

# Gaining a Competitive Advantage in Public Safety

## INDUSTRY AT A GLANCE



The purpose of this brochure is to provide Zebra and select channel partner sales associates with vertical market and application information. By familiarizing yourself with the market and application information, understanding the key buying influences, and arming yourself with the most salient questions to uncover the needs relative to each application, you'll be able to more effectively sell business solutions into the public safety market.

Approved for use by Zebra sales and marketing teams and by select partners.

### What's Inside:

#### Industry Overview

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- » Forecast
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#### Selling to the Market

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- » Business Drivers
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## INDUSTRY OVERVIEW

### Public Safety Market: What's the scope of this market?

The public safety market includes:

Law Enforcement Agencies	No. of Facilities
Federal	1,795
State	1,034
County	3,154
Municipal	13,192

- » County corrections agencies on three levels: 102 federal, 4,320 state, and 3,106 county corrections agencies
- » A variety of other public safety agencies, including 28,533 municipal fire departments, and 66 federal and 51 state emergency management agencies
- » The market also includes 2,195 campus, 271 tribal, 54 conservation, 507 military, and 120 railroad law enforcement agencies; 314 airport and harbor police; and 668 law enforcement training academies.

### Public Safety Forecast

The demand for security-related products and central station monitoring services has grown at healthy — and occasionally phenomenal — rates since 1980, according to data compiled by the industry's leading research firms. Although historically the industry grows from 8 to 12 percent each year, expectations from the 9-11 attacks have boosted growth to at least 20 percent for 2002 and significantly higher growth in subsequent years.

Prof. James F. Pastor, Calumet College of St. Joseph (Whiting, Indiana), estimates the U.S. private security market at \$52 billion annually, while employing 1.5 million people. By comparison, public police forces spend \$30 billion annually and employ approximately 600,000 people.

### Key emerging trends to watch are:

In the aftermath of the September 11, 2001 terrorist attacks, 22 government agencies were coordinated into one Department of Homeland Security (DHS). The major divisions include: Border and Transportation Security; Emergency Preparedness and Response; Science and Technology; Information Analysis and Infrastructure Protection; and Management. Federal agencies included in the new DHS include the U.S. Secret Service, the U.S. Coast Guard, and Customs and Immigration, among others.

Little has changed with regard to jurisdiction, mission, and budget for most of the federal agencies that have moved into the new DHS. Much of the responsibility and budget that is being allocated for homeland security is being directed at the state and municipal agencies that will be the first responders in the event of a disaster.

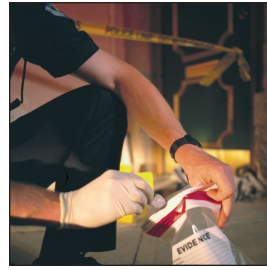
- » Public safety agencies will continue to explore new technologies to improve safety and security and to reduce time spent on administrative matters.
- » Public safety agencies are becoming increasingly and rapidly proficient in applying new technology to operations as information technology (IT) groups are becoming part of many public safety organizations.
- » The fraternal nature of public safety agencies leads to a high level of information sharing relative to successful solutions and solution providers.
- » Radio frequency identification (RFID) is emerging as a technology that offers an improved solution to several applications in the public safety market including access control and visitor management, disaster management, evidence tracking, and prisoner tracking.

### What do industry watchers say about this market?

- » Public safety agencies are far more technologically savvy than they were a few years ago.
- » The public safety sector is fundamentally shifting from being techno-phobic to techno-centric.
- » RFID is clearly a technology in which companies serving the public safety market see great potential.
- » There is continued emphasis on getting information into the system faster and improving communication within and among agencies.
- » There is an increased need to standardize processes and information formats for increased efficiency and sharing of data.

Darryl Moody, vice president of BearingPoint, classifies the general areas of business needs related to the homeland security market as follows:

- » First responder capabilities (e.g., disaster management and communications equipment)
- » Direct federal mission execution (e.g., border security, port, and airport screening)
- » Organizational and operational management efficiencies (e.g., data integration)



## SELLING TO THE PUBLIC SAFETY MARKET

### Who are key decision makers in this market?

At the municipal level, these responsibilities reside with the police, fire, and emergency management agencies, all beneficiaries of the billions of dollars in federal grant money being appropriated for homeland security.

Decision makers vary by organization/agency, as follows:

- » Within federal agencies: Procurement Officer (headquarters), Agent-in-Charge (field offices)
- » Within state agencies: Public Safety Commissioner, Department Head (headquarters), Division Head, IT Supervisor (divisions)
- » Within county agencies: Sheriff, Warden, IT Supervisor
- » Within municipal agencies: Chief of Police, Fire Chief or Agency Head, City or Town Management Division Head, IT Supervisor

### What are the key decision makers' concerns in this market?

- » Facilitating accurate and efficient information sharing across agencies — Data manually collected by public safety agencies has historically contained errors of content and omission. The problem is compounded by the need for multiple layers of data entry from different parties within agencies. This is true whether the application is traffic and parking citations, evidence marking and tracking, property room management, file tracking, or even access control. Bar coding increases the accuracy of shared data.
- » Reducing time spent on paperwork and administrative matters —
  - Use of electronic citations (according to the Bureau of Justice Assistance) can eliminate up to 200 keystrokes per traffic citation, thereby significantly increasing conviction and fine-collection rates.
  - Information that is sent directly from the patrol car back to police headquarters or the court benefits administration by improving data quality and availability. According to the U.S. Department of Transportation, pilot projects using electronic citation devices have demonstrated a significant reduction in officer and office staff processing time.
- » Improving safety and security — Electronic citations also promote safety by allowing the police officer to spend more time observing and interacting with the violator rather than focusing on handwriting a ticket.
- » Return on investment — While not an insignificant issue with public safety agencies, ROI is less important than improving safety and security and reducing time spent on paperwork and administrative matters.

### What are the most strategically important investments anticipated within this market, over the next five years?

Homeland security initiatives at the federal, state, and local levels will see a significant infusion of money from the billions of dollars appropriated for increasing security systems at borders, ports, and airports for grants to first responders.

- » State governments are projected to spend between \$5.1 and \$10.2 billion, while local governments are projected to spend between \$9.5 and \$19 billion on homeland security. The top critical solutions include response management, communications, data gathering, security and protection, and facilitating integration. (Source: Deloitte Consulting and Aviation Week)
- » The U.S. market for electronic access controls is \$3.3 billion and is forecast to increase 12.8 percent annually through 2005. (Source: The Freedonia Group)
- » Needed technologies related to homeland security include those for providing advanced encryption, smart cards, and sensors. (Source: Government Electronics and Information Technology Association)

### How can Zebra support those investments, to provide maximum return on customer investments?

Zebra printers are part of innovative and reliable on-demand printing solutions for public safety and homeland security agencies. They perform in a variety of applications to minimize administrative time, increase accuracy, and improve safety and security. Agencies use Zebra printing solutions to:

- » Issue traffic, parking, or code violation citations on-site, simultaneously sending a copy to headquarters and the court via wireless technology. Electronic citations significantly reduce the 10 percent error factor associated with manually written citations — to increase collection and conviction rates, and allow instant access to data by a variety of agencies.
- » Manage and track evidence, personal property, found property, and property for safekeeping. For law enforcement agencies, medical examiners, coroners' offices, and crime and forensic laboratories, bar coding tracks evidence from the crime scene to the courtroom.
- » Manage and track files in public safety agencies.
- » Print badges or RFID wristbands to manage personnel, even enable access control at crime scenes, fires, and other natural and man-made disasters.
- » Print ID cards, labels, or wristbands for employees, guests, students, and prisoners — for jails and prisons, public safety agencies, police academies, and various courts.
- » Print ID cards for community policing programs, plus children's ID cards for child safety programs.

# THE PUBLIC SAFETY SOLUTIONS

## Electronic Citations

There's a Zebra Printer and Media Solution perfect for your LAW ENFORCEMENT/PUBLIC SAFETY application!

PRINTER	MEDIA DESCRIPTION	ZEBRA RAW MATERIAL PART NO.
<b>Electronic Moving and Parking Citations</b>		
Cameo 3N (Portable Printer)	Zebra Direct Quick Print 3000, 3.3 mil direct thermal paper tag.	64777RM
QL 320 or QL 420 (Portable Printers)	Zebra 3.8 mil direct thermal paper tag.	65906RM
<b>Evidence &amp; Property Management</b>		
TLP 2844 (Desktop Printer)	Zebra Trans Matte 2000, thermal transfer paper label.	05210RM
PT 403 (Portable Printer)	Zebra Trans Matte 2000, thermal transfer paper label.	05210RM
QL 320 or QL 420 (Portable Printers)	Zebra Direct Lab 3000 direct thermal paper label.	05663RM
<b>File Management</b>		
TLP 2844 (Desktop Printer)	Zebra Trans Matte 2000 thermal transfer paper label.	05210RM
<b>Identification &amp; Access Control</b>		
P 310 (Card Printer)	Please inquire.	Inquire
TLP 2844 (Desktop Printer)	Zebra Trans Matte 2000, thermal transfer paper label.	05210RM
<b>Disaster Management</b>		
P 310 (Card Printer)	Please inquire.	Inquire
TLP 2844 (Desktop Printer)	Zebra Trans Matte 2000 thermal transfer paper label.	05210RM
QL 320 or 420 (Portable Printers)	Zebra Direct Lab 3000 direct thermal paper label.	05663RM

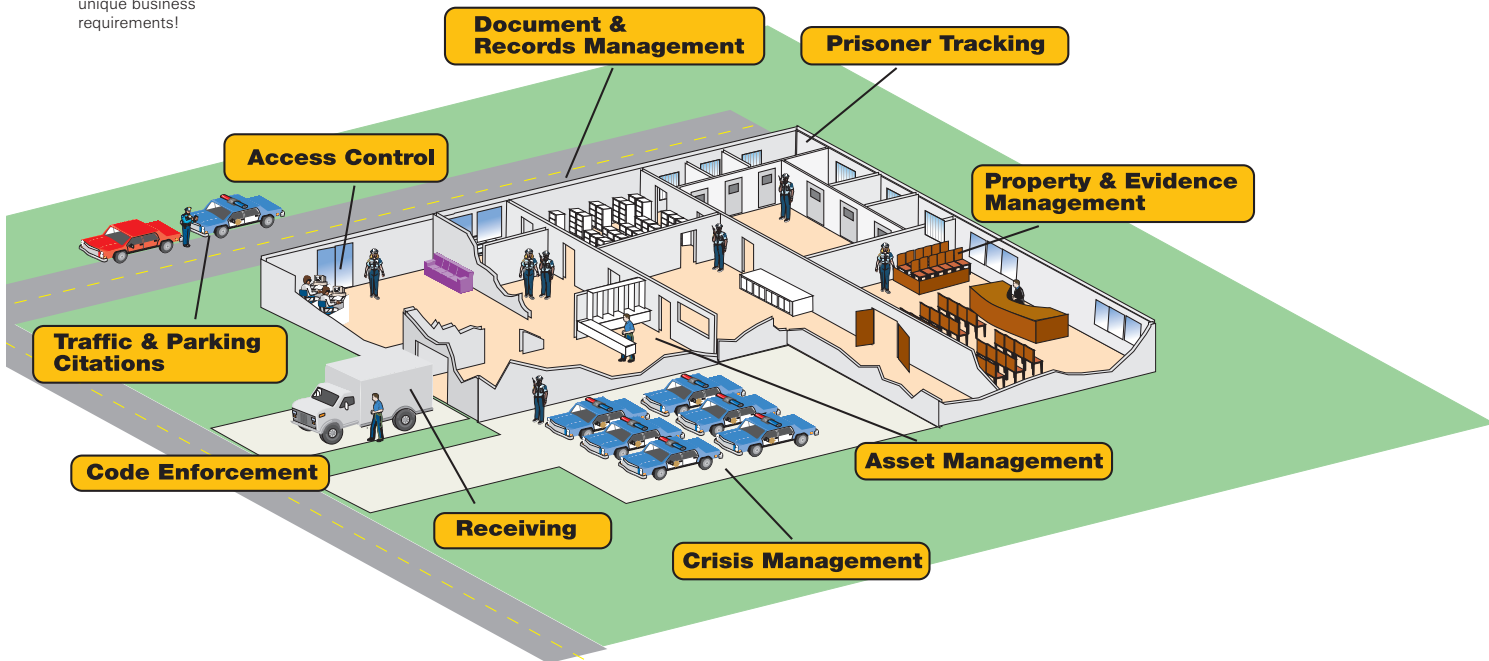
Traditionally, parking and traffic citations have been handwritten in booklets carried by state highway patrols, local traffic officers, and municipal non-sworn officers/civilians. Accurate and efficient, electronic citation systems replace the multi-layered paper system with software that operates with a handheld device and a mobile printer.

Since police spend approximately 11 percent of their patrol time on traffic accident investigation, parking problems, motor vehicle driving problems, and traffic control — and about 22 percent of their in-service reports on traffic problems — electronic citation processes offer the opportunity to significantly increase police staff efficiency.

### Typical sales probing questions:

- » Are you the person in charge of (traffic/parking/fire/building code) enforcement processes?
- » Does your agency currently use a manual or electronic (traffic/parking/fire code) citation system?

» **Note:** Zebra will be happy to provide recommendations and pricing on stock or custom media to satisfy your unique business requirements!



#### DID YOU KNOW ZEBRA PRINTERS CAN HELP YOU:

- » Eliminate the cost and delay of entering citation data manually into one or more databases?
- » Produce totally accurate, easy-to-read tickets in as little as 60 seconds?
- » Store citation data electronically to integrate with virtually any agency records and court systems?

### » Evidence and Property Management

Property and evidence tracking software is coupled with a handheld scanner and a desktop or mobile printer to provide agencies with an automated system to manage property and evidence, from collection site through court process.

Marking evidence is critical to maintaining the chain of custody: the written record of all of the individuals who have maintained unbroken control over the item of evidence. It establishes proof that the item collected at the crime scene is the same evidence that is presented in a court of law.

#### Typical sales probing questions:

- » Are you the person in charge of evidence/property management? (Often the same person has responsibility for both.)

#### DID YOU KNOW ZEBRA PRINTERS CAN HELP YOU:

- » Cut down on time spent on administrative duties by using bar codes to track and manage evidence/property?
- » Quickly locate evidence/property in your evidence/property room?
- » Have immediate access to information and maintain a chain-of-custody log on all items under your evidence/property room control?
- » Schedule random and full audits automatically?

### » File Management

Public safety and intelligence agencies maintain volumes of reports and documents including personnel files, informant files, case files, and intelligence reports, all requiring varying levels of security. Traditionally, a handwritten log of individuals who have had access to the file would be maintained. Using a desktop printer, software, and a scanner, agencies can apply and scan bar code labels as a more secure, automated and efficient way to process and track documents within and across multiple agencies.

#### Typical sales probing questions:

- » Are you the person in charge of file and records management?

#### DID YOU KNOW ZEBRA PRINTERS CAN HELP YOU:

- » Cut down on time on administrative matters by using bar codes to track and manage files and records?
- » Increase security by recording every move and change to sensitive documents?
- » Have immediate access to information and maintain an audit trail on files and records?

### » Identification and Access Control

Public safety agencies, forensic labs, police academies, courts, and prisons all require varying levels of restricted access at their facilities — for reception areas open to the public, firearms/ammunition storage areas, evidence rooms, executive offices, and judges' chambers. Card printers are often used with a software program to print employee ID and access control cards.

#### Typical sales probing questions:

- » Are you the person in charge of security/the community policing program/child safety program for your facility?

#### DID YOU KNOW ZEBRA PRINTERS CAN HELP YOU:

- » Monitor guard service activities in your facility?
- » Limit and monitor employee access to sensitive areas such as evidence and property rooms, firearms and ammo vaults, executive offices, and communications and dispatch rooms?
- » Create ID cards for a child safety program?
- » Create patrol-officer ID cards for your community-policing program?
- » Identify, announce, and track visitors?
- » Develop a crisis access control system that will allow you to identify and monitor individuals who should be allowed access to a crime scene or the scene of a disaster?
- » Track the location of prisoners in your facility?

### » Disaster Management

Disasters include floods, earthquakes, hurricanes, tornadoes, crashes, accidents, and fires, as well as arson, bombings, hijackings, and hostage situations. Access control allows police, fire and medical personnel, investigators and evidence technicians, and photographers and media representatives to be admitted where necessary to do their jobs, while excluding others from the disaster site. To provide access control, agencies issue semi-permanent/temporary cards or badges using card printers or label (desktop or mobile) printers and the appropriate software.

#### Typical sales probing questions:

- » Are you the person in charge of emergency or crisis management at your agency?

#### DID YOU KNOW ZEBRA PRINTERS CAN HELP YOU:

- » Identify and monitor those individuals who should be allowed access to a crime scene or the scene of a crisis such as a fire, explosion, or hostage situation?

## NEED MORE INFORMATION?

### Looking for more information about public safety market and applications? Visit these sources for more information!

#### Public safety organizations, associations and publications:

- » The International Association of Chiefs of Police  
[www.theiacp.org](http://www.theiacp.org)
- » International Union of Police Associations  
[www.iupa.org](http://www.iupa.org)
- » National Association of Police Organizations  
[www.napo.org](http://www.napo.org)
- » International Association for Property and Evidence, Inc.  
[www.iape.org](http://www.iape.org)
- » American Society of Crime Lab Directors  
[www.asclcd.org](http://www.asclcd.org)
- » Commission on Accreditation for Law Enforcement Agencies  
[www.calea.org](http://www.calea.org)
- » *Law and Order*  
[www.hendonpub.com](http://www.hendonpub.com)
- » *Law Enforcement Product News*  
[www.officer.com](http://www.officer.com)

#### Homeland security organizations and associations:

- » American Society for Industrial Security International  
[www.asisonline.org](http://www.asisonline.org)
- » Security Industry Association  
[www.SIAonline.org](http://www.SIAonline.org)
- » International Security Management Association  
[www.ismanet.com](http://www.ismanet.com)
- » *Security Products*  
[www.secprodonline.com](http://www.secprodonline.com)

#### Trade publications and directories:

- » National Directory of Law Enforcement Administrators  
[www.safetysource.com](http://www.safetysource.com)
- » National Directory of Fire Chiefs and EMS Administrators  
[www.safetysource.com](http://www.safetysource.com)
- » Homeland Security Directory  
[www.greyhouse.com](http://www.greyhouse.com)
- » *Security Management*  
[www.securitymanagement.com](http://www.securitymanagement.com)
- » *The Police Chief*
- » *Evidence Log*
- » *Law Enforcement Technology*

#### Zebra resources:

- [www.zebra.com/IS/law-enforcement.htm](http://www.zebra.com/IS/law-enforcement.htm)
- [www.accesszebra.com](http://www.accesszebra.com) (Sales Driver)
- [www.zipzebra.com](http://www.zipzebra.com) (for Media)

## PARTNERSFIRST



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