PSSRP
QUALITY ASSURANCE
REPORT

AUGUST, 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 five[1] PSSRP projects.

GLOBAL

Andrew Carlstrom was appointed to the permanent position of PSSRP Project Office Manager (POM) on July 12, assuming responsibility for managing, directing and coordinating the PSSRP initiatives.

Project leadership change negatively impacts the overall health of the portfolio during the transition period. Typically, the most immediate risk pertains to the loss of institutional knowledge. However, that risk is minimized by Mr. Carlstrom's tenure with the City of Portland and his service to the PSSRP initiative since early 2010. The remaining transition risks pertain to the following four key project management areas:

- Understanding Project Complexities
- Identifying Project Interdependencies
- Financial and Human Resource Management
- Enabling Effective Change Management

Leadership change also affords an opportunity for the POM to leverage his unique skills and talent. During the period, the POM announced plans to improve the portfolio's horizontal outreach (between bureaus, as well as between the city and external partners) and change management (accommodating the business and organizational impact).

The ESC has resumed a monthly meeting schedule, which allows for faster discussion and decision-making. The meeting agenda has been reformatted to more closely align with the charter (with an increase in the use of decision packages and voting opportunities). Additionally, the quality assurance segment of the agenda has been moved to the first order of business.

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[1] To improve report readability, and to better align the quality assurance methodology with Project Management Institute (PMI) standards, PSSRP will no longer be evaluated as an individual project.

CAD NEXT

July   **August**

YELLOW   YELLOW

BOEC, BTS, and Versaterm have collaboratively reduced the number of outstanding defects and issues during the period, according to key stakeholders and the Police Advisory Team.

With BOEC and BTS now fully engaged in product sustainment, the remaining project tasks will focus on defect/issue mitigation and final project closeout. Product acceptance requires BOEC and BTS authorization. QA recommends that priority defects or issues be resolved prior to final acceptance, or as part of conditional acceptance.

REGJIN

July   **August**

YELLOW   RED

As the project team continued negotiating the RegJIN agreement with Unisys, the ESC considered the impact of Intergraph's April 19 asset-acquisition of Denali, focusing on the following two issues:

1. How will the integration of Denali's InPursuit RMS with Intergraph's current I/LEADS[2] RMS affect the resulting product's functionality, performance and reliability both in the short term, and during the product's lifecycle?

2. Recognizing that Intergraph is a large public safety software company, with decades of experience in providing multi-jurisdictional RMS solutions without a Prime Contractor; has the introduction of Intergraph impacted the need for a Prime Contractor (Unisys)?

The project's color-code was changed from yellow to red during the period because four metrics declined (two pertained to schedule delays, one pertained to the costs exceeding the charter budget, and one pertained to the negative impact of unresolved issues).

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[2] Intergraph/Law Enforcement Automated Data Systems (I/LEADS)

RADIO

July   August

YELLOW   GREEN

Over the past three years, three radio-related initiatives have emerged: 1) The Regional Radio Project, 2) The Portland Stability Plan, and 3) The Emergency Radio Replacement Project. With the regional initiative winding-down (the majority of forecast deliverables are complete), and the Portland Stability Plan largely concluded[3]; the Emergency Radio Replacement Project is poised to govern the City's public safety communication plans for the next decade.

During the period, the project team finalized the Project Charter and Governance, and identified a finalist radio engineering consultant.

In the past, the three radio projects were monitored in monthly QA reports as discrete initiatives. Future QA reports will primarily focus on the Emergency Radio Replacement Project, with updates (as relevant) on the Regional Radio project.

FIRE RMS

July   August

YELLOW   GREEN

The FIS Replatform Project Charter and Governance document were approved by PSSRP and Chief Klum during the period. A Project Advisory Committee (PAC) was formed, and will be meeting monthly. The project team selected the project consultant, and expects to have an agreement in place by September 1. The consultant will be responsible for creating a detailed project plan and schedule.

ZETRON

July   August

RED   YELLOW

PSSRP facilitated a Zetron-specific meeting on August 9 with PF&R, BTS and BOEC representatives in attendance. The attendees collaboratively identified existing defects and issues, and created a task force to address them.

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[3] The project team is working on concluding the final elements, including a software upgrade (that was delayed until after Versadex went live), and digital encryption for police radios

Individual Project Assessments

CAD NEXT   **OBSERVATIONS**

With BOEC and BTS now fully engaged in product sustainment (as of July 1), the remaining project tasks will focus on defect/issue mitigation and final project acceptance[4]. The CAD is currently undergoing a rigorous 30-day reliability and performance test, which is scheduled to conclude on August 25. If the CAD passes the test, Versaterm will submit a final system acceptance request.

Globally, the number of outstanding defects and issues has significantly declined during the current period. The Police Advisory Team continued their weekly meetings to review outstanding defects and issues. During the consultant's interviews (on August 5), nine priority issues remained:

1. **No Radius Search for Nearby Calls:** This feature provides responding units with prior police/fire contact with addresses nearby the current call-for-service location. Presently, the CAD is only providing information on the specific address (not nearby addresses). The CAD Next RFP included the following requirement (9.0.6):

   "The system shall provide the ability to search premise information records within a default user-defined radius around a given location by premise information type. User-defined radius shall be defined by class of service (Police / Fire / EMS)."

2. **Aging Unit GPS Coordinates:** Currently, the CAD system depicts the last-known geographic location of a field unit. However, when field units get out of their vehicle or move to a different location (perhaps in a different vehicle), the CAD continues to show them as being in their last-known geographic location.

3. **Difficulty Reading Call Updates:** Field units find the call remarks/updates in the chronological detail section of an active call to be unreadable because each update appears in a unique background color/shade.

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[4] In the PSSRP Project Charter, final project acceptance occurs upon BOEC, BTS and PSSRP signing an acceptance certificate. However, during the August ESC Meeting, the POM announced that PSSPR would no longer be a signatory on the final acceptance document.

4. **Status Screen Layout:** Field units find the status screen real-estate to be crowded, making it difficult to find relevant information.

5. **Specialty Unit Monitoring:** Certain specialty units (Transit Police, School Police, Tactical Operations, and Explosives Disposal) do not appear within their originating district, making it impossible for their respective supervisors to use the CAD to monitor the unit's activity.

6. **Cumbersome Process for Self-Dispatching:** Self-dispatching requires between 5 to 7 actions for field units.

7. **Messaging View Limitation:** Messages from other units do not include the sender's name or unit.

8. **Browser Status Screen Sorting Limitations:** Field units want the ability to limit the number of units that appear on their status screen (to include, for example; only sworn units) to make it easier to read.

9. **Command-Line Radio Check:** The field units want the ability to run a command-line inquiry that informs them which radio net a particular field unit is currently assigned.

While all of the issues are important to the end-users, the first three pertain to the safety of field units. Therefore, these three issues are of particular concern, and should be given the highest priority attention.

Also during the period, BOEC, BTS and Versaterm continued to investigate the technical issues which are causing the fire mobile devices to suffer from poor wireless modem connectivity. As of August 5, the specific cause and correction had yet to be determined.

Lastly, the Versaterm User Group Conference will occur in the following reporting period. Portland is sending representatives to attend the conference, and actively participate in driving Versadex product direction (by collaborating with fellow large-scale Versadex clients, the City can maximize their leverage).

RECOMMENDATIONS
Since the November (2010) functional, performance and reliability testing process; the QA consultants have recommended that the City not accept the Versaterm product until all identified priority

defects and/or issues have been resolved. During this final phase of testing, the consultants continue to recommend that the city not accept the product until all priority issues have been resolved[5].

Recognizing that Versaterm's response to the City's RFP requirements is an attachment to the final Agreement, the QA consultants recommend the project team review Versaterm's response to the RFP (specifically to locate any requirements which pertain to outstanding priority defects, such as the radius search defect, and correlated RFP requirement 9.0.6). If Versaterm complied with such requirements, the QA consultants recommend the City withhold acceptance until the requirement has been met by Versaterm.

During the August ESC Meeting, the City Attorney mentioned that the City's Agreement with Versaterm may include a "conditional acceptance" clause, which would allow the City to conditionally accept the Versaterm solution, pending the correction of outstanding (and mutually agreed-upon) defects and issues. The QA consultants recommend that the project team confirm the presence of such language, and evaluate whether a conditional acceptance is appropriate.

REGJIN **OBSERVATIONS**

During the period, the City entered the fourth month of contract negotiations with Unisys. The City evaluated contractual changes requested by Unisys (in the form of red-lined edits to the agreement), while the project team focused on refining the statement of work (including partner agency considerations, interface control documentation, and technical infrastructure roles and responsibilities).

Also during the period, the City sought additional information from Unisys regarding Intergraph's asset-acquisition of Denali. The City's Purchasing and Legal representatives spoke with Unisys, Denali and Intergraph employees. Ultimately, concerns regarding the legal relationship between the parties were resolved to the satisfaction of the City.

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[5] Resolved meaning that either Versaterm has corrected the problem, or the City and Versaterm have reached a written, mutually agreeable, plan for mitigation

The City also sought to learn how the integration of Denali's InPursuit RMS[6] with Intergraph's current I/LEADS[7] RMS would affect the resulting product's functionality, performance and reliability both in the short term, and during the product's lifecycle. Concern over this topic has emerged from Intergraph's statement[8]: "Intergraph will bring together the best of existing Intergraph and Denali RMS products and new advancements into one world-class, web-based solutions suite". According to Unisys; while Intergraph and Denali have partnered on previous public safety technology engagements, the two companies have not previously integrated their products, nor do they have a published timeline for such integration.

A secondary issue emerged during the period regarding the role of Unisys in the RegJIN initiative. Recognizing that Intergraph is a large public safety software company, with decades of experience in providing multi-jurisdictional RMS solutions without a Prime Contractor; some ESC members have begun to question whether the introduction of Intergraph (vis-à-vis their asset-acquisition of Denali) has diminished the need for a Prime Contractor.

The RegJIN project schedule milestone for contract development completion was delayed during the period from October, 2011 to December, 2011. This is the second delay in the contract development schedule (which was originally forecast to conclude in May, 2011). The subsequent project milestones (concluding with golive) shifted accordingly, with project conclusion now forecast for August, 2013.

The schedule delay introduces risk associated with maintaining the current Portland Police Data System (PPDS). Currently, the City has plans to support PPDS through June, 2013. PPDS is an application that resides on the City's mainframe, and is supported by two employees. The application is similarly supported by two employees.

The draft RegJIN Intergovernmental Agreement (IGA) is complete, and is presently under review with the City Attorney's Office.

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[6] Records Management System
[7] Intergraph/Law Enforcement Automated Data Systems (I/LEADS)
[8] In an April 19 press release, and as posted on Intergraph's website

RECOMMENDATIONS

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).

RADIO **OBSERVATIONS**

Over the past three years, three radio-related initiatives have emerged: 1) The Regional Radio Project, 2) The Portland Stability Plan, and 3) The Emergency Radio Replacement Project. With the regional initiative winding-down (the majority of forecast deliverables are complete), and the Portland Stability Plan largely concluded[9]; the Emergency Radio Replacement Project is poised to govern the City's public safety communication plans for the next decade.

During the period, the project team finalized the Project Charter and Governance, and identified a finalist radio engineering consultant. The Emergency Radio Replacement Project remains in the initial planning stages, awaiting input from the chosen radio engineering expert.

RECOMMENDATIONS

In the past, the three radio projects were monitored in monthly QA reports as discrete initiatives. QA recommends Future QA reports will primarily focus on the Emergency Radio Replacement Project, with updates (as relevant) on the Regional Radio project.

FIRE RMS **OBSERVATIONS**

The FIS Replatform Project Charter and Governance documentation was approved by PSSRP and Fire Chief Klum during the period. A Project Advisory Committee (PAC) was formed, with participants from PF&R, BTS, and OMF. The PAC

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[9] The project team is working on concluding the final elements, including a software upgrade (that was delayed until after Versadex went live), and digital encryption for police radios

will meet on a monthly basis. The project team selected a project consultant, and expects to have an agreement in place by September 1. The consultant will be responsible for creating a detailed project plan and schedule.

ZETRON   **OBSERVATIONS**

BTS facilitated a Zetron-specific meeting on August 9 with PF&R, PSSRP and BOEC representatives in attendance. The purpose of the meeting was to review the outstanding defects and issues associated with Zetron from a multi-bureau perspective. The meeting resulted in a Zetron Task Force being created to mitigate the technical and functional defects and issues. Additionally, the team clarified the support roles and responsibilities. QA will re-evaluate Zetron during the September period to report on progress made against the outstanding defects and issues.

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   No changes during the period.

The project is at risk of being downgraded if the following two metrics are not updated in the following period:

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?

REGJIN   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?
(High Impact)

Recommendation: The contract development milestone is the cause of the broader schedule delays. QA recommends the Project Manager interview the key contract development stakeholders to create a revised contract development target date. QA also recommends that the project schedule include any tasks which emerge from the PPDS risk analysis. Once identified, the forecasted end-of-life date for PPDS should be reflected in the project schedule as an immovable project barrier. Ultimately, the revised project schedule should be reviewed and approved by the ESC (to move the project back into yellow or green status).

RADIO   Metric 4: Does a complete and current project plan exist in writing?
(Yes)

Metric 20: Has an experienced project manager been assigned to the project?
(Yes)

FIRE RMS   Metric 4: Does a complete and current project plan exist in writing?
(Yes)

Metric 20: Has an experienced project manager been assigned to the project?
(Yes)

ZETRON   Metric 43: Will the project meet the expected business objectives?
(Task Force formed on August 9 to clarify objectives and work toward achieving them)

How we produce the report

PERIOD COVERED This report is intended to communicate the results of the independent quality assurance (QA) company's[10] review of the PSSRP initiative to the City of Portland's Executive Steering Committee (ESC) for the period between June 23, 2011[11] and August 15, 2011.

INFORMATION SOURCES The consultants communicated with the following people prior to developing the report:

Aaron Johnson	John Klum
Andrew Carlstrom	Kalei Taylor
Carmen Merlo	Karl Larson
Diana Rogero	Lisa Turley
Dorothy Brown	Louise Grant
Dylan Long	Mark Greinke
Garrett Dow	Mark Schmidt
Jack Graham	Mark Tanner
Jerry Schlesinger	Mike Reese
	Toni Sexton

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

Project Status Reports
CAD Next: N/A
RegJIN: 6/22, 6/29, 7/6, 7/13, 7/22, 7/29, 8/5
Radio: 6/28, 7/18, 7/25, 8/8
Fire RMS: 6/24, 7/1, 7/8, 7/15, 7/22, 7/29, 8/5
Zetron: N/A

Other Project-Related Documents
RegJIN PAC Newsletter
May 23, 2011Letter from Unisys to Estelle Bollinger
Police Advisory Committee's Consolidated Enhancement and Issues Request List
Police Advisory Team BOEC/VCAD 07-28-11Meeting Minutes
August 16 ESC Meeting Documentation

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[10] Cit Com, Inc
[11] The previously-submitted QA report was last updated on July 26

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 August 16 ESC Meeting, the members clarified that, historically, PSSRP fell under OMF. However, Chief Klum pointed out that the organizational structure changed in 2010, when Mayor Adams modified the portfolio (placing PSSRP under Commissioner Leonard).	Carlstrom	Report back by 9/22	N/A
61	03/15/11 3.0.2.1	The QA Consultants continue to recommend that the City require Versaterm to correct all defects revealed during the functional testing process prior to accepting the solution, in accordance with the agreement (Recommendation 51, from November, 2010 report).	Discussed/Under Evaluation	During the August ESC Meeting, the Committee discussed examples of the Police Advisory Team's priority defects and issues. Director Turley noted that most of the outstanding issues are not classified as "defects" (classification requires agreement on	Turley	Report by 9/22	N/A

ID	RECOMMENDATION LOCATION	SUMMARY OF RECOMMENDATION	ACTION TAKEN	STATUS OF ACTION	ASSIGNED TO	DUE BY	COMPLETE DATE
				the part of the city and Versaterm), but that workarounds or software modifications are being developed. City Legal noted that the CAD Next Agreement should have a "Conditional Acceptance" clause, which would enable BOEC/BTS to accept the solution, pending the correction of identifiable defects/issues.			
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	Recommendation discussed during July ESC Meeting. PSSRP Chair advised that the PSSRP Director is working on it. No due-date was identified (project planning documents note that the lessons-learned report should be finalized within three months of cutover). During the period, Tanner prepared the methodology.	Carlstrom, Tanner	7/17 (revised date TBD)	Pending

ID	RECOMMENDATION LOCATION	SUMMARY OF RECOMMENDATION	ACTION TAKEN	STATUS OF ACTION	ASSIGNED TO	DUE BY	COMPLETE DATE
65	05/16/11 3.0.3.1	The Intergraph acquisition of Denali Solutions occurred after the City identified Unisys/Denali as the finalist, but prior to successfully negotiating an agreement. This unanticipated event introduces three important areas that the QA Consultants recommend be evaluated: 1. Immediate Impact on the RMS Software Functionality, Reliability and Performance: 2. Long Term Impact on RMS Product: 3. Impact on Procurement:[12]	Accepted	During the August ESC Meeting, the Committee reviewed the recommendation in detail, and agreed that the three questions should be addressed by the project team for the ESC's consideration. No vote was conducted.	Unknown	Immediate	N/A
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.	Carlstrom	Report on progress by 9/22	N/A
67	06/23/11 3.0.2.1	To enable a more transparent and interactive approach toward resolving issues and defects, the QA consultants recommend granting the participating agency representatives access to the complete "CAD Next Go Live Issue Tracking Spreadsheet" workbook.	Discussed/Under Evaluation	Director Turley clarified that the full report is made available, on a weekly basis, to internal (city) stakeholders (including the Police Advisory Team), while a modified version is made	Merlo	Follow up on 9/22	N/A

[12] Note that this recommendation has been abridged to reduce copy size – the text following each of the three recommendations is available in the May and June QA reports.

ID	RECOMMENDATION LOCATION	SUMMARY OF RECOMMENDATION	ACTION TAKEN	STATUS OF ACTION	ASSIGNED TO	DUE BY	COMPLETE DATE
				available for external parties on a monthly basis. Director Turley is comfortable with the current approach. No vote was taken on the recommendation, with some Committee members preferring to think about the subject prior to rendering a final vote.			
69	06/23/11 3.0.6.1	The post CAD cutover Zetron issues include technical and functional problems that were not forecast in the original Zetron project plan. QA recommends that PSSRP form a working group comprised of technical and business experts to identify the following: 1. The specific technical and business issues which must be resolved, 2. A detailed approach for correcting each identified issue, 3. An estimated timeline and budget for correcting each issue, 4. Predefined intervals for meeting with one another, as well as for providing updated information to the ESC.	Accepted/Closed	PSSRP facilitated a Zetron-specific meeting on August 9 with PF&R, BTS and BOEC representatives in attendance. The attendees collaboratively identified existing defects and issues.	N/A	N/A	8/9