# City of Portland PSSRP Initiative Monthly Quality Assurance Report For the Period: 06.15.10 – 8.15.10

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# TABLE OF CONTENTS

1.0 REPORT PURPOSE AND METHODOLOGY.....2
2.0 PSSRP PROJECT ASSESSMENT.....4
3.0 OBSERVATIONS AND RECOMMENDATIONS.....9
4.0 QA RECOMMENDATION REPORT .....13

# 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 July 1, 2010 and August 15, 2010. The reporting period was extended by the consultants[1].

## 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 | 8/15/10 | Cit Com, Inc | Report Author | All |
| v 1.0 | 8/16/10 | SEARCH | Consultant/Advisor | All |
| v 1.1 | 9/01/10 | POM/ESC | Project Management/Governance | 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 (both by telephone and/or onsite interviews held on July 29):

| Interview Participant | Date |
|---|---|
| Lisa Vasquez | Bi-Weekly + Formal: 07-29-10 |
| Lisa Turley | 08-11-10 |
| John Klum | 08-05-10 |
| Mark Greinke | 08-05-10 |
| Larry O'Dea | (on vacation through 8/18) |
| Diana Rogero | 07-29-10 |
| Karl Larson | 07-29-10 |
| Jerry Schlesinger | 07-29-10 |
| Mark Tanner | 07-29-10 |
| Robin Hamblet | 07-29-10 |
| Howie Weiner | 07-29-10 |
| Dylan Long | 07-29-10 |
| Andrew Carlstrom | 07-29-10 |
| Lana MacArthur | 08-13-10 |

[1] The report author was on bereavement leave during the period.

**Project Materials Reviewed During the Period**

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

**Weekly Project Status Reports**

- **CAD Next:** 7/6, 7/20 (included 7/13), 7/27, 8/3, 8/10, 8/17
- **RegJIN:** 7/6, 7/13, 7/20, 7/27, 8/3, 8/10, 8/17
- **Fire RMS:** 7/7, 7/13, 7/20, 8/3, 8/9, 8/24 (included 8/16)
- **Radio:** 7/6, 7/14, 7/20, 7/27, 8/17 (included prior period updates)

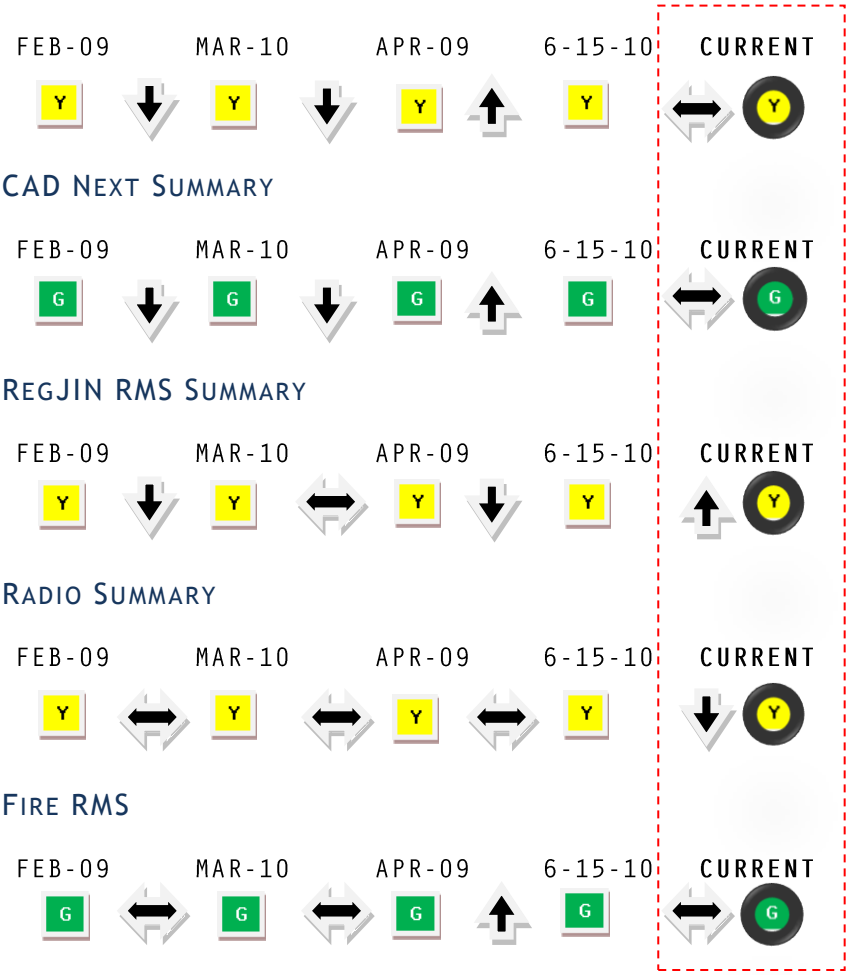
**Other Related Documents Reviewed During the Period**

- Final PSSRP Global Charter and Governance Models
- Fire RMS Project Planning Documents
- RegJIN Project Milestones
- ESC Meeting Minutes (6-15)

# 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:**

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**<br>Reflects status of overall portfolio | Y | ⬌ | Y | ▪ The Global PSSRP Project Plan, and associated governance model, was adopted in July.<br>▪ The PSSRP project team, in concert with Commissioner Leonard, crafted a general election resolution to secure $72M in General Obligation bonds to "provide funding for the replacement of aging fire and emergency response vehicles, to finance the construction of a fire station and an emergency response center, and provide funding for a public safety emergency radio system".<br><br>**(See Section 3.0.1 for detailed Global PSSRP Observations)** |
| **CAD Next Project Summary** | G | ⬌ | G | ▪ The CAD Next project team is preparing for Performance Testing in late September.<br>▪ ieSolutions has completed the functional acceptance test scripts development. To date, the preliminary testing has identified approximately 229 defects, with the majority corrected.<br><br>**(See Section 3.0.2 for detailed CAD Next Observations)** |
| **RegJIN Project Summary** | Y | ⬇ | Y | ▪ During the period, the RegJIN executive sponsorship changed. Police Chief Reese has replaced Assistant Chief O'Dea as the designated ESC Member (representing the Police Bureau). Also, the Director of Police Services (Mike Kuykendall) will be attending the bimonthly ESC meetings, as well as directing the ongoing bureau-level activities.<br>▪ The RegJIN RFP resulted in three qualified proposals (from Motorola, Tiburon and Unisys).<br><br>**(See Section 3.0.3 for detailed RegJIN Observations)** |

| PSSRP Evaluation Metrics | Prior Rating | Change Direction | Current Rating | Comments |
|---|---|---|---|---|
| **Radio Project Summary** | Y | ↓ | Y | ▪ During the period, Mr. Dave Brooks (BTS Radio Engineering Manager) resigned, representing a significant loss of knowledge regarding the existing and future voice radio infrastructure. The City retained Adcomm Engineering (an established public safety radio communications firm) to assist with resolving technical issues which may arise while a permanent replacement is sought. The City assigned Mr. Scott Howe to the position on an interim basis.<br><br>**(See Section 3.0.4 for detailed Radio Project Observations)** |
| **Fire RMS Summary** | G | ↔ | G | ▪ The project team has developed a draft report of their findings, and plans on presenting it to Fire Chief Klum by the end of September. Chief Klum will evaluate the alternatives and render a decision in October.<br><br>**(See Section 3.0.5 for detailed Fire RMS Observations)** |

### 2.0.3 Project Change Assessment Detail

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

#### 2.0.3.1. PSSRP Global Changes (applies to entire portfolio)

No significant metrics changed during the period.

#### 2.0.3.2. CAD Next Change

No significant metrics changed during the period.

#### 2.0.3.3. RegJIN Change

| | | | | |
|---|---|---|---|---|
| 2. Is Executive Sponsorship in place? | G (Yes) | ↑ | G (Yes) | ▪ Ordinarily, a transition in executive sponsorship would trigger an automatic shift in this category (to monitor the transition and knowledge transfer). However, the loss is offset by Police Chief Reese's decision to assign himself to the ESC (in addition to his Director of Police Services). |
| 23. Is the Executive Sponsorship the same as when the project started? | Y (No) | ↓ | R (More than 1 Change) | ▪ The original Executive Sponsor was AC Martinek, followed by AC O'Dea, and now Chief Reese. As noted above, the infusion of the Chief compensates for the change. |

#### 2.0.3.4. 800 MHz Regional Radio Change

| | | | | |
|---|---|---|---|---|
| 21. Has there been a loss of trained key project management resources? | G (<5%) | ↓ | R (>10%) | ▪ Dave Brooks (BTS Radio Engineering Manager) resigned during the period, representing a significant stakeholder loss. QA estimates the loss to be greater than 10% of the project team's radio resources. However, the City has retained a third party engineering firm, and assigned an interim Manager. Therefore, the overall metric remained yellow, or on caution. |

#### 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 Global Project Plan and Governance Adopted

Following a sixth revision, the Global PSSRP Project Plan, and associated governance model, were adopted in July.

### 3.0.1.2 General Obligation Bonds on November Ballot

The PSSRP project team, in concert with Commissioner Leonard, crafted a general election resolution to secure $72M in General Obligation bonds to "provide funding for the replacement of aging fire and emergency response vehicles, to finance the construction of a fire station and an emergency response center, and provide funding for a public safety emergency radio system". The measure will be on the November 2, 2010 ballot.

### 3.0.1.3 Integration Architect Position Filled

During the period, Mr. Weiner was appointed to the position of Integration Architect, leaving a single open project team position (System Architect).

### 3.0.1.4 Project.net Pilot Deployment

The POM is overseeing the deployment of an open-source, web-based project management tool called project.net. The online project management resource simplifies tasks for Project Managers, and allows stakeholders to access information that is pertinent to their interests.

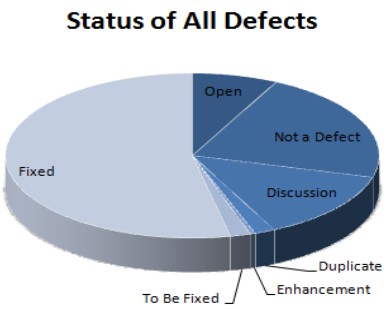
## 3.0.2 CAD Next Observations and Recommendations

### 3.0.2.1. Performance Testing To Begin in Late September

The project team is creating a performance test plan to examine the performance of the Versadex CAD (the performance generally refers to "how quickly" the application is able to execute various commands, inquiries, and services). To conduct an accurate performance test, a variety of decisions must be made by both the project team and Versaterm, including: What is a reasonable mixture of background transactions to use during the testing period? What tool, or tools, should be used during the performance test (i.e., LoadRunner: A tool that simulates various load conditions, enabling a more realistic test environment)? How

will the results of the test be interpreted and used by the project team? At the time this report was written, these issues were being resolved, and the project team estimated testing to begin in late September (within predicted schedule parameters).

#### 3.0.2.2. Functional Acceptance Testing




ieSolutions completed the functional acceptance test scripts development. Formal testing, based on the scripts, began during the period. Thus far, 229 software defects have been identified, with the majority (122) having been corrected. The CAD Next functional testing approach continues to track ahead of schedule.

### 3.0.3 RegJIN Observations and Recommendations

#### 3.0.3.1 Executive Sponsorship Transition

During the period, the RegJIN executive sponsorship changed. Police Chief Reese has replaced Assistant Chief O'Dea as the designated ESC Member (representing the Police Bureau). Also, the Director of Police Services (Mike Kuykendall) will be attending the bimonthly ESC meetings, as well as directing the ongoing bureau-level activities.

Although any leadership transition weakens the short-term health of an initiative, the Police Chief's decision to directly participate in PSSRP far outweighs any transitional detriments. Executive Sponsorship is often viewed as the most important factor which contributes to successful law enforcement technology initiatives.

#### 3.0.3.2 RegJIN RFP Responses

Three qualified vendors responded to the RegJIN request for proposal (RFP): Motorola, Tiburon and Unisys[2]. The evaluation and selection team (comprised of 30 participants and 3 alternates) was preparing to assemble their first meeting while the QA consultants were onsite conducting interviews (the meeting was held on August 4).

[2] Versaterm, the CAD Next vendor, did not submit a proposal.

Both Motorola and Tiburon are established "Tier 1[3]" vendors in the law enforcement records management industry. Unisys, acting a prime contractor (or system integrator), is a global system integrator, with ample experience in designing complex law enforcement technology solutions. Unisys has proposed a Denali records management system.

The evaluation and selection will require several months of analysis, with a finalist vendor to be identified in early 2011.

### 3.0.4 Regional Radio Project

#### 3.0.4.1. Loss of Key Resource

During the period, Mr. Dave Brooks (BTS Radio Engineering Manager) resigned, representing a significant loss of knowledge regarding the existing and future voice radio infrastructure. The City retained Adcomm Engineering (an established public safety radio communications firm) to assist with resolving technical issues which may arise while a permanent replacement is sought. The City assigned Mr. Scott Howe to the position on an interim basis.

#### 3.0.4.2. City Radio Stability Plan Update

Following onsite training (on the new Motorola controllers and equipment) in late July, the project team will attend the equipment staging in Schaumburg, IL, during the week of September 6.

The team continues to evaluate the transitional interface between the existing CAD and the new radio controllers. The interface is anticipated to provide approximately five months of service, between 12/1/10 (when the new Motorola controllers go live) and 4/3/11 (when the Versadex CAD is scheduled to cut over, replacing the existing Northrop Grumman CAD). The team is currently testing the interface, and has reported positive results, tempered with caution as the interface is not yet complete.

#### 3.0.4.3. Regional Radio Update

During their July 22 meeting, the Regional Advisory Board received a six month extension for spending the Public Safety Interoperable Communications (PSIC) Grant funds.

[3] There are three 'tiers' of public safety vendor classification (where Tier 1 includes the largest companies, and Tier 3 includes the smallest, or regional, companies).

At the Partnership's direction, iXP subcontracted legal services (associated with the exploration of forming an Emergency Communications District) to Clark Balfour, and the firm was introduced during the July meeting.

## 3.0.5 Fire RMS

### 3.0.5.1. FIRE RMS Technology Procurement Update

During the period, the project team continued to evaluate the two technical solutions for Fire RMS: 1) Acquiring an "off the shelf" Fire RMS product, and 2) Selecting an "open source" solution provider. The Site Committee facilitated a second demonstration of an off the shelf solution named FDM, while the project team conducted in-depth analysis of the open source solution.

The project team has developed a draft report of their findings, and plans on presenting it to Fire Chief Klum by the end of September. Chief Klum will evaluate the alternatives and render a decision in October.

### 3.0.5.2. Zetron Fire Station Alerting

During the period, Diana Rogero was formally assigned to manage the fire station alerting initiative (commonly referred to as "Zetron", which is the name of the company that provides the fire alerting system), with Dylan Long assigned as the Project Coordinator.

# 4.0 QA Recommendation Report

## 4.0.1 QA Recommendation Report (Updated August 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 |
|---|---|---|---|---|---|---|---|
| 2 | Baseline 5.0.1.1 | We strongly recommend that the PSSRP Project Charter be rewritten to reflect contemporary scope, budget, timeline, values, objectives, reporting structures, risks and more. It no longer accurately reflects the nature of the initiative. | Concept Adopted | 7/10: Closed with final adoption of Global PSSRP Project Plan and Governance | POM/ESC | 7/15/10 | 7/7/10 |
| 38 | 9/09 3.0.1.3 | The Olympic Performance report provided much-needed reform, but was not intended to substitute for a global PSSRP Project Charter (Project Plan) and should not be relied upon for such purposes. In addition to the recommendations from the prior period on this subject, the QA Consultants also recommend that the POM construct a revised issue management process that is efficient and thorough. Decisions which may impact the POM should be assigned to a neutral, third party, for analysis with recommendations left to the ESC. | More Information Required | 7/10: Closed with final adoption of Global PSSRP Project Plan and Governance | POM/ESC | 7/15/10 | 7/7/10 |

| ID | RECOMMENDATION LOCATION | SUMMARY OF RECOMMENDATION | ACTION TAKEN | STATUS OF ACTION | ASSIGNED TO | DUE BY | COMPLETE DATE |
|---|---|---|---|---|---|---|---|
| 43 | 10/27/09<br>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) | 05/10: POM developed RFP to obtain technical analysis vendor.<br><br>06/10: POM has received the first of two technical readiness evaluations / certifications requested 1. AIX Installation & Configuration 2. Public Safety Network Architecture. RFP for Network evaluation undergoing final edits prior to publication. | POM | 7/1/10 | In Progress |

| ID | RECOMMENDATION LOCATION | SUMMARY OF RECOMMENDATION | ACTION TAKEN | STATUS OF ACTION | ASSIGNED TO | DUE BY | COMPLETE DATE |
|---|---|---|---|---|---|---|---|
| 44 | 10/27/09 3.0.1.3. | The QA Consultants strongly urge the ESC to meet, as soon as practical, for a facilitated review of the committee's reach, authority, and power. The meeting should address the following subjects: a) Determining whether the seven responsibilities (Design approvals, Go-live approvals, Scope changes, Conflict or significant interaction between projects, Budget recommendations to Council, Resource needs, and Policy issues) defined in the Olympic Performance report are valid and represent the breadth of topics subject to ESC controls, b) Identifying additional responsibilities, and c) Documenting specific thresholds within each defined category that warrant ESC review, approval or other formal action (by vote). Additionally, the Olympic Performance report recommended that an agenda and accompanying decision package be distributed to the ESC members one week prior to the quarterly meetings. The Olympic Performance report suggested that these decision packages would be prepared by the POM. However, during the September ESC Meeting, no such packages were created or delivered prior to the meeting date. The level of effort necessary to prepare such a decision package will vary, based on the complexity of the issue. Similarly, the POM's availability to prepare agenda packages will also vary (based on the constantly shifting workload). The QA Consultants recommend that the POM identify alternative human resources to prepare the quarterly ESC agenda and decision packages. Indeed, several ESC members felt that one week was insufficient time to adequately prepare for debating and rendering important decisions, requesting a month of lead-time instead. Recognizing that the people who comprise the ESC have diverse backgrounds (and exposure to public safety technology), the QA Consultants recommend that the agenda packages be created and distributed one month prior to the scheduled meeting (for non-exigent matters, which will have to be brought forth by the POM, as an exception). The conservative lead time will ensure that all ESC members have adequate time to prepare for the meetings. | Concept Adopted | 7/10: Closed with final adoption of Global PSSRP Project Plan and Governance | POM/ESC | 7/15/10 | 7/7/10 |

| 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 | 06/10: 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.<br><br>08/10: POM is crafting a Sustainment Report for CAD Next. | POM, MA | 9/15/10 | 11/1/10 (estimate by QA) |