)	⬇	**Y** (No)	▪ No.

3.0 Observations and Recommendations

3.0.1 Global PSSRP Observations and Recommendations

3.0.1.1 Governance Reform Finalized: Olympic Performance facilitated a working session with key project stakeholders on June 16 to finalize the proposed governance reforms. The resulting PSSRP Governance document was finalized and distributed on June 24. The report contained detailed responsibilities for the project's governance, and described the manner in which decisions would be brought forth to the restructured Executive Steering Committee (ESC).

The reformed PSSRP governance was adopted by consensus and addressed the principle concerns raised in February (by several members of the former ESC). The new structure and authorities are much more closely aligned with nationally-recognized public safety technology management standards[1]. Specifically, the decision-making structure relies more heavily on those directly affected by the outcome. Additionally, the project controls have been revised to facilitate a more efficient and horizontal project management philosophy by centering greater project accountability and authority with the Project Office Manager.

3.0.1.2 Key Project Staff Retained: During the period, the City filled the remaining core PSSRP project management positions, thus fulfilling the ESC decision to assign dedicated City of Portland project managers to each initiative. The CAD Next Project Manager is Mark Tanner[2], and the Radio Project Manager is Karl Larson. Pursuant to the PSSRP Governance report, all three Project Managers report to the POM, who binds the individual projects together in order to achieve the City's global PSSRP goals.

With full time project management at the bureau and project levels, the overall initiative is now staffed in a manner consistent with similar (large-scale) public safety technology programs through the country. The specific people assigned to the key managerial positions possess an exceptional depth of experience with regard to planning, acquiring, implementing and managing public safety technology. Because they are City employees, they are empowered to act on behalf of the City (to the extent authorized by the POM). The POM has established a standardized reporting structure and management approach, helping to ensure consistency in terms of how each of the core projects is managed.

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[1] As defined by SEARCH, The National Consortium for Justice Information and Statistics
[2] While CAD Next is Mr. Tanner's primary responsibility, he will also be managing the Fire RMS initiative, as it shifts from the concept to procurement stage in the coming period

The QA consultants view the retention of these specific personnel to significantly increase the chances of successfully achieving both the individual (core) project goals, as well as the broader PSSRP goals and objectives.

3.0.1.3   **PSSRP Budget Concern:** In June, the City Council authorized the delayed Versaterm agreement with a "not to exceed" contract value of $7,000,000. Of that amount, approximately $4.3M was allocated for initial costs (with the remainder set aside for maintenance). As noted in the Baseline (5.0.1.2 and 5.0.1.3) and February QA reports (3.0.3.3), the QA Consultants believe the Versaterm costs were higher in Portland than in other, contemporary, similar-sized engagements. Because the contract is now ratified, it is unlikely that the City will witness price reductions from Versaterm (in fact, change orders will likely inflate costs). Therefore, on balance; the concern is centered on the percentage of costs allocated to CAD Next in contrast to the rest of the PSSRP portfolio. Based on the latest budget provided to the QA consultants, the CAD Next budget appears to have a disproportionately high value to the Police Records Management System (RMS) budget (in contrast with the majority of public safety projects with similar size and scope).

This disparity is a concern because, typically, the RMS-related costs of an integrated solution are greater than those allocated to CAD. However, PPDS does not reflect a typical RMS project due to the scope and complexity of the current environment (there are 18 existing subscriber agencies and approximately 25 external entities which rely on PPDS for information). The complexity of the initiative will likely tilt the costs more heavily toward RMS than in a typical CAD/RMS environment.

Recommendation: The PPDS RFP is currently undergoing a final re-scoping exercise. Once the RFP content has been finalized (in terms of functional and technical requirements), the project team should prepare a revised project budget to confirm whether the $4M placeholder is sufficient. Concurrently, the project team should evaluate all PSSRP expenses in an effort to ensure affordability of the core technologies (specifically; ensuring that the project will yield the stated goals and objectives).

3.0.2   CAD Next Observations and Recommendations

3.0.2.1   **Versaterm Contract Ratified on July 3:** After nearly a year of negotiation, the delayed Versaterm agreement was approved unanimously by the City Council on June 10 and signed by Versaterm on July 3. The Council awarded the contract "to

Versaterm, Inc. for replacement of the Computer Aided Dispatch System that supports the Bureau of Emergency Communications not to exceed $7,000,000 (Purchasing Report – RFP No. 107999)". The final contract value does not appear to have been significantly reduced. However, there were some late and beneficial additions to the agreement (related to mobile site licensing) which were introduced by Mrs. Vasquez, who leveraged her extensive experience in dealing with CAD vendors to achieve these improvements. The City is awaiting finalized bonding and insurance certification from Versaterm.

3.0.2.2   **Phase III Implementation Underway:** As planned, the actual Versaterm CAD installation began immediately after the City authorized the agreement on June 10 with a collaborative review of the project's schedule and tasks. It appears that the initially forecast timeline (with CAD going live in April, 2011) has been adopted, although the degree to which cost and/or quality may be affected have yet to be formally presented to the ESC for review. Versaterm and the City have worked on preparing for the initial "implementation session", wherein the baseline software will be presented to City employees for review and configuration. The session is currently scheduled to occur in August.

3.0.2.3   **CAD Next Project Manager Retained:** As stated in Section 3.0.1.2, the City has retained a full time employee who will initially be assigned as the CAD Next Project Manager (Mr. Mark Tanner). In time, Mr. Tanner will also manage the Fire records management system acquisition. Mr. Tanner's three decades of public safety technology experience is substantial. Beyond his line-level Officer experience, he has served four of the nation's largest public safety technology companies with implementing systems throughout the nation (with an emphasis on west coast agencies).

Currently, the CAD Next Phase III Project Charter identifies three people with project management responsibilities, as follows:

Project Manager A: Jim Finch (Consultant)
Project Manager B: Mark Tanner
Project Manager C: Toni Sexton (BOEC Operations Manager)

The specific roles and responsibilities of the Project Manager B are:

– Assists PM-A with those tasks that require City of Portland employee status.
– Reports to the BTS CTO (via PSSRP POM).

- Reviews/contributes to project documentation and status.
- Coordinating with PM-A, directly manages tasks & activities of the BTS Teams, provides presentations/ regular updates to the BTS Project Oversight Committee and the BTS Request Intake Board, as required.
- Secondary focal point for all working documentation passing to/from Contractor(s) from/to City or County personnel (cc'd on all transmittals)
- Member of Project Steering Committee (optional voting member – see PSC, above).

Mr. Finch (Project Manager A) is an employee of ieSolutions (the consulting firm retained by the City to assist with implementing the Versaterm solution), and Toni Sexton (Project Manager C) fulfills her project responsibilities as well as maintaining her role as the BOEC Operations Manager (thus, she is not a full time project resource). Thus, Mr. Tanner will be the sole full-time City of Portland employee assigned to managing the CAD Next initiative.

Recognizing that Mr. Tanner's management of the Fire RMS project will occur in the future (coming months), it is important to define a useful and productive role for him both in the interim, as well as the long-term. Consequently, the POM will be evaluating alternatives for leveraging Mr. Tanner's skill set and experience to the advantage of the organization.

3.0.2.4   **Initial Project Change Order:** The ability to extract information from the dispatch system (often referred to as CAD reporting) from the first day of productive use is a requirement of the system that was added to the scope recently (as the first change order to the agreement with Versaterm). The City and Versaterm are working on identifying the specific scope of the change and the associated level of effort.

3.0.3   PPDS Observations and Recommendations

3.0.3.1   **PPDS RMS RFP:** Mr. Schlesinger has continued with his comprehensive review of the PPDS RMS RFP, focusing on matching business and operational needs with functional and technical RFP requirements. Beyond his own review, he has established a positive review team, comprised of: PSSRP stakeholders, PPB personnel, City Purchasing and Legal, and subscriber agency participants. The review process will likely push the RFP release to September (at the earliest), allowing a full month of review (in August) with City Purchasing and Legal. During an interview with Assistant Chief O'Dea, he noted that it

was more important to "get it right than get it quick". O'Dea's assessment is certainly accurate, given the critical importance of aligning the organization's actual business needs with the stated requirements in the RFP. Given the budget concern expressed in subsection 3.0.1.3, the need for a focused procurement is vital to the health of the broad PSSRP effort.

3.0.3.2 **PPDS Stakeholder Meeting:** On July 16, Mr. Schlesinger facilitated a stakeholder meeting regarding the initiative. With between 70-100 reported attendees from Portland and external agencies, the meeting was the largest of its kind since the project began.

3.0.3.3 **Expanded Project Participation:** PPB is establishing a Project Advisory Committee (PAC) comprised of key stakeholders. In addition, PPB is forming specific Working Groups (to focus on various aspects of the initiative, such as interfaces and subscriber agency-specific requirements). Lastly, Mr. Schlesinger has formed a "Liaison Group" (comprised of representatives from each subscriber and external agency that is associated with the initiative). Beyond being useful in defining requirements, these groups will be instrumental during the installation phase of the RMS. By delegating configuration and training authority to a member of each agency impacted by the new RMS, the bureau will have broader input, less work, and more accurate results.

3.0.4 Radio Observations and Recommendations

3.0.4.1 **Portland Radio Project Manager:** Mr. Karl Larson has been assigned as the Portland Regional Radio Project Manager. Mr. Larson has over 30 years of public safety experience, having served as a Deputy Chief in the region, as well as a communications manager.

3.0.4.2 **Regional Project Manager/Coordinator Selection Underway:** Four proposals for the Regional Project Manager/Coordinator are being evaluated by the Advisory Committee.

3.0.4.3 **Stability Plan Under Development:** The City of Portland is developing an internal plan to ensure a stable, and reliable, radio infrastructure, notwithstanding any external projects. Planned for completion in August, this BTS Radio Group- sponsored effort will thoroughly evaluate the current infrastructure and identify any weaknesses that require correction. This plan has been named the "Stabilization Project" and is on a parallel path to the regional effort.

3.0.4.4   **iXP Contract Delayed**: The City is finalizing the agreement with the Planning Consultant. The target contract completion date is July 29. The Advisory Committee has set August 31 as the kick-off date for iXP to begin the Planning Consultant efforts.

4.0   Prior Recommendations

4.0.1   Prior Recommendation Status

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

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
Baseline 5.0.1.1	The PSSRP requires horizontal vision. Currently, the core projects are operating nearly in a vacuum from one another. Very soon, the organization will begin to suffer from this lack of vision as installation tasks associated with integrating CAD and RMS become apparent and costly. We recommend a comprehensive analysis be undertaken immediately, to identify, triage, and solve, the challenges associated with the present stove-piped approach to the core PSSRP initiatives.	Concept Adopted 12/08: 3.0.1.8 (vi, viii)
Baseline 5.0.1.1	We strongly recommend that the PSSRP Project Charter be rewritten to reflect contemporary scope, budget, timeline, values, objectives, reporting structures, risks and more. It no longer accurately reflects the nature of the initiative.	Concept Adopted 12/08: 3.0.1.4 6/09: This recommendation was re-activated (the Project Chart must be updated to reflect the new governance model).
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 **July 09 Update:** It does not appear that such language was incorporated into the final agreement with Versaterm.
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 **July 09 Update:** The Versaterm agreement was ratified in July. The costs were not significantly reduced.
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. **July 09 Update:** The PPDS Project Manager is conducting a review of the RFP, in alignment with this recommendation.

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.	Initially Declined 12/08: 3.0.3.8 (v) Rather than retaining a consultant, the city is attempting to retain a full time employee. Accepted 5/09: A full time Project Manager started on May 28.
Baseline 5.0.1.3 Restated 3/09 3.0.3.3	The PPDS project needs a Project Charter that reflects (at the absolute minimum) a basic and accurate budget, detailed timeline, and comprehensive scope statement.	Concept Adopted 12/08: 3.0.3.5 6/09: This recommendation was re-activated as part of the governance reform. The new PPDS Project Manager should create a contemporary Project Charter.
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 Enacted 6/09
Baseline 5.0.1.5	With regard to any core PSSRP initiative, the ESC should assign control of that resource to the POM (whether it be contractor or full time employee).	Concept Adopted 12/08: 3.0.1.8 Enacted 6/09
Baseline 5.0.1.6	The PSSRP requires the backing of a senior Executive Sponsor (perhaps an elected official) who holds the authority to recognize the PSSRP initiative as a mission critical, high priority, endeavor. The ESC should identify such a person, who would act as the project's advocate whenever necessary, to place focus and prioritization on project tasks.	Concept Adopted 12/08: 3.0.1.3 Enacted 6/09
Baseline 5.0.1.6	To the degree that it is feasible, the ESC should determine the best method for raising the salaries for the core PSSRP Project Managers, as well as the POM to an amount more in line with contemporary market demand. Naturally, this would require additional financial resources to be allocated into the budget. However, failing to make change in this area will cost far more in lost project momentum, and potentially a failed project state.	Concept Adopted 12/08: 3.0.1.5 Enacted 1/09 Employees Hired 6-7/09
Baseline 5.0.1.7	The City retain a public safety technology business process analysis consultant immediately. With the CAD installation set to begin in less than 90 days, we suggest that the consultant be retained through a sole source contract, as an exigent circumstance requirement. The scope of services would document the baseline business processes that are, or could be, impacted by technology. This methodology would provide a structured approach for developing a baseline business process "snapshot" of the current environments to confirm or reject various assumptions about the business environments (not to conduct detailed business process mapping).	Concept Adopted 12/08: 3.0.1.8 (viii) Enacted 4/09
12/08 3.0.1.7	When the Versaterm contract is signed, and the PPDS RFP is released, the POM should document the known intersections, and prepare a migration plan accordingly.	**July 09 Update:** Underway.

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
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. **July 09 Update:** While the ESC adopted the concept, the four options were not presented to the ESC. The project is underway with a Spring/2011 target cutover, although the ESC does not have a clear understanding of any potential quality/cost sacrifices.
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. **July 09 Update:** The project's key stakeholders adopted the Olympic Performance report recommendations during the period.
2/09 3.0.2.1	(a) BOEC should consider extending the forecast contract completion date to allow for a 6-8 week process. (b) The City should consider creating a written contract development plan. (c) The ESC should give consideration to videotaping (or audio taping) the contract development session (as many large public safety agencies have adopted this practice in recent years).	(a) N/A (b) Not written, but strategized. (c) Not enacted.
2/09 3.0.3.2	PPB should confirm that each Partner Agency has a clear expectation of what the new PPDS RMS will offer in terms of modules and features.	Adopted 3/09
3/09 3.0.2.1	The City (should) set a "date certain" for contract finalization of April 3 (two full weeks prior to the actual deadline), with weekly contract checkpoint meetings (to reinforce urgency, and prevent procrastination). The City should immediately communicate to Versaterm the consequences of failing to reach an agreement in time.	Recommendation rendered inactive when agreement was not reached after April 3.

Recommendation Location	Recommendation Summary	Action Taken (QA Report, and Subsection)
3/09 3.0.3.3	Developing the PPDS replacement project budget is an urgent, critical recommendation that should be undertaken immediately. The QA consultants have a very low level of confidence in the current ROM forecast.	Adopted 4/09
4/09 3.0.1.2	The May ESC Meeting should be held, regardless of the status of the ESC reform efforts.	Adopted 4/09
4/09 3.0.2.2	Recognizing that the Versaterm agreement was not ratified by the April 20 deadline, BOEC should recalibrate the Phase III timeline (and associated planning materials) to reflect the early Fall/2009 start date described by Director Turley. Additionally, the ESC should direct the POM to craft a contract finalization schedule which reflects a Summer/2009 completion date (with elected official approval at least one month prior to the project kickoff).	The Phase III implementation timeline continues to reflect a Spring, 2011 completion date.
5/09 3.0.2.2	The ESC should review the merits, limitations, risks and issues associated with the Phase III timeline compression and evaluate whether the various implementation alternatives may impact the remaining PSSRP initiatives.	The issue was raised during the May ESC Meeting. However, no action was taken. The ESC members continue to request information on the CAD Next implementation alternatives. **July 09 Update:** Updated materials have not been provided to the ESC yet.
6/09 3.0.1.2	Following the June ESC meeting, the POM should revise the PSSRP Project Charter to align with the many structural changes associated with the final governance reform.	7/09: Underway.
6/09 3.0.2.3	Following the June ESC meeting, ieSolutions should revise the Phase III Project Charter to align with the many structural changes associated with the final governance reform. Additionally, the Project Charter should include (at a minimum) the project's budget, timeline, methodology and risks.	7/09: Underway.
6/09 3.0.3.1	Following the June ESC meeting, PPB should revise the PPDS Project Charter to align with the many structural changes associated with the final governance reform. Additionally, the Project Charter should include (at a minimum) the project's budget, timeline, methodology and risks.	7/09: Underway.