

**Request for Proposal (RFP) for  
Get It Done/Salesforce Platform Application Development, Maintenance, and  
Support  
Addendum A**

**Solicitation Number:** 10089580-20-J

**Solicitation Issue Date:** September 6, 2019

**Mandatory Pre-Proposal Conference:** September 10, 2019 @ 2:00 p.m.  
City of San Diego  
1200 3<sup>rd</sup> Ave, Suite 200  
San Diego, Ca. 92101

**Questions and Comments Due:** September 12, 2019 @ 12:00 p.m.

**Proposal Due Date and Time ("Closing Date"):** **October 21, 2019 @ 2:00 p.m.**

**Contract Terms:** Two (2) years from Effective Date with three (3) one-year options to renew, as defined in Article I, Section 1.2 of the City's General Contract Terms and Conditions.

**City Contact:** Janet Polite, Senior Procurement Contracting Officer  
1200 Third Avenue, Suite 200  
San Diego, California 92101  
jpolite@sandiego.gov  
(619) 236-7017

**Submissions:** Proposer is required to provide eight (8) originals and one (1) electronic copy (e.g. thumb drive or CD) of their response as described herein.

Completed and signed RFP signature page is required, with most recent addendum listed as acknowledgement of all addenda issued.

**Note: Emailed submissions will not be accepted.**

**CONTRACT RESULTING FROM REQUEST FOR PROPOSAL NUMBER 10089580-20-J, Get It Done/Salesforce Platform Application Development, Maintenance, and Support**

This Contract (Contract) is entered into by and between the City of San Diego, a municipal corporation (City), and the successful proposer to Request for Proposal (RFP) # 10089580-20-J, Get It Done/Salesforce Platform Application Development, Maintenance, and Support (Contractor).

**RECITALS**

On or about 9/6/2019, City issued an RFP to prospective proposers on services to be provided to the City. The RFP and any addenda and exhibits thereto are collectively referred to as the "RFP." The RFP is attached hereto as Exhibit A.

City has determined that Contractor has the expertise, experience, and personnel necessary to provide the services.

City wishes to retain Contractor to provide Get It Done/Salesforce Platform Application Development, Maintenance, and Support as further described in the Scope of Work, attached hereto as Exhibit B. (Services).

For good and valuable consideration, the sufficiency of which is acknowledged, City and Contractor agree as follows:

**ARTICLE I  
CONTRACTOR SERVICES**

**1.1 Scope of Work.** Contractor shall provide the Services to City as described in Exhibit B which is incorporated herein by reference. Contractor will submit all required forms and information described in Exhibit A to the Purchasing Agent before providing Services.

**1.2 General Contract Terms and Provisions.** This Contract incorporates by reference the General Contract Terms and Provisions, attached hereto as Exhibit C.

**ARTICLE II  
DURATION OF CONTRACT**

**2.1 Term.** This Contract shall be for a period of two (2) years beginning on the Effective Date. City may, in its sole discretion, extend this Contract for three (3) additional one-year period(s). The term of this Contract shall not exceed five years unless approved by the City Council by ordinance.

**2.2 Effective Date.** This Contract shall be effective on the date it is executed by the last Party to sign the Contract, and approved by the City Attorney in accordance with San Diego Charter Section 40.

**ARTICLE III  
COMPENSATION**

**3.1 Amount of Compensation.** City shall pay Contractor for performance of all Services rendered in accordance with this Contract in an amount not to exceed the amount authorized by the City Council by resolution.

**ARTICLE IV  
WAGE REQUIREMENTS**

**4.1** Reserved.

**ARTICLE V  
CONTRACT DOCUMENTS**

**5.1 Contract Documents.** The following documents comprise the Contract between the City and Contractor: this Contract and all exhibits thereto, the RFP; the Notice to Proceed; and the City's written acceptance of exceptions or clarifications to the RFP, if any.

**5.2 Contract Interpretation.** The Contract Documents completely describe the Services to be provided. Contractor will provide any Services that may reasonably be inferred from the Contract Documents or from prevailing custom or trade usage as being required to produce the intended result whether or not specifically called for or identified in the Contract Documents. Words or phrases which have a well-known technical or construction industry or trade meaning and are used to describe Services will be interpreted in accordance with that meaning unless a definition has been provided in the Contract Documents.

**5.3 Precedence.** In resolving conflicts resulting from errors or discrepancies in any of the Contract Documents, the Parties will use the order of precedence as set forth below. The 1<sup>st</sup> document has the highest priority. Inconsistent provisions in the Contract Documents that address the same subject, are consistent, and have different degrees of specificity, are not in conflict and the more specific language will control. The order of precedence from highest to lowest is as follows:

1<sup>st</sup> Any properly executed written amendment to the Contract

2<sup>nd</sup> The Contract

3<sup>rd</sup> The RFP and the City's written acceptance of any exceptions or clarifications to the RFP, if any

4<sup>th</sup> Contractor's Pricing

**5.4 Counterparts.** This Contract may be executed in counterparts which, when taken together, shall constitute a single signed original as though all Parties had executed the same page.

**5.5 Public Agencies.** Other public agencies, as defined by California Government Code section 6500, may choose to use the terms of this Contract, subject to Contractor's acceptance. The City is not liable or responsible for any obligations related to a subsequent Contract between Contractor and another public agency.

IN WITNESS WHEREOF, this Contract is executed by City and Contractor acting by and through their authorized officers.

CONTRACTOR

Deloitte Consulting LLP  
Proposer  
655 W Broadway, Suite 700  
Street Address  
San Diego, CA 92101  
City  
(858) 239-3970  
Telephone No.  
thbeyer@deloitte.com  
E-Mail

BY: Thomas Beyer

Signature of  
Proposer's Authorized  
Representative  
Thomas Beyer  
Print Name  
Principal  
Title  
10/21/2019  
Date

CITY OF SAN DIEGO  
A Municipal Corporation

BY: [Signature]

Print Name:  
Rolando Charvel  
Director, Purchasing & Contracting  
Department Chief Financial Officer

7/21/2020  
Date Signed

Approved as to form this 23<sup>rd</sup> day of  
July, 2020  
MARA W. ELLIOTT, City Attorney

BY: [Signature]  
Deputy City Attorney

313128

**EXHIBIT A  
PROPOSAL SUBMISSION AND REQUIREMENTS**

**A. PROPOSAL SUBMISSION**

**1. Timely Proposal Submittal.** Proposals must be submitted as described herein to the Purchasing & Contracting Department (P&C).

**1.1 Reserved.**

**1.2 Paper Proposals.** The City will accept paper proposals in lieu of eProposals. Paper proposals must be submitted in a sealed envelope to the Purchasing & Contracting Department (P&C) located at 1200 Third Avenue, Suite 200, San Diego, CA 92101. The Solicitation Number and Closing Date must be referenced in the lower left-hand corner of the outside of the envelope. Faxed proposals will not be accepted.

**1.3 Proposal Due Date.** Proposals must be submitted prior to the Closing Date indicated on the eBidding System. E-mailed and/or faxed proposals will not be accepted.

**1.4 Pre-Proposal Conference.** Pre-proposal conference information is noted on the eBidding System.

**1.4.1** Proposers are required to attend the pre-proposal conference. Proposer's failure to attend will result in disqualification.

**1.5 Questions and Comments.** Written questions and comments must be submitted electronically via the eBidding System no later than the date specified on the eBidding System. Only written communications relative to the procurement shall be considered. The City's eBidding System is the only acceptable method for submission of questions. All questions will be answered in writing. The City will distribute questions and answers without identification of the inquirer(s) to all proposers who are on record as having received this RFP, via its eBidding System. No oral communications can be relied upon for this RFP. Addenda will be issued addressing questions or comments that are determined by the City to cause a change to any part of this RFP.

**1.6 Contact with City Staff.** Unless otherwise authorized herein, proposers who are considering submitting a proposal in response to this RFP, or who submit a proposal in response to this RFP, are prohibited from communicating with City staff about this RFP from the date this RFP is issued until a contract is awarded.

**2. Proposal Format and Organization.** Unless electronically submitted, all proposals should be securely bound and must include the following completed and executed forms and information presented in the manner indicated below:

**Tab A - Submission of Information and Forms.**

**2.1** Completed and signed Contract Signature Page. If any addenda are issued, the latest Addendum Contract Signature Page is required.

**2.2** Exceptions requested by proposer, if any. The proposer must present written factual or legal justification for any exception requested to the Scope of Work, the

Contract, or the Exhibits thereto. Any exceptions to the Contract that have not been accepted by the City in writing are deemed rejected. The City, in its sole discretion, may accept some or all of proposer's exceptions, reject proposer's exceptions, and deem the proposal non-responsive, or award the Contract without proposer's proposed exceptions. The City will not consider exceptions addressed elsewhere in the proposal.

2.3 The Contractor Standards Pledge of Compliance Form.

2.4 Equal Opportunity Contracting forms including the Work Force Report and Contractors Certification of Pending Actions.

2.5 Reserved.

2.6 Licenses as required in Exhibit B.

2.7 Reserved.

2.8 Additional Information as required in Exhibit B.

2.9 Reserved.

2.10 Reserved.

2.11 Reserved.

**Tab B - Executive Summary and Responses to Specifications.**

2.12 A title page.

2.13 A table of contents.

2.14 An executive summary, limited to one typewritten page, that provides a high-level description of the proposer's ability to meet the requirements of the RFP and the reasons the proposer believes itself to be best qualified to provide the identified services.

2.15 Proposer's response to the RFP.

**Tab C - Cost/Price Proposal (if applicable).** Proposers shall submit a cost proposal in the form and format described herein. Failure to provide cost(s) in the form and format requested may result in proposal being declared non-responsive and rejected.

**3. Proposal Review.** Proposers are responsible for carefully examining the RFP, the Specifications, this Contract, and all documents incorporated into the Contract by reference before submitting a proposal. If selected for award of contract, proposer shall be bound by same unless the City has accepted proposer's exceptions, if any, in writing.

**4. Addenda.** The City may issue addenda to this RFP as necessary. All addenda are incorporated into the Contract. The proposer is responsible for determining whether addenda were issued prior to a proposal submission. Failure to respond to or properly address addenda may result in rejection of a proposal.

**5. Quantities.** The estimated quantities provided by the City are not guaranteed. These quantities are listed for informational purposes only. Quantities vary depending on the demands of the City. Any variations from the estimated quantities shall not entitle the proposer to an adjustment in the unit price or any additional compensation.

**6. Quality.** Unless otherwise required, all goods furnished shall be new and the best of their kind.

**6.1 Items Offered.** Proposer shall state the applicable trade name, brand, catalog, manufacturer, and/or product number of the required good, if any, in the proposal.

**6.2 Brand Names.** Any reference to a specific brand name in a solicitation is illustrative only and describes a component best meeting the specific operational, design, performance, maintenance, quality, or reliability standards and requirements of the City. Proposer may offer an equivalent or equal in response to a brand name referenced (Proposed Equivalent). The City may consider the Proposed Equivalent after it is subjected to testing and evaluation which must be completed prior to the award of contract. If the proposer offers an item of a manufacturer or vendor other than that specified, the proposer must identify the maker, brand, quality, manufacturer number, product number, catalog number, or other trade designation. The City has complete discretion in determining if a Proposed Equivalent will satisfy its requirements. It is the proposer's responsibility to provide, at their expense, any product information, test data, or other information or documents the City requests to properly evaluate or demonstrate the acceptability of the Proposed Equivalent, including independent testing, evaluation at qualified test facilities, or destructive testing.

**7. Modifications, Withdrawals, or Mistakes.** Proposer is responsible for verifying all prices and extensions before submitting a proposal.

**7.1 Modification or Withdrawal of Proposal Before Proposal Opening.** Prior to the Closing Date, the proposer or proposer's authorized representative may modify or withdraw the proposal by providing written notice of the proposal modification or withdrawal to the City Contact via the eBidding System. E-mail or telephonic withdrawals or modifications are not permissible.

**7.2 Proposal Modification or Withdrawal of Proposal After Proposal Opening.** Any proposer who seeks to modify or withdraw a proposal because of the proposer's inadvertent computational error affecting the proposal price shall notify the City Contact identified on the eBidding System no later than three working days following the Closing Date. The proposer shall provide worksheets and such other information as may be required by the City to substantiate the claim of inadvertent error. Failure to do so may bar relief and allow the City recourse from the bid surety. The burden is upon the proposer to prove the inadvertent error. If, as a result of a proposal modification, the proposer is no longer the apparent successful proposer, the City will award to the newly established apparent successful proposer. The City's decision is final.

**8. Incurred Expenses.** The City is not responsible for any expenses incurred by proposers in participating in this solicitation process.

**9. Public Records.** By submitting a proposal, the proposer acknowledges that any information submitted in response to this RFP is a public record subject to disclosure unless the City determines that a specific exemption in the California Public Records Act (CPRA)

applies. If the proposer submits information clearly marked confidential or proprietary, the City may protect such information and treat it with confidentiality to the extent permitted by law. However, it will be the responsibility of the proposer to provide to the City the specific legal grounds on which the City can rely in withholding information requested under the CPRA should the City choose to withhold such information. General references to sections of the CPRA will not suffice. Rather, the proposer must provide a specific and detailed legal basis, including applicable case law, that clearly establishes the requested information is exempt from the disclosure under the CPRA. If the proposer does not provide a specific and detailed legal basis for requesting the City to withhold proposer's confidential or proprietary information at the time of proposal submittal, City will release the information as required by the CPRA and proposer will hold the City, its elected officials, officers, and employees harmless for release of this information. It will be the proposer's obligation to defend, at proposer's expense, any legal actions or challenges seeking to obtain from the City any information requested under the CPRA withheld by the City at the proposer's request. Furthermore, the proposer shall indemnify and hold harmless the City, its elected officials, officers, and employees from and against any claim or liability, and defend any action brought against the City, resulting from the City's refusal to release information requested under the CPRA which was withheld at proposer's request. Nothing in the Contract resulting from this proposal creates any obligation on the part of the City to notify the proposer or obtain the proposer's approval or consent before releasing information subject to disclosure under the CPRA.

**10. Right to Audit.** The City Auditor may access proposer's records as described in San Diego Charter section 39.2 to confirm contract compliance.

**B. PRICING**

**1. Fixed Price.** All prices shall be firm, fixed, fully burdened, FOB destination, and include any applicable delivery or freight charges, and any other costs required to provide the requirements as specified in this RFP. The lowest total estimated contract price of all the proposals that meet the requirements of this RFP will receive the maximum assigned points to this category as set forth in this RFP. The other price schedules will be scored based on how much higher their total estimated contract prices compare with the lowest:

$$(1 - \frac{(\text{contract price} - \text{lowest price})}{\text{lowest price}}) \times \text{maximum points} = \text{points received}$$

For example, if the lowest total estimated contract price of all proposals is \$100, that proposal would receive the maximum allowable points for the price category. If the total estimated contract price of another proposal is \$105 and the maximum allowable points is 60 points, then that proposal would receive  $(1 - ((105 - 100) / 100) \times 60 = 57$  points, or 95% of the maximum points. The lowest score a proposal can receive for this category is zero points (the score cannot be a negative number). The City will perform this calculation for each Proposal.

**2. Taxes and Fees.** Taxes and applicable local, state, and federal regulatory fees should not be included in the price proposal. Applicable taxes and regulatory fees will be added to the net amount invoiced. The City is liable for state, city, and county sales taxes but is exempt from Federal Excise Tax and will furnish exemption certificates upon request. All

or any portion of the City sales tax returned to the City will be considered in the evaluation of proposals.

**3. Escalation.** An escalation factor is not allowed unless called for in this RFP. If escalation is allowed, proposer must notify the City in writing in the event of a decline in market price(s) below the proposal price. At that time, the City will make an adjustment in the Contract or may elect to re-solicit.

**4. Unit Price.** Unless the proposer clearly indicates that the price is based on consideration of being awarded the entire lot and that an adjustment to the price was made based on receiving the entire proposal, any difference between the unit price correctly extended and the total price shown for all items shall be offered shall be resolved in favor of the unit price.

### **C. EVALUATION OF PROPOSALS**

**1. Award.** The City shall evaluate each responsive proposal to determine which proposal offers the City the best value consistent with the evaluation criteria set forth herein. The proposer offering the lowest overall price will not necessarily be awarded a contract.

**2. Sustainable Materials.** Consistent with Council Policy 100-14, the City encourages use of readily recyclable submittal materials that contain post-consumer recycled content.

#### **3. Evaluation Process.**

**3.1 Process for Award.** A City-designated evaluation committee (Evaluation Committee) will evaluate and score all responsive proposals. The Evaluation Committee may require proposer to provide additional written or oral information to clarify responses. Upon completion of the evaluation process, the Evaluation Committee will recommend to the Purchasing Agent that award be made to the proposer with the highest scoring proposal.

#### **3.2 Reserved.**

**3.3 Mandatory Interview/Oral Presentation.** The City will require proposers to interview and/or make an oral presentation. Only the top three (3) proposers, scoring a minimum of sixty (60) points, will be asked to interview and/or make an oral presentation. Interviews and/or oral presentations will be made to the Evaluation Committee in order to clarify the proposals and to answer any questions. The interviews and/or oral presentations will be scored as part of the selection process. The City will complete all reference checks prior to any oral interview. Additionally, the Evaluation Committee may require proposer's key personnel to interview. Interviews may be by telephone and/or in person. Multiple interviews may be required. Proposers are required to complete their oral presentation and/or interviews within seven (7) workdays after the City's request. Proposers should be prepared to discuss and substantiate any of the areas of the proposal submitted, as well as proposer's qualifications to furnish the subject goods and services. Proposer is responsible for any costs incurred for the oral presentation and interview of the key personnel.

**3.4 Discussions/Negotiations.** The City has the right to accept the proposal that serves the best interest of the City, as submitted, without discussion or negotiation. Contractors should, therefore, not rely on having a chance to discuss, negotiate, and adjust their proposals. The City may negotiate the terms of a contract with the winning proposer

based on the RFP and the proposer’s proposal, or award the contract without further negotiation.

**3.5 Inspection.** The City reserves the right to inspect the proposer’s equipment and facilities to determine if the proposer is capable of fulfilling this Contract. Inspection will include, but not limited to, survey of proposer’s physical assets and financial capability. Proposer, by signing the proposal agrees to the City’s right of access to physical assets and financial records for the sole purpose of determining proposer’s capability to perform the Contract. Should the City conduct this inspection, the City reserves the right to disqualify a proposer who does not, in the City’s judgment, exhibit the sufficient physical and financial resources to perform this Contract.

**3.6 Evaluation Criteria.** The following elements represent the evaluation criteria that will be considered during the evaluation process:

	MAXIMUM EVALUATION POINTS
<b>A. Responsiveness to the RFP.</b>	<b>15</b>
1. Requested information included and thoroughness of response	
2. Understanding of the project and ability to deliver as exhibited in the Executive Summary.	
3. Technical understanding of the Salesforce platform and Get It Done org.	
<b>B. Staffing Plan.</b>	<b>15</b>
1. Qualifications of personnel adequate for requirement	
2. Availability of personnel for required tasks	
3. Clearly defined Roles/Responsibilities of personnel	
<b>C. Firm's Capability to provide the services and expertise and Past Performance.</b>	<b>35</b>
1. Relevant experience of the Firm and subcontractors	
2. Previous relationship of firm and subcontractors on similar projects	
3. Specific experience with Salesforce development and the Get It Done system	
4. Other pertinent experience	
5. Past/Prior Performance	
6. Capacity/Capability to meet the City’s needs in a timely manner	
7. Reference checks	
<b>D. Price.</b>	<b>10</b>
<b>E. Mandatory Demonstration/Presentation.</b>	<b>25</b>
1. Understanding of the City’s requirements	
2. Salesforce development methodology and ability to balance basic support needs with enhancements	
3. Management of Support Mode and Service Level Metrics	
4. Thoroughness and Clarity of Presentation	
<b>SUB TOTAL MAXIMUM EVALUATION POINTS:</b>	<b>100</b>

	MAXIMUM EVALUATION POINTS
<b>F. Participation by Small Local Business Enterprise (SLBE) or Emerging Local Business Enterprise (ELBE) Firms*</b>	<b>12</b>
FINAL MAXIMUM EVALUATION POINTS INCLUDING SLBE/ELBE:	<b>112</b>

\*The City shall apply a maximum of an additional 12 percentage points to the proposer’s final score for SLBE OR ELBE participation. Refer to Equal Opportunity Contracting Form, Section V.

**D. ANNOUNCEMENT OF AWARD**

**1. Award of Contract.** The City will inform all proposers of its intent to award a Contract in writing.

**2. Obtaining Proposal Results.** No solicitation results can be obtained until the City announces the proposal or proposals best meeting the City’s requirements. Proposal results may be obtained by: (1) e-mailing a request to the City Contact identified on the eBidding System or (2) visiting the P&C eBidding System to review the proposal results. To ensure an accurate response, requests should reference the Solicitation Number. Proposal results will not be released over the phone.

**3. Multiple Awards.** City may award more than one contract by awarding separate items or groups of items to various proposers. Awards will be made for items, or combinations of items, which result in the lowest aggregate price and/or best meet the City’s requirements. The additional administrative costs associated with awarding more than one Contract will be considered in the determination.

**E. PROTESTS.** The City’s protest procedures are codified in Chapter 2, Article 2, Division 30 of the San Diego Municipal Code (SDMC). These procedures provide unsuccessful proposers with the opportunity to challenge the City’s determination on legal and factual grounds. The City will not consider or otherwise act upon an untimely protest.

**F. SUBMITTALS REQUIRED UPON NOTICE TO PROCEED.** The successful proposer is required to submit the following documents to P&C **within ten (10) business days** from the date on the Notice to Proceed letter:

**1. Insurance Documents.** Evidence of all required insurance, including all required endorsements, as specified in Article VII of the General Contract Terms and Provisions.

**2. Taxpayer Identification Number.** Internal Revenue Service (IRS) regulations require the City to have the correct name, address, and Taxpayer Identification Number (TIN) or Social Security Number (SSN) on file for businesses or persons who provide goods or services to the City. This information is necessary to complete Form 1099 at the end of each tax year. To comply with IRS regulations, the City requires each Contractor to provide a Form W-9 prior to the award of a Contract.

**3. Business Tax Certificate.** Unless the City Treasurer determines a business is exempt, all businesses that contract with the City must have a current business tax certificate.

**4. Reserved.**

**5. Payment Card Industry Data Security Documents.** Evidence of all required documents, as described in Exhibit B.

The City may find the proposer to be non-responsive and award the Contract to the next highest scoring responsible and responsive proposer if the apparent successful proposer fails to timely provide the required information or documents.

## **EXHIBIT B SCOPE OF WORK**

### **A. INTRODUCTION & BACKGROUND**

The City of San Diego (City) launched the Get It Done Pilot Project (Pilot) on May 20, 2016 as a way for our customers to simply and easily connect with City services. The Pilot was initially focused on services handled by the Transportation & Storm Water Department (TSW) and was developed on the Salesforce platform. For work associated with the Pilot, the City's incumbent Application Development provider CGI Technologies and Solutions, Inc. ("CGI") provided system implementation services and Hopscotch Labs provided user design research. The public-facing "Get It Done San Diego" mobile app is provided by Connected Bits, LLC. After a successful pilot, and with the support of the Mayor and City Council, the City launched an expansion of the Get It Done system.

In 2017, an RFP was issued to select a system implementation firm and a software platform in order to transition from the Get It Done Pilot to an expanded system. The intent was to include additional departments, retire legacy systems, and offer more digital services to our customers through Get It Done. As a result of the RFP, Salesforce was selected as the software platform and Deloitte Consulting, LLP ("Deloitte") was selected as the system implementation firm. The Get It Done Expansion effort started in November 2017 and successfully launched in July and August 2018.

Since August 1, 2018, Deloitte has provided Get It Done/Salesforce Platform Application Development, Maintenance and Support services to the City through a two-year contract which expires July 31, 2020. At a high level, the purpose of this current RFP is to:

- Maintain baseline support for the City's Get It Done/Salesforce system;
- Provide a dedicated team to focus on enhancements and expansions to the system;
- Allow for other departments with Salesforce orgs to obtain as-needed support; and
- Provide the ability to spin-up project teams to develop and implement larger Salesforce projects.

### **B. GET IT DONE/SALESFORCE ORG**

The Get It Done Salesforce org contains the following major components, by department:

1. Communications Department (CommD)
  - a. FAQ/Knowledge Base
2. Department of Information Technology (DoIT)
  - a. Public-facing website/design
3. Development Services Department (DSD)
  - a. Code Enforcement Intake and Integration with Accela
4. Environmental Services Department (ESD)
  - a. Intake
    - i. ESD Customer Service Center
    - ii. ESD Miramar Place Collection Services
  - b. HAZMAT Appointments
  - c. Construction & Demolition Debris Deposits
  - d. Code Enforcement

- e. Collection Services
- f. Container Payments
- g. Field Operations
- 5. Office of the City Attorney
  - a. Research Functions
- 6. Office of the City Clerk
  - a. Passport Appointments
- 7. Office of the City Treasurer
  - a. ESD Container Payment Gateway/Bank Processing
- 8. Parks & Recreation Department
  - a. Open Space Code Enforcement
- 9. Performance & Analytics Department (Panda)
  - a. Get It Done system development / Salesforce org management
- 10. Public Utilities Department (PUD)
  - a. Food Establishment Waste Discharge (FEWD) Program
- 11. Transportation & Storm Water Department (TSW)
  - a. Intake
    - i. Public Works Dispatch
    - ii. Storm Water Code Enforcement Intake
    - iii. Traffic Engineering Intake
  - b. Storm Water Code Enforcement
  - c. Storm Water Structural BMPs
  - d. Storm Water Industrial Commercial
  - e. Right-of-Way Code Enforcement
    - i. Vegetation Encroachment
    - ii. Trench Repair
    - iii. Graffiti
  - f. Graffiti Abatement Team
    - i. Mobile Field Team (Tablets)
    - ii. Supervisor (Desktop)
- 12. San Diego Police Department (SDPD)
  - a. Vehicle-related Issues
    - i. 72-hour Violations / Abandoned Vehicles
    - ii. Parking Intake (Telephone Reporting Unit)
  - b. Neighborhood Policing

### **C. INTEGRATIONS**

The Get It Done system has the following integrations:

1. Smarty Streets (address verification)
2. Google Maps (public and internal mapping and address validation)
3. NOAA (weather reporting)
4. Graffiti Tracker (graffiti tracking/enforcement system)
5. Twilio (text message service)
6. City ESRI/GIS services
7. Connected Bits (public and internal mobile apps)
8. SAP EAM (Enterprise Asset Management services)
9. Accela (Development Services Code Enforcement)
10. Amazon S3 (storage for files)
11. BasicGov (components within Salesforce)

- 12. Okta SSO (Single Sign On)
- 13. Payment Gateway

The Proposer is responsible for maintenance of the portion of the interface that resides on the Get It Done/Salesforce platform and for communicating with 3<sup>rd</sup> party vendors.

In addition to the integrations listed above, the Proposer is responsible for maintenance of a Javascript map viewer app utilized by the system for displaying ESRI layers and allowing for asset selection. This app is placed within the internal Salesforce web page’s “console” view.

**D. TRANSITION PLAN**

The Proposer’s submission must include a detailed transition plan, outlining the steps, timeline, cost, process, and knowledge transfer methodology involved with providing a seamless transition from our current support vendor to the Proposer’s support model. The plan must be consistent with the figures entered in Exhibit D (Price Schedule), which includes a Transition section.

**E. BASELINE SUPPORT TEAM REQUIREMENTS**

Overall support for the Get It Done/Salesforce org is required 24/7/365. Certain public-facing components, such as the Get It Done public web portal and Get It Done mobile app operate at all times. The TSW Public Works Dispatch team also operates 24/7/365.

The Proposer must provide a plan to identify which resources will be available to provide 24/7/365 coverage. The resource plan must be consistent with the figures entered in Exhibit D (Price Schedule), which includes a section for Support Services (Section 1A).

The City utilizes ServiceNow to track incidents and a Salesforce-based tool called “Agile Accelerator” to monitor incident and enhancement requests.

At a minimum, one full-time on-site resource is required for the baseline support team. The on-site resource is responsible for communicating with any off-site team members. The City will provide a cubicle space. Identify the roles and responsibilities of the City and Proposer on a RACI chart.

If there are no incidents pending resolution, or upon mutual agreement with the City, the Baseline Support Team will be assigned enhancement change requests to supplement the work done by the Enhancement/Expansion Team described in the next section F.

Service Levels

Priority Matrix			
Urgency	Impact		
	High	Medium	Low
High	Priority 1	Priority 2	Priority 3
Medium	Priority 2	Priority 2	Priority 4
Low	Priority 3	Priority 4	Priority 5

Priority 1 incidents are called in to the City’s Help Desk. The Proposer would be transferred an incident via ServiceNow and telephone notification. The Proposer would be responsible for setting up a teleconference and alerting necessary resources to join the call. If the cause of the incident is determined to be the application that the Proposer is responsible for maintaining, the Proposer is responsible for creating a Root Cause Analysis (“RCA”), according to the Service Levels defined below.

Priority 2 and 3 incidents are logged in the City’s ServiceNow system by City of San Diego Get It Done system Points-of-Contact.

The chart below identifies required service levels and fee reduction weighting factors.

### Service Level Requirements and Fee Reduction Weighting Factors

ID	SLR	Service Measure	Performance Target	Minimum Performance	Measurement Interval	Reporting Period	Formula	Measurement Tool	Fee Reduction Weighting Factor
	<b>Incident Resolution SLRs</b>								
1	Time to Notify Client of a Priority 1 or 2 Incident	Time to respond	Priority 1 <15 minutes Priority 2 <60 minutes	Priority 1 95.0% Priority 2 100%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	0%
2	Incident Resolution - Priority Level 1	Time to Resolve	<4 hours <8 hours	95.0% 98.0%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	25%
3	Incident Resolution - Priority Level 2	Time to Resolve	<8 hours <16 hours	95.0% 98.0%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	20%

ID	SLR	Service Measure	Performance Target	Minimum Performance	Measurement Interval	Reporting Period	Formula	Measurement Tool	Fee Reduction Weighting Factor
4	Incident Resolution - Priority Level 3	Time to Resolve	<3 Business Days or within an agreed upon time frame	95.0%	Weekly	Monthly	Performance = Number of transactions completed within minimum performance	ServiceNow	10%
5	Incident Resolution - Priority Level 4	Time to Resolve	<5 Business Days or within an agreed upon time frame	95.0%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	0%
6	Incident Resolution - Priority Level 5	Time to Resolve	<10 Business Days or within an agreed upon time frame	95.0%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	0%
7	Root Cause Analysis	Time to report	Within 24 hours of Incident Resolution for Priority Level 1 or 2	95.0%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	0%
	<b>Customer Satisfaction SLR</b>								
8	Overall Satisfaction with Application Support Services	Satisfaction Level	All responding Client personnel should be very satisfied or satisfied with services	90%	Measure Quarterly, Report Quarterly	Quarterly	Sum of survey result from each participant/Total number of participants responding to Scheduled Survey	Survey Monkey or ServiceNow	10%

## **F. ENHANCEMENT/EXPANSION TEAM**

The intent of the Enhancement/Expansion Team is to provide a team that is dedicated to working on enhancement and expansion change requests. There must be at least one full-time resource located on site. This full-time resource is in addition to the on-site full-time resource dedicated to the baseline maintenance team, described in Section E. As part of the RFP Submittal, Proposers must describe a process for how enhancement requests will be evaluated, what the development methodology will involve, and how costs or time allocations will be estimated.

The City may request rough estimates of how many hours a project may take before proceeding with a development effort. As part of the proposal, Proposers must indicate the maximum size (in terms of development hours) a typical project handled by the Enhancement/Expansion Team would entail before it would become a Discretionary Project. (Note that with mutual consent, the maximum hour limit on an Enhancement/Expansion Team project may be waived.)

Further, Proposers must also identify the roles and responsibilities of the City and Proposer on a RACI chart. Proposers must identify how team capacity will be calculated and performance monitored and managed.

## **G. OTHER CITY SALESFORCE ORGS**

The City of San Diego currently has five Salesforce orgs. The Get It Done/Salesforce org is the City's primary org with the most users and applications. Other orgs include:

1. Economic Development Department (two orgs);
2. Office of the City Attorney (one org); and
3. Sustainability Department (one org).

This RFP only *requires* Application Development, Maintenance, and Support services for the main Get It Done/Salesforce org. However, as part of this RFP, other City departments with existing or future Salesforce orgs may request work through a separate project request and purchase order. The Proposer's response should indicate how maintenance and development requests from other orgs within the City will be managed and estimated. Proposers must provide an example with the proposal, utilizing rates consistent with the figures entered in the Price Schedule. The intent is that the City will be able to request Salesforce development and support services on an as-needed basis. The contract will provide a discretionary allowance to be used for this purpose.

As the City looks to transition more legacy applications to Salesforce, the resulting contract should allow the City to utilize the Proposer's services to maintain additional orgs, should the City establish additional orgs. Proposers must describe a process by which additional orgs can receive support services.

## **H. DISCRETIONARY PROJECTS**

As part of any agreement resulting from this RFP, the City may request that a project be created for a larger Salesforce development effort. These development projects would result in a separate purchase order with dedicated resources from the Proposer. Existing resources assigned to the Baseline Support Team or the Enhancement/Expansion Team may not be

utilized for a separate discretionary project, without agreement from the City. If upon agreement with the City resources from the Baseline Support Team or the Enhancement/Expansion Team are utilized, additional resources must be assigned to the Support and/or Enhancement teams to ensure adequate resources are assigned to all areas of responsibility.

Depending on the scope and specifics of the project, a decision will be made to collocate on the Get It Done/Salesforce org, or on a separate org. The City's preference is to collocate on the Get It Done/Salesforce org in most cases, in order to leverage user licenses to their fullest capacity.

As part of the RFP Submission, Proposers must provide a narrative and a process for how discretionary project requests will be evaluated, what the development methodology will involve, and how costs will be estimated. Proposers must include sample evaluation and discussion criteria that would be used between the City and Proposer to determine whether to move ahead with a discretionary project request.

Future projects<sup>1</sup> may include (but are not limited to) the following:

- Intranet Quorum<sup>2</sup> Replacement;
- Parks & Recreation Department services, such as service request submittal and intake, park reservations;
- Integration with SAP EAM for services offered by PUD, including water meter lid replacement;
- DSD Accela integration enhancement;
- Enabling Salesforce live chat functions;
- Programming Salesforce bots; and
- Other projects which can leverage the Salesforce platform.

The *total* Discretionary Project cost allocation included with the RFP submittal will not be scored, but the hourly rates that are associated with a Discretionary Project request will be considered as part of the overall RFP evaluation.

The City may request rough estimates of how many hours a project may take before proceeding with a development effort. As part of their RFP response, Proposers must describe how user requirements are collected and prototypes will be utilized to refine requirements.

## **I. STAFFING PLAN**

Proposers must provide a proposed organizational structure that indicates the staffing model for both the Support Services and the Project Enhancement/Expansion Team, including employee names and resumes. The City shall be consulted regarding any proposed staffing changes. For each job title identified on the organizational structure, Proposers must include

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<sup>1</sup> The City reserves the right to amend, add, or remove these projects from its forecast at its sole discretion

<sup>2</sup> Intranet Quorum (IQ) is a program utilized by some of the City's nine (9) Council Offices, Mayor's Office, and a few departments to manage constituent contacts. IQ also generates "Citizen Route Slips" which are initiated by Council Offices, administered by the City Information Center staff, and then routed to responsible departments for a response. Certain departments with a need to track customer inquiries, such as the Office of ADA and the Public Works Department, also use IQ.

a description of the position's roles and responsibilities, along with minimum qualifications. The details of the Staffing Plan must be consistent with the figures entered in Exhibit 4 – Pricing Plan. The Proposers response must indicate the minimum Salesforce experience and certifications that roles assigned to this contract must have and maintain.

Identify the people and any additional companies that comprise the team. Summarize the specific role and degree of involvement of each person in the team. The response should include a Firm Overview and Company Profile Information for each entity included in the response.

**Summary of Key Personnel:** Proposer must provide a summary of the key personnel who will be dedicated to providing the services described in this RFP. Provide the following details:

1. Title and reporting responsibility;
2. Proposed role, including the functions and tasks for which they will have primary responsibility (also indicate areas of secondary responsibility if appropriate);
3. Pertinent areas of expertise and past experience (particularly for Salesforce support and/or implementation projects); and
4. The location where they will provide the services (local or remote).

The City requires that the composition of the project team and key personnel assigned to the project remain consistent for the complete delivery of all support services associated with the project.

**Project Team Resumes:** Each project team resume should be formatted in a similar manner and contain the following content:

1. Brief overview of professional career
2. Professional background highlighting relevant projects or services that have been completed and role(s) in each project or services
3. Educational background
4. Professional activities and certifications

## **J. REFERENCES**

The proposer must describe their previous experience with providing Salesforce-specific Application Development, Maintenance, and Support Services to other clients. The experience and references should include government agencies or cities of similar size and scope.

Please use the form below to capture the required information. Experience will not be considered unless complete reference data is provided. A minimum of three (3) references is required.

All client reference information must be supported and verified. Reference contacts must be aware that they are being used and amenable to being contacted by the City. The City may solicit feedback from previous clients, including project and/or staff from the City of San Diego.

If the proposer proposes that major portions of the work will be performed by different team members, the proposer must provide at least three (3) references for each such team

member, preferably from similar government entities related to contracts of similar scope and magnitude as described in this RFP.

1. Organization Name:
2. Organization Address:
3. Contact Name:
4. Contact Telephone Number:
5. Contact Email Address:
6. Date Work Performed:
7. Description of Services Provided:
8. Business Benefits Realized:

**K. TECHNICAL REPRESENTATIVE.** The Technical Representative for this Contract is identified in the notice of award and is responsible for overseeing and monitoring this Contract.

**L. OTHER RFPs/CONTRACTS**

The City may release other RFPs for Application Development, Maintenance, and Support Services. The City reserves the option to “roll-up” and combine the services outlined in this agreement with an overall Citywide Application Development, Maintenance, and Support Services contract if the City determines that this would best meet the City’s Get It Done/Salesforce org needs. For the avoidance of doubt, should a “roll-up” of services occur, the prevailing rate for the services will be the lowest Salesforce development and support rates, as described in the agreements.

**M. PAYMENT CARD INDUSTRY DATA SECURITY DOCUMENTS**

**1. Contractor Certification.** Contractor certifies that it will implement and at all times comply with the most current Payment Card Industry Data Security Standards (PCI DSS) regarding data security. Contractor will provide written annual confirmation of PCI DSS compliance from the credit card types used by the City (i.e. VISA, MasterCard, Discover, and American Express). Contractor will immediately notify the City if it undergoes, or has reason to believe that it will undergo, an adverse change resulting in the loss of compliance with the PCI DSS standards and/or other material payment card industry standards. In addition, Contractor shall provide payment card companies, acquiring financial institutions, and their respective designees required access to the Contractor's facilities and all pertinent records as deemed necessary by the City to verify Contractor's compliance with the PCI DSS requirements.

**2. Data Security.** Contractor acknowledges responsibility for the security of cardholder data as defined within PCI DSS standards. Contractor shall undergo independent third party quarterly system scans that audit for all known methods hackers use to access private information, in addition to vulnerabilities that would allow malicious software (i.e., viruses and worms) to gain access to or disrupt network devices. Upon request, Contractor will provide the City’s Chief Information Security Officer with copies of the quarterly scans for verification. Contractor will provide reasonable care and efforts to detect fraudulent credit card activity in connection with credit card transactions processed during the performance of this Contract.

**3. Use of Data.** Contractor acknowledges and agrees that Contractor may only use cardholder data for completing the work as described in the Contract Specifications consistent with PCI DSS standards or applicable law. Contractor shall maintain and protect in accordance with all applicable laws and PCI DSS standards the security of all cardholder data when performing the Services.

**4. Notification Requirements.** Contractor shall immediately notify the City's Chief Information Security Officer of any breach, intrusion, or unauthorized card access to allow the proper PCI DSS breach notification process to commence. Contractor agrees to assume responsibility for informing all affected individuals in accordance with applicable law. All notifications and required compliance documents regarding PCI DSS shall be sent to:

Chief Information Security Officer  
1200 3rd Avenue, Suite 1800  
San Diego, CA 92101  
[Cybersecurity@sandiego.gov](mailto:Cybersecurity@sandiego.gov)  
619-533-4840

**5. Indemnity.** Contractor shall indemnify and hold harmless the City, its officers, and employees from and against any claims, loss, damages, or other harm related to a data security breach or Contractor's failure to maintain PCI DSS compliance standards.

EXHIBIT C  
REVISED



**THE CITY OF SAN DIEGO**

**MODIFIED GENERAL CONTRACT TERMS AND PROVISIONS**

**APPLICABLE TO DELOITTE CONSULTING LLP, SERVICES CONTRACT**

## ARTICLE I SCOPE AND TERM OF CONTRACT

**1.1 Scope of Contract.** The scope of contract between the City and a provider of goods and/or services (Contractor) is described in the Contract Documents. The Contract Documents are comprised of the Request for Proposal, Invitation to Bid, or other solicitation document (Solicitation); the successful bid or proposal; the letter awarding the contract to Contractor; the City's written acceptance of exceptions or clarifications to the Solicitation, if any; and these General Contract Terms and Provisions. Notwithstanding the inclusion of terms related to the provision of goods, the parties acknowledge and agree that this is a services contract and no goods will be provided hereunder.

**1.2 Effective Date.** A contract between the City and Contractor (Contract) is effective on the last date that the contract is signed by the parties and approved by the City Attorney in accordance with Charter section 40. Unless otherwise terminated, this Contract is effective until it is completed or as otherwise agreed upon in writing by the parties, whichever is the earliest. A Contract term cannot exceed five (5) years unless approved by the City Council by ordinance.

**1.3 Reserved.**

## ARTICLE II CONTRACT ADMINISTRATOR

**2.1 Contract Administrator.** The Purchasing Agent or designee is the Contract Administrator for purposes of this Contract, and has the responsibilities described in this Contract, in the San Diego Charter, and in Chapter 2, Article 2, Divisions 5, 30, and 32.

**2.1.1 Contractor Performance Evaluations.** The Contract Administrator will evaluate Contractor's performance as often as the Contract Administrator deems necessary throughout the term of the contract to confirm compliance with the requirements of the Contract. This evaluation will be based on objective, mutually agreed criteria including whether the services meet the requirements of this Contract, the timeliness of performance as compared to any firm performance dates contained in this Contract, and adherence to applicable laws, including prevailing wage and living wage. City will provide Contractors who receive an unsatisfactory rating with a copy of the evaluation and an opportunity to respond. City may consider final evaluations, including Contractor's response, in evaluating future proposals and bids for contract award.

**2.2 Notices.** Unless otherwise specified, in all cases where written notice is required under this Contract, service shall be deemed sufficient if the notice is personally delivered or deposited in the United States mail, with first class postage paid, attention to the Purchasing Agent. Proper notice is effective on the date of personal delivery or five (5) days after deposit in a United States postal mailbox unless provided otherwise in the Contract. Notices to the City shall be sent to:

Purchasing Agent  
City of San Diego, Purchasing and Contracting Division  
1200 3<sup>rd</sup> Avenue, Suite 200  
San Diego, CA 92101-4195

### ARTICLE III COMPENSATION

**3.1 Manner of Payment.** Contractor will be paid monthly, in arrears, for goods and/or services provided in accordance with the terms and provisions specified in the Contract.

**3.2 Invoices.**

**3.2.1 Invoice Detail.** Contractor's invoice must be on Contractor's stationary with Contractor's name, address, and remittance address if different. Contractor's invoice must have a date, an invoice number, a purchase order number, a description of the goods or services provided, and an amount due.

**3.2.2 Service Contracts.** Contractor must submit invoices for services to City by the 10<sup>th</sup> of the month following the month in which Contractor provided services. Invoices must include the address of the location where services were performed and the dates in which services were provided.

**3.2.3 Reserved.**

**3.2.4 Reserved.**

**3.2.5 Additional Work.** City will not pay Contractor for additional work unless Contractor receives prior written authorization from the Contract Administrator. Failure to do so may result in payment being withheld for any such additional services. If approved, Contractor will include an invoice that describes the work performed and the location where the work was performed, and a copy of the Contract Administrator's written authorization.

**3.2.6 Reporting Requirements.** Contractor must submit the following reports using the City's web-based contract compliance portal. Incomplete and/or delinquent reports may cause payment delays, non-payment of invoice, or both. For questions, please view the City's online tutorials on how to utilize the City's web-based contract compliance portal.

**3.2.6.1 Monthly Employment Utilization Reports.** Contractor and Contractor's subcontractors and suppliers must submit Monthly Employment Utilization Reports by the fifth (5<sup>th</sup>) day of the subsequent month.

**3.2.6.2 Monthly Invoicing and Payments.** Contractor and Contractor's subcontractors and suppliers must submit Monthly Invoicing and Payment Reports by the fifth (5<sup>th</sup>) day of the subsequent month.

**3.3 Annual Appropriation of Funds.** Contractor acknowledges that the Contract term may extend over multiple City fiscal years, and that work and compensation under this Contract is contingent on the City Council appropriating funding for and authorizing such work and compensation for those fiscal years. This Contract may be terminated upon written notice at the end of the fiscal year for which sufficient funding is not appropriated and authorized. City is not obligated to pay Contractor for any amounts beyond amounts for services performed through the effective date of termination.

**3.4 Price Adjustments.** Based on Contractor's written request and justification, the City may approve an increase in unit prices on Contractor's pricing pages consistent with the amount requested in the justification in an amount not to exceed the increase in the Consumer Price Index, San Diego Area, for All Urban Customers (CPI-U) as published by the Bureau of Labor Statistics, or 5.0%, whichever is less, during the preceding one year term. If the CPI-U is a negative number, then the unit prices shall not be adjusted for that option year (the unit prices will not be decreased). A negative CPI-U shall be counted against any subsequent increases in the CPI-U when calculating the unit prices for later option years. Contractor must provide such written request and justification no less than sixty days before the date in which City may exercise the option to renew the contract, or sixty days before the anniversary date of the Contract. Justification in support of the written request must include a description of the basis for the adjustment, the proposed effective date and reasons for said date, and the amount of the adjustment requested with documentation to support the requested change (e.g. CPI-U or 5.0%, whichever is less). City's approval of this request must be in writing.

## ARTICLE IV SUSPENSION AND TERMINATION

**4.1 City's Right to Suspend for Convenience.** City may suspend all or any portion of Contractor's performance under this Contract at its sole option and for its convenience for a reasonable period of time not to exceed six (6) months. City must first give ten (10) days' written notice to Contractor of such suspension. City will pay to Contractor a sum equivalent to the reasonable value of the goods and/or services satisfactorily provided up to the date of suspension. City may rescind the suspension prior to or at six (6) months by providing Contractor with written notice of the rescission, at which time Contractor would be required to resume performance in compliance with the terms and provisions of this Contract. Contractor will be entitled to an extension of time to complete performance under the Contract equal to the length of the suspension unless otherwise agreed to in writing by the Parties.

**4.2 City's Right to Terminate for Convenience.** City may, at its sole option and for its convenience, terminate all or any portion of this Contract by giving thirty (30) days' written notice of such termination to Contractor. The termination of the Contract shall be effective at the

expiration of such notice period. After termination of all or any portion of the Contract, Contractor shall: (1) immediately discontinue all affected performance (unless the notice directs otherwise); and (2) complete any and all additional work necessary for the orderly filing of documents and closing of Contractor's affected performance under the Contract. After filing of documents and completion of performance, Contractor shall deliver to City all data, drawings, specifications, reports, estimates, summaries, and such other information and materials created or received by Contractor in performing this Contract, whether completed or in process. By accepting payment for completion, filing, and delivering documents as called for in this section, Contractor discharges City of all of City's payment obligations and liabilities under this Contract with regard to the affected performance.

**4.3 City's Right to Terminate for Default.** Contractor's failure to satisfactorily perform any obligation required by this Contract constitutes a default. Examples of default include a determination by City that Contractor has: (1) failed to deliver goods and/or perform the services of the required quality or within the time specified; (2) failed to perform any of the obligations of this Contract.

**4.3.1** If Contractor fails to satisfactorily cure a default within ten (10) calendar days of receiving written notice from City specifying the nature of the default, City may immediately cancel and/or terminate this Contract, and terminate each and every right of Contractor, and any person claiming any rights by or through Contractor under this Contract.

**4.3.2** If City terminates this Contract, in whole or in part, City may procure, upon such terms and in such manner as the Purchasing Agent may deem appropriate, equivalent goods or services the City can seek, as direct damages, any excess fees (i.e., fees in excess of what City would otherwise have paid to Contractor pursuant to this Contract) that City is required to pay, and actually pays, to an alternative service provider to perform the terminated Services (or any portion(s) of such terminated Services) not performed by Contractor as of the effective date of termination. Contractor shall also continue performance to the extent not terminated.

**4.4 Termination for Bankruptcy or Assignment for the Benefit of Creditors.** If Contractor files a voluntary petition in bankruptcy, is adjudicated bankrupt, or makes a general assignment for the benefit of creditors, the City may at its option and upon written notice to Contractor, terminate this Contract.

**4.5 Contractor's Right to Payment Following Contract Termination.**

**4.5.1 Termination for Convenience.** If the termination is for convenience, Contractor shall be entitled to a fair and reasonable compensation for the services performed by the Contractor before the effective date of termination.

The parties further agree that they will in good faith work together to timely develop a mutually agreeable change order that articulates how the project shall close and the tasks required to close the project. The parties acknowledge the work provided (and associated changes, if any) under

such a change order is unknown and would not be known if and until termination under this section occurs.

Additionally, Contractor agrees to:

(a) Upon written request of the City and subject to agreement with the applicable third parties (which Contractor will make good faith efforts to obtain), assign to the City, or its designee, any third party contracts or licenses between Contractor and third parties used in connection with the Contract.

(b) Cooperate in good faith with the City to accomplish a timely disentanglement in accordance with the aforementioned change order;

(c) Where applicable, deliver to the City the hardware owned by the City and the software media for the third party software licenses owned by the City; and

(d) Perform Contractor's other obligations associated with termination as set forth in this Contract or the aforementioned change order, including but not limited to those obligations related to delivery of information and materials and the return and destruction

**4.5.2 Termination for Default.** If the termination is for default by Contractor, City shall pay Contractor for all undisputed amounts incurred up through the effective date of termination. If, after City gives notice of termination for failure to fulfill Contract obligations to Contractor, it is determined that Contractor had not so failed, the termination shall be deemed to have been effected for the convenience of City. In such event, City will pay Contractor in accordance with Section 4.5.1. City's rights and remedies are in addition to any other rights and remedies provided by law or under this Contract

**4.5.3 Termination in Part.** If the termination is in part, then prior to the effective date of termination, the parties shall execute a change order to reflect the remaining scope and associated equitable adjustment in the Contract price. No amount shall be allowed for anticipated profit on unperformed services, and no amount shall be paid for terminated services beyond the termination effective date.

**4.6 Remedies Cumulative.** City's remedies are cumulative and are not intended to be exclusive of any other remedies or means of redress to which City may be lawfully entitled in case of any breach or threatened breach of any provision of this Contract.

## **ARTICLE V ADDITIONAL CONTRACTOR OBLIGATIONS**

**5.1 Inspection and Acceptance.** The City will inspect and accept goods provided under this Contract at the shipment destination unless specified otherwise. Inspection will be made and

acceptance will be determined by the City department shown in the shipping address of the Purchase Order or other duly authorized representative of City.

**5.2 Responsibility for Lost or Damaged Shipments.** Contractor bears the risk of loss or damage to goods prior to the time of their receipt and acceptance by City. City has no obligation to accept damaged shipments and reserves the right to return damaged goods, at Contractor's sole expense, even if the damage was not apparent or discovered until after receipt.

**5.3 Limitation on Damages.** Contractor, its subsidiaries and subcontractors, and their respective personnel shall not be liable to the City for any claims, liabilities, or expenses relating to this agreement or the services ("claims") in excess of the aggregate to the total fees paid or payable under this agreement during the twenty-four (24) month period preceding the date on which the first claim arose (it being the understanding of the parties that identifying the "first" claim will establish the beginning point for such period), except that if such event arises during the first contract year, then such amount shall be equal to the estimated fees to be paid by client under this agreement during the first twenty-four (24) months of the term, and further provided that the limitations contained in this agreement upon the types and amounts of Contractor's liability shall not apply to the extent resulting from the recklessness, bad faith, gross negligence or intentional misconduct of Contractor or its subcontractors, or to claims subject to (or amounts payable by) Contractor pursuant to vendor's indemnification obligations hereunder. Except as otherwise provided in this agreement, in no event shall Contractor, its subsidiaries or subcontractors, or their respective personnel be liable to the City for any loss of, goodwill, revenues, or profits (whether or not deemed to constitute a direct claim), or any consequential, special, indirect, incidental, punitive, or exemplary loss, damage, or expense relating to this agreement or the services. In no case shall the City be liable to Contractor for an aggregate amount in excess of the fees paid by the City to the Contractor under this agreement and proportionate to any fault of the City, or the total price remaining to be paid on the agreement. This limitation does not limit Contractor's obligation to maintain any insurance coverage provided in this agreement. For purposes of this section, "gross negligence" shall mean a want of even scant care or extreme departure from the ordinary standard of conduct.

**5.4 Delivery.** To the extent there are any dates specified in the Contract Documents as "firm performance dates", delivery shall be made on the delivery day specified in the Contract Documents (or as otherwise agreed in the approved project schedule).

**5.5 Delay.** Contractor must promptly notify City in writing if there is, or it is anticipated that there will be, a delay in performance. The written notice must explain the cause for the delay and provide a reasonable estimate of the length of the delay. Notwithstanding anything to the contrary in Section 5.5.1, if there is an unreasonable delay in performance caused by City (including failure by City to meet its obligations under this Contract) or its other vendors or contractors, Contractor and City shall in good faith work together to timely develop a mutually agreeable change order to address the adverse impact of such event on Contractor, including with respect to schedule and pricing.

**5.5.1** If a delay in performance is caused by any unforeseen event(s) beyond the control of the parties, City may allow Contractor to a reasonable extension of time to complete performance, but Contractor will not be entitled to damages or additional compensation. Any such extension of time must be approved in writing by City. The following conditions may constitute such a delay: war; changes in law or government regulation; labor disputes; strikes; fires, floods, adverse weather or other similar condition of the elements necessitating cessation of the performance; inability to obtain materials, equipment or labor; or other specific reasons agreed to between City and Contractor. This provision does not apply to a delay caused by Contractor's acts or omissions. Contractor is not entitled to an extension of time to perform if a delay is caused by Contractor's inability to obtain materials, equipment, or labor unless City has received, in a timely manner, documentary proof satisfactory to City of Contractor's inability to obtain materials, equipment, or labor, in which case City's approval must be in writing.

**5.6 Restrictions and Regulations Requiring Contract Modification.** Contractor shall promptly notify City in writing of any regulations or restrictions that may or will require Contractor to alter the material, quality, workmanship, or performance of the goods and/or services to be provided. City reserves the right to accept any such alteration, including any resulting reasonable price adjustments, or to cancel the Contract at no expense to the City as set forth in Section 4.1 of this Agreement.

**5.7 Reserved.**

**5.8 Industry Standards.** Contractor shall provide services hereunder in conformance with the description of such services set forth in this Contract. Contractor shall also provide goods and/or services in accordance with the standards customarily adhered to by an experienced and competent provider of the goods and/or services called for under this Contract using the degree of care and skill ordinarily exercised by reputable providers of such goods and/or services. Where approval by City, the Mayor, or other representative of City is required, it is understood to be general approval only and does not relieve Contractor of responsibility for complying, to the extent applicable to Contractor in its performance of the Services, with all applicable laws, codes, policies, regulations, and good business practices.

**5.9 Records Retention and Examination.** Contractor shall retain, protect, and maintain in an accessible location all records and documents, including paper, electronic, and computer records, relating to this Contract for five (5) years after receipt of final payment by City under this Contract. Contractor shall make all such records and documents available for inspection, copying, or other reproduction, and auditing by authorized representatives of City, including the Purchasing Agent or designee. Contractor shall make available all requested data and records at reasonable locations within City or County of San Diego at any time during normal business hours, and as often as City deems necessary. If records are not made available within the City or County of San Diego, Contractor shall pay City's travel costs to the location where the records are maintained and shall pay for all related travel expenses. Failure to make requested records available for inspection, copying, or other reproduction, or auditing by the date requested may

result in termination of the Contract, in accordance with Section 4.3.1 of this Agreement. Contractor must include this provision in all subcontracts made in connection with this Contract

**5.9.1** Contractor shall maintain records of all subcontracts entered into with all firms providing services under this Agreement, and all project invoices received from Subcontractors and Suppliers, all purchases of materials and services from Suppliers in connection with the services they are providing under this Agreement.. Records shall show name, telephone number including area code, and business address of each Subcontractor and Supplier, and the total amount actually paid to each firm. Project relevant records, regardless of tier, may be periodically reviewed by the City.

**5.10 Quality Assurance Meetings.** Upon City's request, Contractor shall schedule one or more quality assurance meetings with City's Contract Administrator to discuss Contractor's performance. If requested, Contractor shall schedule the first quality assurance meeting no later than eight (8) weeks from the date of commencement of work under the Contract. At the quality assurance meeting(s), City's Contract Administrator will provide Contractor with feedback, will note any deficiencies in Contract performance, and provide Contractor with an opportunity to address and correct such deficiencies. The total number of quality assurance meetings that may be required by City will depend upon Contractor's performance.

**5.11 Duty to Cooperate with Auditor.** The City Auditor may, in his sole discretion, at no cost to the City, and for purposes of performing his responsibilities under Charter section 39.2, review Contractor's records to confirm contract compliance. Contractor shall make reasonable efforts to cooperate with Auditor's requests.

**5.12 Reserved.**

**5.13 Project Personnel.** Except as formally approved by the City, the key personnel identified in Contractor's bid or proposal shall be the individuals who will actually complete the work. Except in the event of disability, illness, grave personal circumstances or separation from service, changes in key personnel staffing must be reported in writing and approved by the City.

**5.13.1 Criminal Background Certification.** Contractor certifies that all employees working on this Contract have had a criminal background check and that said employees are clear of any sexual convictions. Contractor further certifies that all employees hired by Contractor or a subcontractor to perform the Services under this Contract shall be free from any felony convictions.

**5.13.2 Photo Identification Badge.** Contractor shall provide a company photo identification badge to any individual assigned by Contractor or subcontractor to perform services or deliver goods on City premises. Such badge must be worn at all times while on City premises. City reserves the right to require Contractor to pay fingerprinting fees for personnel assigned to work in sensitive areas. All employees shall turn in their photo identification badges to Contractor upon completion of services and prior to final payment of invoice.

**5.14 Standards of Conduct.** Contractor is responsible for maintaining professional standards of employee competence, conduct, courtesy, appearance, honesty, and integrity.

**5.14.1 Supervision.** Contractor shall provide adequate and competent supervision at all times during the Contract term. Contractor shall be readily available to meet with the City. Contractor shall provide the telephone numbers where its representative(s) can be reached.

**5.14.2 City Premises.** Contractor's employees and agents shall comply with all City rules and regulations while on City premises.

**5.14.3 Removal of Employees.** City may request Contractor immediately remove from assignment to the City any employee found unfit to perform duties at the City. Contractor shall comply with all such requests.

**5.15 Licenses and Permits.** Contractor shall, without additional expense to the City, be responsible for obtaining any necessary licenses, permits, certifications, accreditations, fees and approvals for complying with any federal, state, county, municipal, and other laws, codes, and regulations applicable to Contractor in its performance under this contract. This includes, but is not limited to, any laws or regulations requiring the use of licensed contractors to perform parts of the work.

**5.16 Contractor and Subcontractor Registration Requirements.** Prior to the award of the Contract, Contractor and Contractor's subcontractors and suppliers must register with the City's web-based vendor registration and bid management system. The City may not award the Contract until registration of all subcontractors and suppliers is complete. In the event this requirement is not met within the time frame specified by the City, the City reserves the right to rescind the Contract award and to make the award to the next responsive and responsible proposer of bidder.

## **ARTICLE VI INTELLECTUAL PROPERTY RIGHTS**

**6.1 Rights in Data.** If, in connection with the services performed under this Contract, Contractor or its employees, agents, or subcontractors, create artwork, audio recordings, blueprints, designs, diagrams, documentation, photographs, plans, reports, software, source code, specifications, surveys, system designs, video recordings, or any other original works of authorship, whether written or readable by machine exclusively for the City pursuant to this Agreement (Deliverable Materials), all rights of Contractor or its subcontractors in the Deliverable Materials, including, but not limited to publication, and registration of copyrights, and trademarks in the Deliverable Materials, are the sole property of City upon full payment to Contractor for such Deliverable Materials, except to the extent they include any Contractor Works. Contractor, including its employees, agents, and subcontractors, may not use any Deliverable Material (except any Contractor Works included therein) for purposes unrelated to Contractor's work on behalf of the City without prior written consent of City. Contractor may

not publish or reproduce any Deliverable Materials (except any Contractor Works included therein), for purposes unrelated to Contractor's work on behalf of the City, without the prior written consent of the City.

**6.2 Intellectual Property Rights Assignment.** Upon full payment, Contractor hereby assigns to City all of Contractor's rights, title, and interest in and to the content of the Deliverable Materials created by Contractor or its employees, agents, or subcontractors, including copyrights, in connection with the services performed under this Contract except to the extent they include any Contractor Works. Contractor shall promptly execute and deliver, and shall cause its employees, agents, and subcontractors to promptly execute and deliver, upon request by the City or any of its successors or assigns at any time and without further compensation of any kind, any power of attorney, assignment, application for copyright, patent, trademark or other intellectual property right protection, or other papers or instruments which may be necessary or desirable to fully secure, perfect or otherwise protect to or for the City, its successors and assigns, all right, title and interest in and to the content of the Deliverable Materials. Contractor also shall cooperate and assist in the prosecution of any action or opposition proceeding involving such intellectual property rights and any adjudication of those rights.

**6.3 Contractor Works.** Contractor Works means tangible and intangible information and material that: (a) had already been conceived, invented, created, developed or acquired by Contractor or its subcontractors prior to the effective date of this Contract; or (b) were conceived, invented, created, or developed by Contractor or its subcontractors after the effective date of this Contract as a tool for their use in performing the Services, plus any modifications or enhancements thereto and derivative works based thereon.. All Contractor Works, and all modifications or derivatives of such Contractor Works, including all intellectual property rights in or pertaining to the same, shall be owned solely and exclusively by Contractor. Upon full payment to Contractor under this Contract, and subject to the terms and conditions contained herein, Contractor hereby grants to City the right to use, for City's business purposes, any Contractor Works included in the Deliverable Materials in connection with its use of the Deliverable Materials.

**6.4 Subcontracting.** With the exception of Contractor Works, in the event that Contractor utilizes a subcontractor(s) for any portion of the work that comprises the whole or part of the specified Deliverable Materials to the City, the agreement between Contractor and the subcontractor shall include a statement that identifies the Deliverable Materials as a "works for hire" as described in the United States Copyright Act of 1976, as amended, and that all intellectual property rights in the Deliverable Materials, whether arising in copyright, trademark, service mark or other forms of intellectual property rights, belong to and shall vest solely with the City. Further, with the exception of Contractor Works, the agreement between Contractor and its subcontractor shall require that the subcontractor, if necessary, shall grant, transfer, sell and assign, free of charge, exclusively to City, all titles, rights and interests in and to the Deliverable Materials, including all copyrights, trademarks and other intellectual property rights. City shall have the right to review any such agreement for compliance with this provision.

**6.5 Intellectual Property Warranty and Indemnification.** Contractor represents and warrants that any materials or deliverables, including all Deliverable Materials, provided under this Contract are either original, or not encumbered, and do not infringe upon the copyright, trademark, patent or other intellectual property rights of any third party, or are in the public domain. If Deliverable Materials provided hereunder become the subject of a claim, suit or allegation of copyright, trademark or patent infringement, City shall have the right, in its sole discretion, to require Contractor to produce, at Contractor's own expense, new non-infringing materials, deliverables or works as a means of remedying any claim of infringement in addition to any other remedy available to the City under law or equity. Contractor further agrees to indemnify, defend, and hold harmless the City, its officers, employees and agents from and against any and all claims, actions, costs, judgments or damages, of any type, alleging or threatening that any Deliverable Materials, supplies, equipment, services or works provided under this contract infringe the copyright, trademark, patent or other intellectual property or proprietary rights of any third party (Third Party Claim of Infringement) except to the extent that such infringement or unauthorized use arises from, or could have been avoided except for (i) modification of such Deliverable Materials other than by Contractor or its subcontractors or use thereof in a manner not contemplated by the Contract, (ii) the failure of the indemnified party to use any corrections or modifications made available by Contractor, (iii) information, materials, instructions, specifications, requirements or designs provided by or on behalf of the indemnified party or (iv) the use of such Deliverable Materials in combination with any platform, product, network or data not provided by Contractor or otherwise contemplated by the scope of this engagement. In the event Contractor cannot reasonably procure, replace or modify such Deliverable Materials in accordance with the immediately preceding sentence, Contractor may require City to cease use of such Deliverable Materials and refund the professional fees paid to Contractor with respect to the Services giving rise to such Deliverable Materials. If a Third Party Claim of Infringement is threatened or made before Contractor receives payment under this Contract, City shall be entitled, upon written notice to Contractor, to withhold some or all of such payment.

**6.6 Software Licensing.** Contractor represents and warrants that it has not knowingly and without the City's approval installed into the software, if any, as delivered to City, any program code, virus, worm, trap door, back door, time or clock that would erase data or programming or otherwise cause the software to become inoperable, inaccessible, or incapable of being used in accordance with its user manuals, either automatically, upon the occurrence of licensor-selected conditions or manually on command.

**6.7 Publication.** Contractor may not publish or reproduce any Deliverable Materials (except for any Contractor Works included therein), for purposes unrelated to Contractor's work on behalf of the City without prior written consent from the City.

**6.8 Reserved.**

**ARTICLE VII  
INDEMNIFICATION AND INSURANCE**

**7.1 Indemnification.** With respect to any liability, claims asserted or costs, losses, or payments attributable to the claims of third parties for bodily or personal injury to any person or damage to real or tangible personal property caused or claimed to be caused by the acts or omissions of the Contractor, or Contractor’s employees, subcontractors, agents, and officers, arising out of any service performed under this Contract, the Contractor agrees to defend, indemnify, protect, and hold harmless the City, its agents, officers, and employees from and against all such liability. Contractor’s duty to defend, indemnify, protect and hold harmless shall not include any claims or liabilities arising from the sole negligence or willful misconduct of the City, its agents, officers or employees.

**7.2 Insurance.** Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by Contractor, his agents, representatives, employees or subcontractors.

Contractor shall provide, at a minimum, the following:

**7.2.1 Commercial General Liability.** Insurance Services Office Form CG 00 01 covering CGL on an “occurrence” basis, including products and completed operations, property damage, bodily injury, and personal and advertising injury with limits no less than \$1,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.

**7.2.2 Commercial Automobile Liability.** Insurance Services Office Form Number CA 0001 covering Code 1 (any auto) or, if Contractor has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than \$1,000,000 per accident for bodily injury and property damage.

**7.2.3 Workers' Compensation.** Insurance as required by the State of California, with Statutory Limits, and Employer’s Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.

**7.2.4 Professional Liability (Errors and Omissions).** For consultant contracts, insurance appropriate to Consultant’s profession, with limit no less than \$1,000,000 per occurrence or claim, \$2,000,000 aggregate.

If Contractor maintains broader coverage and/or higher limits than the minimums shown above, City requires and shall be entitled to the broader coverage and/or the higher limits maintained by Contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to City.

**7.2.5 Cyber Liability Insurance.** Insurance, with limits of not less than \$1,000,000 per claim, \$2,000,000 aggregate. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by contractor in this agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs arising out of Contractor's wrongful acts as well as credit monitoring expenses with limits sufficient to respond to these obligations.

**7.2.6 Other Insurance Provisions.** The insurance policies are to contain, or be endorsed to contain, the following provisions:

**7.2.6.1 Additional Insured Status.** The City, its officers, officials, employees, and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of Contractor including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to Contractor's insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used).

**7.2.6.2 Primary Coverage.** For any claims related to this contract, Contractor's insurance coverage shall be primary coverage at least as broad as ISO CG 20 01 04 13 as respects the City, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by City, its officers, officials, employees, or volunteers shall be excess of Contractor's insurance and shall not contribute with it.

**7.2.6.3 Notice of Cancellation.** Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to City.

**7.2.6.4 Waiver of Subrogation.** Contractor hereby grants to City a waiver of any right to subrogation which the Workers' Compensation insurer of said Contractor may acquire against City by virtue of the payment of any loss under such insurance unless prohibited by law. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City has received a waiver of subrogation endorsement from the insurer.

**7.2.6.5 Claims Made Policies (applicable only to professional liability).** The Retroactive Date must be shown, and must be before the date of the contract or the beginning of contract work. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, Contractor must purchase "extended

reporting” coverage for a minimum of five (5) years after completion of work subject to the continued availability of commercially reasonable terms and conditions for such coverage.

**7.3 Deductibles/Self Insured Retentions.** All deductibles on any policy shall be the sole responsibility of Contractor and shall be disclosed to City at the time the evidence of insurance is provided. Self-insured retentions must be declared to and approved by City. City may require Contractor to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or City.

**7.4 Acceptability of Insurers.** Insurance is to be placed with insurers with a current A.M. Best’s rating of no less than A-VI or the equivalent rating from a nationally recognized rating firm, unless otherwise acceptable to City.

City will accept insurance provided by non-admitted, “surplus lines” carriers only if the carrier is authorized to do business in the State of California and is included on the List of Approved Surplus Lines Insurers (LASLI list). All policies of insurance carried by non-admitted carriers are subject to all of the requirements for policies of insurance provided by admitted carriers described herein.

**7.5 Verification of Coverage.** Contractor shall furnish City with original certificates. All certificates and endorsements are to be received and approved by City before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive Contractor’s obligation to provide them.

**7.6 Special Risks or Circumstances.** City reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

**7.7 Additional Insurance.** Contractor may obtain additional insurance not required by this Contract.

**7.8 Excess Insurance.** All policies providing excess coverage to City shall follow the form of the primary policy or policies including but not limited to all endorsements.

**7.9 Subcontractors.** Contractor shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Contractor shall ensure that City is an additional insured on insurance required from subcontractors. For CGL coverage, subcontractors shall provide coverage with a format at least as broad as the CG 20 38 04 13 endorsement.

## ARTICLE VIII BONDS

**8.1 Payment and Performance Bond.** Prior to the execution of this Contract, City may require Contractor to post a payment and performance bond (Bond). The Bond shall guarantee Contractor's faithful performance of this Contract and assure payment to contractors, subcontractors, and to persons furnishing goods and/or services under this Contract.

**1.1.1 Bond Amount.** The Bond shall be in a sum equal to twenty-five percent (25%) of the Contract amount, unless otherwise stated in the Specifications. City may file a claim against the Bond if Contractor fails or refuses to fulfill the terms and provisions of the Contract.

**8.1.1 Bond Term.** The Bond shall remain in full force and effect at least until complete performance of this Contract and payment of all claims for materials and labor, at which time it will convert to a ten percent (10%) warranty bond, which shall remain in place until the end of the warranty periods set forth in this Contract. The Bond shall be renewed annually, at least sixty (60) days in advance of its expiration, and Contractor shall provide timely proof of annual renewal to City.

**8.1.2 Bond Surety.** The Bond must be furnished by a company authorized by the State of California Department of Insurance to transact surety business in the State of California and which has a current A.M. Best rating of at least "A-, VIII."

**8.1.3 Non-Renewal or Cancellation.** The Bond must provide that City and Contractor shall be provided with sixty (60) days' advance written notice in the event of non-renewal, cancellation, or material change to its terms. In the event of non-renewal, cancellation, or material change to the Bond terms, Contractor shall provide City with evidence of the new source of surety within twenty-one (21) calendar days after the date of the notice of non-renewal, cancellation, or material change. Failure to maintain the Bond, as required herein, in full force and effect as required under this Contract, will be a material breach of the Contract subject to termination of the Contract.

**8.2 Reserved.**

## ARTICLE IX CITY-MANDATED CLAUSES AND REQUIREMENTS

**9.1 Contractor Certification of Compliance.** By signing this Contract, Contractor certifies that Contractor is aware of, and will comply with, these City-mandated clauses throughout the duration of the Contract.

**9.1.1 Drug-Free Workplace Certification.** Contractor shall comply with City's Drug-Free Workplace requirements set forth in Council Policy 100-17, which is incorporated into the Contract by this reference.

**9.1.2 Contractor Certification for Americans with Disabilities Act (ADA) and State Access Laws and Regulations.** The following shall apply to the extent applicable to Contractor in its performance of the services hereunder. Contractor shall comply with all accessibility requirements under the ADA and under Title 24 of the California Code of Regulations (Title 24). When a conflict exists between the ADA and Title 24, Contractor shall comply with the most restrictive requirement (i.e., that which provides the most access). Contractor also shall comply with the City's ADA Compliance/City Contractors requirements as set forth in Council Policy 100-04, which is incorporated into this Contract by reference. Contractor warrants and certifies compliance with all federal and state access laws and regulations and further certifies that any subcontract agreement for this contract contains language which indicates the subcontractor's agreement to abide by the provisions of the City's Council Policy and any applicable access laws and regulations.

**9.1.3 Non-Discrimination Requirements.**

**9.1.3.1 Compliance with City's Equal Opportunity Contracting Program (EOCP).** Contractor shall comply with City's EOCP Requirements. Contractor shall not discriminate against any employee or applicant for employment on any basis prohibited by law. Contractor shall provide equal opportunity in all employment practices. Prime Contractors shall ensure that their subcontractors comply with this program. Nothing in this Section shall be interpreted to hold a Prime Contractor liable for any discriminatory practice of its subcontractors.

**9.1.3.2 Non-Discrimination Ordinance.** Contractor shall not discriminate on the basis of race, gender, gender expression, gender identity, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring or treatment of subcontractors, vendors or suppliers. Contractor shall provide equal opportunity for subcontractors to participate in subcontracting opportunities. Contractor understands and agrees that violation of this clause shall be considered a material breach of the Contract and may result in Contract termination, debarment, or other sanctions. Contractor shall ensure that this language is included in contracts between Contractor and any subcontractors, vendors and suppliers.

**9.1.3.3 Compliance Investigations.** Upon City's request, Contractor agrees to provide to City, within sixty calendar days, a truthful and complete list of the names of all subcontractors, vendors, and suppliers that Contractor has used in the past five years on any of its contracts that were undertaken within San Diego County, including the total dollar amount paid by Contractor for each subcontract or supply contract. Contractor further agrees to fully cooperate in any investigation conducted by City pursuant to City's Nondiscrimination in Contracting Ordinance. Contractor understands and agrees that violation of this clause shall be considered a material breach of the Contract and may result in Contract termination, debarment, and other sanctions.

**9.1.4 Equal Benefits Ordinance Certification.** Unless an exception applies, Contractor shall comply with the Equal Benefits Ordinance (EBO) codified in the San Diego Municipal Code (SDMC). Failure to maintain equal benefits is a material breach of the Contract.

**9.1.5 Contractor Standards.** Contractor shall comply with Contractor Standards provisions codified in the SDMC. Contractor understands and agrees that violation of Contractor Standards may be considered a material breach of the Contract and may result in Contract termination, debarment, and other sanctions.

**9.1.6 Noise Abatement.** Contractor shall operate, conduct, or construct without violating the City's Noise Abatement Ordinance codified in the SDMC.

**9.1.7 Storm Water Pollution Prevention Program.** Contractor shall comply with the City's Storm Water Management and Discharge Control provisions codified in Division 3 of Chapter 4 of the SDMC, as may be amended, and any and all applicable Best Management Practice guidelines and pollution elimination requirements in performing or delivering services at City owned, leased, or managed property, or in performance of services and activities on behalf of City regardless of location.

**9.1.7.1** Contractor shall comply with the City's Jurisdictional Urban Runoff Management Plan encompassing Citywide programs and activities designed to prevent and reduce storm water pollution within City boundaries as adopted by the City Council on January 22, 2008, via Resolution No. 303351, as may be amended.

**9.1.7.2** Contractor shall comply with each City facility or work site's Storm Water Pollution Prevention Plan, as applicable, and institute all controls needed while completing the services to minimize any negative impact to the storm water collection system and environment.

**9.1.8 Service Worker Retention Ordinance.** If applicable, Contractor shall comply with the Service Worker Retention Ordinance (SWRO) codified in the SDMC.

**9.1.9 Product Endorsement.** Contractor shall comply with Council Policy 000-41 concerning product endorsement which requires that any advertisement referring to City as a user of a good or service will require the prior written approval of the Mayor.

**9.1.10 Business Tax Certificate.** Unless the City Treasurer determines in writing that a contractor is exempt from the payment of business tax, any contractor doing business with the City of San Diego is required to obtain a Business Tax Certificate (BTC) and to provide a copy of its BTC to the City before a Contract is executed.

**9.1.11 Equal Pay Ordinance.** Unless an exception applies, Contractor shall comply with the Equal Pay Ordinance codified in San Diego Municipal Code sections 22.4801 through 22.4809. Contractor shall certify in writing that it will comply with the requirements of the EPO.

**9.1.11.1 Contractor and Subcontract Requirement.** The Equal Pay Ordinance applies to any subcontractor who performs work on behalf of a Contractor to the same extent as it would apply to that Contractor. Any Contractor subject to the Equal Pay Ordinance

shall require all of its subcontractors to certify compliance with the Equal Pay Ordinance in its written subcontracts.

## **ARTICLE X CONFLICT OF INTEREST AND VIOLATIONS OF LAW**

**10.1 Conflict of Interest Laws.** Contractor is subject to all federal, state and local conflict of interest laws, regulations, and policies applicable to public contracts and procurement practices including, but not limited to, California Government Code sections 1090, *et. seq.* and 81000, *et. seq.*, and the Ethics Ordinance, codified in the SDMC in all cases to the extent applicable to Contractor in its performance of the Services hereunder. If Contractor is required by law to do so, Contractor must complete one or more statements of economic interest disclosing relevant financial interests. Upon City's request, Contractor shall submit the necessary documents to City.

**10.2 Contractor's Responsibility for Employees and Agents.** Contractor is required to establish and make known to its employees and agents appropriate safeguards to prohibit employees from using their positions for a purpose that is, or that gives the appearance of being, motivated by the desire for private gain for themselves or others, particularly those with whom they have family, business or other relationships.

**10.3 Contractor's Financial or Organizational Interests.** In connection with any task, Contractor shall not recommend or specify any product, supplier, or contractor with whom Contractor has a direct or indirect financial or organizational interest or relationship that would violate conflict of interest laws, regulations, or policies.

**10.4 Certification of Non-Collusion.** Contractor certifies that: (1) Contractor's bid or proposal was not made in the interest of or on behalf of any person, firm, or corporation not identified; (2) Contractor did not directly or indirectly induce or solicit any other bidder or proposer to put in a sham bid or proposal; (3) Contractor did not directly or indirectly induce or solicit any other person, firm or corporation to refrain from bidding; and (4) Contractor did not seek by collusion to secure any advantage over the other bidders or proposers.

**10.5 Hiring City Employees.** This Contract shall be unilaterally and immediately terminated by City if Contractor employs an individual who within the twelve (12) months immediately preceding such employment did in his/her capacity as a City officer or employee participate in negotiations with or otherwise have an influence on the selection of Contractor.

## **ARTICLE XI DISPUTE RESOLUTION**

**11.1 Mediation.** If a dispute arises out of or relates to this Contract and cannot be settled through normal contract negotiations, Contractor and City shall use mandatory non-binding mediation before having recourse in a court of law.

**11.2 Selection of Mediator.** A single mediator that is acceptable to both parties shall be used to mediate the dispute. The mediator will be knowledgeable in the subject matter of this Contract, if possible.

**11.3 Expenses.** The expenses of witnesses for either side shall be paid by the party producing such witnesses. All other expenses of the mediation, including required traveling and other expenses of the mediator, and the cost of any proofs or expert advice produced at the direct request of the mediator, shall be borne equally by the parties, unless they agree otherwise.

**11.4 Conduct of Mediation Sessions.** Mediation hearings will be conducted in an informal manner and discovery will not be allowed. The discussions, statements, writings and admissions will be confidential to the proceedings (pursuant to California Evidence Code sections 1115 through 1128) and will not be used for any other purpose unless otherwise agreed by the parties in writing. The parties may agree to exchange any information they deem necessary. Both parties shall have a representative attend the mediation who is authorized to settle the dispute, though City's recommendation of settlement may be subject to the approval of the Mayor and City Council. Either party may have attorneys, witnesses or experts present.

**11.5 Mediation Results.** Any agreements resulting from mediation shall be memorialized in writing. The results of the mediation shall not be final or binding unless otherwise agreed to in writing by the parties. Mediators shall not be subject to any subpoena or liability, and their actions shall not be subject to discovery.

## **ARTICLE XII MANDATORY ASSISTANCE**

**12.1 Mandatory Assistance.** If a third party dispute or litigation, or both, arises out of, or relates in any way to the services provided to the City under a Contract, Contractor, its agents, officers, and employees agree to assist in resolving the dispute or litigation upon City's request. Contractor's assistance includes, but is not limited to, providing professional consultations, attending mediations, arbitrations, depositions, trials or any event related to the dispute resolution and/or litigation.

Contractor may decline to provide assistance if such assistance would result in a Conflict of Interest or if it would render Contractor in violation of applicable laws or if it would render Contractor in violation of specifically identified professional rules or regulations so long as Contractor in good faith makes efforts to provide reasonable assistance through other means acceptable to the City.

**12.2 Compensation for Mandatory Assistance.** City will compensate Contractor for fees incurred for providing Mandatory Assistance. If, however, the fees incurred for the Mandatory Assistance are determined, through resolution of the third party dispute or litigation, or both, to be attributable in whole, or in part, to the acts or omissions of Contractor, its agents, officers, and employees, Contractor shall reimburse City for all fees paid to Contractor, its agents, officers, and employees for Mandatory Assistance.

**12.3 Attorneys' Fees Related to Mandatory Assistance.** In providing City with dispute or litigation assistance, Contractor or its agents, officers, and employees may incur expenses and/or costs. Contractor agrees that any attorney fees it may incur as a result of assistance provided under Section 12.2 are not reimbursable.

### **ARTICLE XIII MISCELLANEOUS**

**13.1 Headings.** All headings are for convenience only and shall not affect the interpretation of this Contract.

**13.2 Non-Assignment.** Contractor may not assign the obligations under this Contract, whether by express assignment or by sale of the company, nor any monies due or to become due under this Contract, without City's prior written approval. Any assignment in violation of this paragraph shall constitute a default and is grounds for termination of this Contract at the City's sole discretion. In no event shall any putative assignment create a contractual relationship between City and any putative assignee.

**13.3 Independent Contractors.** Contractor and any subcontractors employed by Contractor are independent contractors and not agents of City. Any provisions of this Contract that may appear to give City any right to direct Contractor concerning the details of performing or providing the goods and/or services, or to exercise any control over performance of the Contract, shall mean only that Contractor shall follow the direction of City concerning the end results of the performance.

**13.4 Subcontractors.** Contractor shall be responsible for the work performed by all persons assigned to perform any work related to this Contract, including any subcontractors, to the same extent Contractor would be responsible under this Contract.

**13.5 Covenants and Conditions.** All provisions of this Contract expressed as either covenants or conditions on the part of City or Contractor shall be deemed to be both covenants and conditions.

**13.6 Compliance with Controlling Law.** Contractor shall comply with all applicable local, state, and federal laws, regulations, and policies. Contractor's act or omission in violation of applicable local, state, and federal laws, regulations, and policies may be grounds for contract termination. In addition, Contractor may be subject to suspension, debarment, or both.

**13.7 Governing Law.** The Contract shall be deemed to be made under, construed in accordance with, and governed by the laws of the State of California without regard to the conflicts or choice of law provisions thereof.

**13.8 Venue.** The venue for any suit concerning solicitations or the Contract, the interpretation of application of any of its terms and conditions, or any related disputes shall be in the County of San Diego, State of California.

**13.9 Successors in Interest.** This Contract and all rights and obligations created by this Contract shall be in force and effect whether or not any parties to the Contract have been succeeded by another entity, and all rights and obligations created by this Contract shall be vested and binding on any party's successor in interest.

**13.10 No Waiver.** No failure of either City or Contractor to insist upon the strict performance by the other of any covenant, term or condition of this Contract, nor any failure to exercise any right or remedy consequent upon a breach of any covenant, term, or condition of this Contract, shall constitute a waiver of any such breach of such covenant, term or condition. No waiver of any breach shall affect or alter this Contract, and each and every covenant, condition, and term hereof shall continue in full force and effect without respect to any existing or subsequent breach.

**13.11 Severability.** The unenforceability, invalidity, or illegality of any provision of this Contract shall not render any other provision of this Contract unenforceable, invalid, or illegal.

**13.12 Drafting Ambiguities.** The parties acknowledge that they have the right to be advised by legal counsel with respect to the negotiations, terms and conditions of this Contract, and the decision of whether to seek advice of legal counsel with respect to this Contract is the sole responsibility of each party. This Contract shall not be construed in favor of or against either party by reason of the extent to which each party participated in the drafting of the Contract.

**13.13 Amendments.** Neither this Contract nor any provision hereof may be changed, modified, amended or waived except by a written agreement executed by duly authorized representatives of City and Contractor. Any alleged oral amendments have no force or effect. The Purchasing Agent must sign all Contract amendments.

**13.14 Conflicts Between Terms.** If this Contract conflicts with an applicable local, state, or federal law, regulation, or court order, applicable local, state, or federal law, regulation, or court order shall control. Varying degrees of stringency among the main body of this Contract, the exhibits or attachments, and laws, regulations, or orders are not deemed conflicts, and the most stringent requirement shall control. Each party shall notify the other immediately upon the identification of any apparent conflict or inconsistency concerning this Contract.

**13.15 Survival of Obligations.** All representations, indemnifications, limitations on damages, payment obligations, warranties, and guarantees made in, required by, or given in accordance with this Contract, as well as all continuing obligations indicated in this Contract, shall survive, completion and acceptance of performance and termination, expiration or completion of the Contract.

**13.16 Confidentiality of Services.** All services performed by Contractor, and any sub-contractor(s) if applicable, including but not limited to all drafts, data, information, correspondence, proposals, reports of any nature, estimates compiled or composed by Contractor, pursuant to this Contract are for the sole use of City, its agents, and employees. Neither the documents nor their contents shall be released by Contractor or any subcontractor to any third party without the prior written consent of City. This provision does not apply to information that: (1) was publicly known, or otherwise known to Contractor, at the time it was disclosed to Contractor by City; (2) subsequently becomes publicly known through no act or omission of Contractor; or (3) otherwise becomes known to Contractor other than through disclosure by City.

**13.17 Insolvency.** If Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary, Contractor agrees to furnish, by certified mail or electronic commerce method authorized by the Contract, written notification of the bankruptcy to the Purchasing Agent and the Contract Administrator responsible for administering the Contract. This notification shall be furnished within a reasonable period of time following the initiation of the proceedings relating to bankruptcy filing. This notification shall include the date on which the bankruptcy petition was filed, the identity of the court in which the bankruptcy petition was filed, and a listing of City contract numbers and contracting offices for all City contracts against which final payment has not been made. This obligation remains in effect until final payment is made under this Contract.

**13.18 No Third Party Beneficiaries.** Except as may be specifically set forth in this Contract, none of the provisions of this Contract are intended to benefit any third party not specifically referenced herein. No party other than City and Contractor shall have the right to enforce any of the provisions of this Contract.

**13.19 Actions of City in its Governmental Capacity.** Nothing in this Contract shall be interpreted as limiting the rights and obligations of City in its governmental or regulatory capacity.

# City of San Diego

## Price Schedule

EXHIBIT D  
REVISED

Note: Please fill out only applicable fields

Section 1A: Support Services						
	% Time On-Site	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Staffing Resources - Provide details regarding role and any Salesforce certifications, implementation, and maintenance experience in RFP response.</b>						
Lead Engagement Partner	1%	\$ 11,956	\$ 12,434			
Engagement Manager	5%	\$ 22,628	\$ 23,533			
Support Team Lead	100%	\$ 367,667	\$ 382,374			
SFDC Developer/Front End 1	0%	\$ 66,654	\$ 69,320			
SFDC Developer 1	0%	\$ 66,654	\$ 69,320			
SFDC Developer/QA 1	0%	\$ 66,654	\$ 69,320			
SUBTOTAL		\$ 602,212	\$ 626,300	\$ -	\$ -	\$ -
<b>Section 1B: Project Enhancement/Expansion Team</b>						
Staffing Resources - Provide details regarding role and any Salesforce certifications, implementation, and maintenance experience in RFP response.						
Lead Engagement Partner	1%	\$ 11,956	\$ 12,434			
Enhancement/Expansion Team Lead	100%	\$ 185,472	\$ 192,891			
SFDC Developer/Front End 2	0%	\$ 66,654	\$ 69,320			
SFDC Developer 2	0%	\$ 66,654	\$ 69,320			
SFDC Developer/QA 2	0%	\$ 66,654	\$ 69,320			
SUBTOTAL		\$ 397,388	\$ 413,284	\$ -	\$ -	\$ -

# City of San Diego

## Price Schedule

Note: Please fill out only applicable fields

	One-Time					Year 1						
<b>Total Support Services &amp; Project Enhancement</b>	\$	-	\$	999,600.00	\$	1,039,584.00	\$	-	\$	-	\$	-
<b>Section 2: Transition/Knowledge Transfer</b>												
<i>Describe tasks and associated costs for knowledge transfer to support of the platform. Provide additional detail in RFP response.</i>												
Not Applicable	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
<b>Total Transitioning Costs</b>	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
<b>TOTAL COSTS</b>	\$	-	\$	999,600	\$	1,039,584	\$	-	\$	-	\$	-

### Section 2: Rate Card

	Year 1 Hourly Rate	Year 2 Hourly Rate	Year 3 Hourly Rate	Year 4 Hourly Rate	Year 5 Hourly Rate
<i>The following rates will be used to price resources used on discretionary projects created via a separate Purchase Order.</i>					
List Job Titles below. Describe positions and role in RFP response.					
Principal	\$ 280.63	\$ 291.86			
Senior Manager	\$ 247.38	\$ 257.28			
Manager	\$ 230.09	\$ 239.29			
Senior Consultant	\$ 202.16	\$ 210.25			
Consultant	\$ 174.23	\$ 181.20			
BTA	\$ 158.27	\$ 164.60			
OS Manager	\$ 54.00	\$ 56.16			
OS Senior Consultant	\$ 37.00	\$ 38.48			
OS Consultant	\$ 31.00	\$ 32.24			
OS BTA	\$ 24.00	\$ 24.96			
	\$ -	\$ -			

# CITY OF SAN DIEGO

## PURCHASING & CONTRACTING DEPARTMENT

1200 Third Avenue, Suite 200

San Diego, CA 92101-4195

Fax: (619) 236-5904

### ADDENDUM A

Request for Proposal (RFP), 10089580-20-J

**Closing Date: October 21, 2019**  
@ 2:00 p.m.

#### **Bid for furnishing the City of San Diego with Get It Done/Salesforce Platform Application Development, Maintenance, and Support**

The following changes to the specifications are hereby made effective as though they were originally shown and/or written:

1. Remove the original cover sheet and replace with the attached Addendum A cover sheet. (**NOTE:** Changes are made in **bold** font.)
2. Remove the original RFP, Signature Page (pg 3 of 9) and replace with the attached Addendum A, Signature Page.
3. Add fifty-one (51) pages “Questions and Answers” including attachments. (**NOTE:** The questions and answers are being provided for informational purposes only, and are not part of any resulting contract from this RFP.)

CITY OF SAN DIEGO PURCHASING & CONTRACTING DEPARTMENT

Janet Polite  
Senior Procurement Contracting Officer  
(619) 236-7017

October 7, 2019

## **RFP 10089580-20-J, Get It Done/Salesforce Platform Application Development, Maintenance, and Support Questions and Answers**

**Question 1:** Can you share the Support ticket log, including priority and complexity (if available) for the last 6 months. Please also share any other relevant categorization if available (eg. Department).

Response: Refer to Attachment 1.

**Question 2:** In the absence of this ticket dump, please provide us with the following data on the tickets/month data:

- i. % of Severity 1, 2, 3 calls
- ii. What is the % breakup of support tickets across business areas?
- iii. What is the % breakup of support tickets in terms of complexity – Simple, Medium & Complex?

Response: See Attachment 1.

**Question 3:** How often do you release enhancements and defects into production? How many Salesforce sandboxes are used? What is the type of sandboxes? Do you use any tools for defect/enhancement tracking, deployment and/or CI/CD tools?

Response: We are using one full sandbox and multiple development sandboxes. Changes are typically released to Production every two weeks using Salesforce change sets. We utilize Agile Accelerator for change request tracking and ServiceNow for incident tracking.

**Question 4:** Can you provide the list of enhancements done over the last six months (department breakup and priority/complexity) will be helpful?

Response: See Attachment 1.

**Question 5:** Can you confirm Salesforce is currently being used by 12 departments? Can you confirm the number of internal department users by Department?

Response: Salesforce is used by multiple departments. Please refer to Exhibit B, Section B for a breakdown of departments utilizing Salesforce. We are not currently providing a breakdown of users by department.

**Question 6:** Can you confirm that the major functions are Service Cloud with Case Management, Assignments, Queues and Knowledge?

Response: See Attachment 2

**Question 7: Communication Department - Can you provide information on the number of knowledge articles for the Communication Department? Have you enabled Lightning Knowledge?**

Response: Lightning Knowledge is not enabled. We currently have approximately 40 knowledge articles.

**Question 8: Communication Department - What kind of community site is used if public knowledge is implemented?**

Response: Salesforce Community pages are available to the public at <https://getitdone.force.com> which can be accessed from the City's public website at <https://www.sandiego.gov/get-it-done>.

**Question 9: DoIT - Is DoIT using the older customer portal or the newer customer community? Can you elaborate on what template was used for the website?**

Response: See Question 8.

**Question 10: DoIT - Do users have to register for the website or is it a public site?**

Response: The website is public and no registration is required; however, a login option is available.

**Question 11: DoIT - Can you approximate the number of pages?**

Response: We have approximately 309 Visualforce pages.

**Question 12: DoIT - What are the major functions that customers can do?**

Response: Please refer to Exhibit B, Section B for a general summary. For information on what services are available to the public, please visit <https://www.sandiego.gov/get-it-done>

**Question 13: DSD - What is the source of the intake? What is Integration with Accela?**

Response: The DSD Code Enforcement service request types are not currently available to the public. The source of the intake would be via web site and mobile app once live. Accela integration will be added as a change request and it will be a web service-based integration, likely synchronous. (DSD Code Enforcement currently receives internal referrals within the Get It Done system.)

**Question 14: DSD - What is the major function that customer/internal user do?**

Response: If this service request was live, the external customer would be able to report private property problems which are handled by the Development Services Department Code Enforcement division.

**Question 15: ESD - Are the major functions, mapping, appointments and customer service ticket management?**

Response: Please refer to Exhibit B, Section B for a general summary. For information on what services are available to the public, please visit <https://www.sandiego.gov/get-it-done>.

**Question 16: ESD - Are you using any payment gateways for payment and collection services?**

Response: Yes, we utilize a City-owned Payment Gateway maintained by a separate City vendor.

**Question 17: ESD - Are you using Salesforce and/or any other Field Service product?**

Response: Yes, Salesforce is utilized. Field Service is not.

**Question 18: Office of City Attorney - Are you using Case Management for Research functions?**

Response: No.

**Question 19: Office of City Clerk - Are you using any scheduling and appointment Salesforce AppExchange products and/or is it custom built application?**

Response: It is custom built.

**Question 20: Office of City Treasurer - Are you using any payment gateway?**

Response: Yes.

**Question 21: Office of City Treasurer - Is the solution PCI compliant?**

Response: Yes.

**Question 22: Parks & Recreation - Is Case Management being used?**

Response: Yes. Parks & Recreation utilizes case management for open space code enforcement.

**Question 23: Panda - What are the major functions/features for this solution?**

Response: System Administration, Reporting and Knowledge Administration

**Question 24: PUD - Can you provide more details on the specified program? How is this implemented in Salesforce?**

Response: PUD utilizes Get It Done for administering the FEWD (Food Establishment Wastewater Discharge) program:  
<https://www.sandiego.gov/public-utilities/sewer-spill-reduction/fewd>.

**Question 25: TSW - Can you provide more details on this department's usage? Are they using Service Cloud?**

Response: Yes, TSW is using Service Cloud. TSW utilizes the solution for various functions identified in Exhibit "B" section "B".

**Question 26: TSW - What kind of app is running on the mobile tablet? How is this app integrating with Salesforce if applicable?**

Response: Native Salesforce app with custom visualforce pages (no integration).

**Question 27: SDPD - Please provide high function/features implemented? Are you using Salesforce AppExchange or is it custom?**

Response: This department does not utilize the Salesforce AppExchange. SDPD utilizes Salesforce primarily for case management and code enforcement-related functionality.

**Question 28: Can you provide the # of custom objects and their names?**

Response: See Question 6.

**Question 29: Can you provide the # of AppExchange Apps and the names?**

Response: Dataloader Bulk  
Dataloader Partner  
Salesforce for Android  
Salesforce for iOS  
SalesforceA for iOS  
Workbench

**Question 30: Can you provide the # of apex, visualforce and lightning if applicable?**

Response: 1,170 Apex Classes, 183 Apex Triggers, 309 Visualforce pages.

**Question 31: Can you provide the Org size for records and unstructured data such as files etc.?**

Response: Storing approximately 40GB of files

**Question 32: Can you provide information about the application and technology used for integrations?**

Response: Other than two batch-based integration involving GIS data, all current integrations are web service based. See Exhibit B, section C for list of integrations.

**Question 33: Total number of batch jobs if any to be monitored?**

Response: There are no traditional batch jobs running on platforms outside of Salesforce. There are multiple processes that are scheduled and running on Salesforce and installed packages, such as time-based workflows.

**Question 34: Kindly provide information on inflight projects/enhancements which are targeted to be rolled out in next 3 -6 months which need high support coverage.**

Response: Typically, between 80-100 change requests (incidents/enhancements) are in-flight.

**Question 35: Do you have documentation, process manuals etc. for this project?**

Response: Limited documentation is available.

**Question 36: How many different support centers do we need to cover?**

Response: Refer to Exhibit B, Section B for an overview of participating departments.

**Question 37: Do end customers use web and mobile?**

Response: Yes.

**Question 38: Is the mobile being delivered using a custom app or is it responsive browser app?**

Response: The mobile application is provided by a third-party vendor, Connected Bits LLC. The Salesforce-hosted pages are mobile responsive.

**Question 39: Is customer community experience highly customized?**

Response: Yes.

**Question 40: Can the client provide a demo of the current applications?**

Response: Once a vendor is selected, the expectation is that this would be completed during the knowledge transfer process.

**Question 41: What type of incidents require 24/7 support? Please provide examples and details on response time requirements for issue acknowledgment and issue resolution.**

Response: Refer to Exhibit B, Section E.

**Question 42: Please describe the level of development customization work performed on the current ORG (i.e. custom objects, automations, custom workflows).**

Response: The City's Salesforce org contains both out-of-the-box functionality as well as very custom, complex visualforce pages, objects, automations, and workflows. For example, we have 175 custom objects, 66 custom settings, 25 custom metadata types, 72 Process Builder processes, 99 custom report types, 145 Workflow Rules, 196 rules, 183 apex triggers, 1,170 apex classes, 14 custom apps, 55 active flows, 96 custom tabs, 309 visualforce pages.

**Question 43: Does the scope of work include any known new integrations to be developed?**

Response: No, however new integrations may be established as described in Exhibit B, Sections F and H.

**Question 44: What are the qualifications, expected role and activities for the baseline support team full-time on-site resource?**

Response: In addition to what is indicated in Exhibit "B", including but not limited to the following:

- i. Prioritize and manage backlog
- ii. Track and report on development progress
- iii. Ensure quality of work
- iv. Communicate with City staff for testing and user acceptance
- v. Be the foremost expert on system
- vi. Be able to answer questions about implementation
- vii. Provide guidance on level of effort for changes
- viii. Point of Contact for vendor's development team and any off-site employees

**Question 45: Please provide an estimated team size for the Enhancement/expansion team.**

Response: The initial estimate for the Enhancement team is between 4 and 6 members. However, the vendor will be responsible for providing a standard for developing hourly estimates for change requests and the method for tracking and reporting on the agreed-on number of hours against the pool of available hours to make sure the team is fully utilized.

**Question 46: Please provide an estimated monthly work volume (hours) for the baseline support team.**

Response: The initial estimate for the team is between 4 and 6 members. The primary responsibility of the team is to fix incidents within the SLA framework. The remaining time should be utilized for completing change requests using the same benchmark methodology as agreed on for the Enhancement team

**Question 47: What are the qualifications, expected role and activities for the Enhancement/expansion team full-time on-site resource?**

Response: The qualifications, expected role and activities are as follows:

- i. Prioritize and manage backlog
- ii. Track and report on development progress
- iii. Ensure quality of work
- iv. Communicate with City staff for testing and user acceptance
- v. Be the foremost expert on system
- vi. Be able to answer questions about implementation
- vii. Provide guidance on level of effort for changes
- viii. Point of Contact for vendor's development team and any off-site employees

**Question 48: Please provide an estimated team size for the Enhancement/expansion team.**

Response: See Questions 45 and 46.

**Question 49: Please provide an estimated monthly work volume (hours) for the Enhancement/expansion team.**

Response: See Questions 45 and 46.

**Question 50: Should the Enhancement/expansion team consider a turnkey approach for solution delivery that includes all roles? or will some roles (i.e.**

**Business Analyst) be covered by City staff? If that is the case, please list which roles will be covered by City staff.**

Response: City staff will provide Business Analyst support to assist with finalizing requirements identified as part of change requests and user acceptance testing.

**Question 51: Implementation - Please provide the userbase details for of Get it Done system. How are they spread across Geographies?**

Response: Get It Done system users are located throughout the City of San Diego. Employees are located at various locations throughout the City.

**Question 52: Implementation - Please provide the license info of Get it Done instance?**

Response: See Question 5.

**Question 53: Implementation - Is Salesforce hosting all the knowledge Base or is there any external system hosting the knowledge?**

Response: Yes, Salesforce hosts the knowledge base. There is not an external system hosting knowledge.

**Question 54: Implementation - Is this classic or Lightning implementation?**

Response: Classic.

**Question 55: Implementation - Are all thee integrations point to point? Are there any middleware platforms being used?**

Response: Integrations are point-to-point. No middleware platforms are being used.

**Question 56: Implementation - Are there any App Exchange products being used in the current system? If yes, what are those and what would be the user base for those? Does city expect the product and licensing support for those products and renewals?**

Response: No. See Question 29 for the answer to the first part of this question.

**Question 57: Implementation - Are there any reporting tools/platforms being used?**

Response: Salesforce Reporting is in use.

**Question 58: Implementation - Are there any SFDC communities or portal being used in the current system?**

Response: Yes, see <https://getitdone.force.com>.

**Question 59: Transition - In which region is the Incumbent Vendor's present?**

Response: The current vendor has an office in downtown San Diego.

**Question 60: Transition - Are there any support work carried out by Incumbent vendor from their near shore delivery center?**

Response: Support work is performed in-house and offshore by the current vendor.

**Question 61: Transition - Is there any specific transition model that City will expect the vendor to follow or the vendors can propose theirs?**

Response: We encourage vendors to propose a robust transition and knowledge transfer plan to ensure continuity of services with no disruption to end-users.

**Question 62: Support - What is the team preposition of the current system?**

Response: The vendor support team currently consists of one on-site technofunctional developer, two off-site developers, and one off-site quality assurance position.

**Question 63: Support - Are the SLAs stated in the RFP document are being followed by the support team now? If not and if this is a new expectation, has the City considered the need for overarching ITSM function including incident/change management, etc.?**

Response: Yes - the same SLAs are in the existing vendor contract.

**Question 64: Support - Is the incumbent vendor providing the Level 1 Help Desk support?**

Response: No, there is an existing City-wide help desk that routes incidents to the current vendor.

**Question 65: Support - Please provide the support tickets historic data (for Get It Done) to arrive at the estimate (including known problem register entries)**

Response: See Question 2.

**Question 66: Support - Is there any multi-lingual support expected?**

Response: No.

**Question 67: Support - Is there any daily/weekly/monthly batch schedule? If yes please provide the integration points and interface lists.**

Response: There are daily batch jobs related to data synchronization between GIS systems, payment gateway systems, and Salesforce.

**Question 68: Support - As per the City of San Diego standards, what is the minimum threshold of efforts define projects vs enhancements?**

Response: Please address this as part of the RFP proposal.

**Question 69: Support - Is support 4 subsidiary Salesforce Org to be accounted for integration and other related sub-ticket items? Please provide the ticket history if support needs to be provided for such tickets.**

Response: Refer to Exhibit B, Section G.

**Question 70: Support - Do you have Operational Level Agreements (OLA) between support functions to enable the vendor to meet the SLAs? If yes, can that be shared?**

Response: Refer to Exhibit B, Section E for information the City can provide.

**Question 71: Onboarding - What are the compliance requirements for any offshore or nearshore support models?**

Response: The City may consider the utilization of off-shore resources with certain restrictions related to the access to confidential or sensitive information. The vendor will need to comply with the Department of IT Information Security requirements to be finalized during negotiations.

**Question 72: Onboarding - Are there any specific clearance needs (beyond their technical and function skills) for onsite team members?**

Response: Vendor staff working onsite or accessing the City's network will be required to sign a copy of, and comply with, the City's Administrative Regulation 90.64 "Protection of Sensitive Information and Data," which may be viewed here:  
<https://www.sandiego.gov/humanresources/resources/ar>. Vendor staff will also be required to pass a City-administered background check.

**Question 73: What is the team size and roles on the current Support team?**

Response: See Question 62.

**Question 74: What is the team size and roles on the current Project Enhancements team(s)?**

Response: We currently do not have a project enhancement team.

**Question 75: What is the current backlog in number of Epics, number of Features and number of User Stories in Support queue?**

Response: There are 4 requests in the backlog with estimated levels of effort.

**Question 76: What is the current backlog in number of Epics, number of Features and number of User Stories in Project Enhancements queue?**

Response: There are 92 requests in the backlog with estimated levels of effort. There are around 20 Epic-type projects that are being discussed.

**Question 77: In the Service Levels Priority Matrix referenced on page 3, what is the average volume of Priority 1, Priority 2, Priority 3, Priority 4 and Priority 5 tickets in a week?**

Response: See Question 2.

**Question 78: Are the tickets referenced in question 77 above, related to integrations? If so, what priority do these kind of issues generally fall in?**

Response: Yes, some of the tickets are related to integrations. Typically, tickets related to integrations involving the Public Works Dispatch team (GIS and SAP) are high priority. Tickets related to ESD Container Payments involving the payment gateway are also treated as high priority.

**Question 79: Are high level SMEs outside of Salesforce currently engaged for support of existing integrated systems like Smarty Streets (address verification)2.Google Maps (public and internal mapping and address validation)3.NOAA (weather reporting)4.Graffiti Tracker (graffiti tracking/enforcement system)5.Twilio (text message service)6.City ESRI/GIS services7.Connected Bits (public and internal mobile apps)8.SAP EAM (Enterprise Asset Management services)9.Accela (Development Services Code Enforcement)10.Amazon S3 (storage for files)11.BasicGov (components within Salesforce)? If so, is this a 1:1 correlation?**

Response:

Support of integrations with external systems is primarily the responsibility of the current vendor. The City will coordinate with

external services, but the support vendor is responsible for understanding how integrations are designed and must be able to troubleshoot as issues arise. Levels of support vary, as detailed below:

1. Smarty Streets – supported by current vendor
2. Google Maps – supported by current vendor with light support through AppGeo
3. NOAA – supported by current vendor
4. Graffiti Tracker – supported by current vendor
5. Twilio – supported by current vendor
6. City ESRI/GIS services – integrated system (javascript viewer) maintained by current vendor. City GIS team and Citywide application support vendor supports ESRI enterprise GIS services.
7. Mobile apps – Get It Done mobile app and worker app maintained and supported by Connected Bits. Salesforce app supported by current vendor.
8. SAP EAM – integration supported by current vendor.
9. Accela – integration supported by current vendor when activated.
10. Amazon S3 – supported by current vendor
11. BasicGov – integration supported by current vendor with support from BasicGov.

**Question 80: Please confirm the firms listed for the "mandatory" pre-proposal conference held Wed. 9/11: ATOS, Brookey & Co., Catalyst Consulting, CGI, Deloitte, Eightcloud, Hex Aware, IBM, Lotus, Shabdika LLC., Total Communicator, West Monroe Partners, Zensar Technologies.**

Response: Confirmed, as listed in Question 80.

**Question 81: Can you provide a copy of the Power Point presentation?**

Response: Yes. See Attachment 3.

**Question 82: In order for the vendors to estimate recommended staffing levels, please provide the following data:**

- i. **Details on all Get it Done maintenance tickets for the past 12 months.**

Response: See Question 2.

- ii. **Details on all Get it Done production incidents for the past 12 months.**

Response: See Question 2.

- iii. **Details on all Get it Done discretionary projects for the past 12 months.**

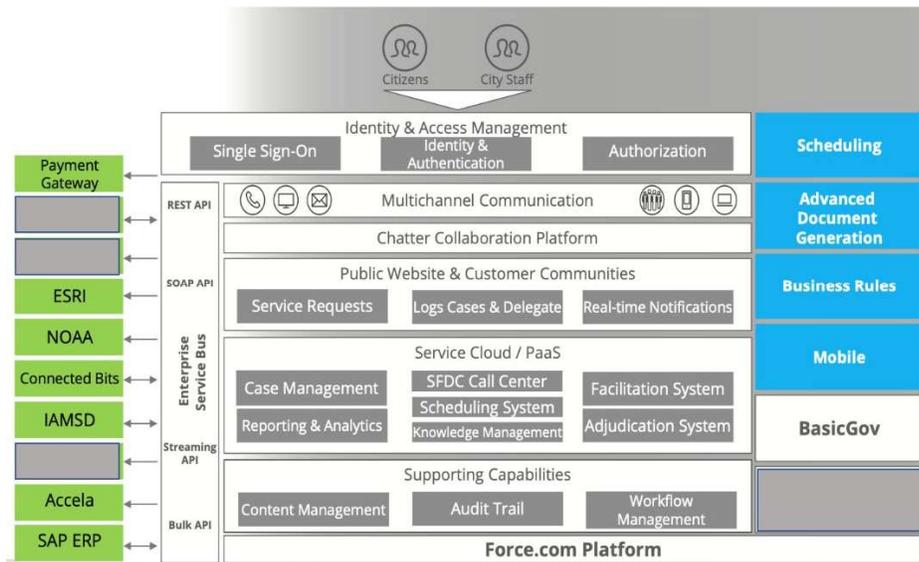
Response: We have had one project related to ESD Container payments.

**iv. List of backlogged/open Get it Done maintenance tickets**

Response: See Questions 75 and 76.

**Question 83: Please provide an architectural diagram for the Get it Done application, to include all interfaces.**

Response: See below high-level diagram. See Exhibit B, Section C for a list of integrations. Not all integrations are shown below.



**Question 84: Please clarify what, if any, responsibility the Vendor has for maintaining the mobile application, currently understood to be provided by ConnectedBits.**

Response: The vendor will not be responsible for maintaining the mobile application currently provided by Connected Bits.

**Question 85: Please clarify what, if any, responsibility the Vendor has for maintaining the Get It Done website.**

Response: Vendor will be responsible for maintaining Salesforce-hosted webpages, but not City-hosted webpages.

**Question 86: Exhibit B, Section J (References) - Please confirm that a separate "references" form is not required but rather, that the proposals should include the information listed in J (1-8) for each of the 3 required references.**

Response: Correct.

**Question 87: Exhibit B, Section J (References) - Please confirm that the reference to "team members" in the last paragraph (Page 8), relates to subcontractors (if any) and not to individual vendor employees.**

Response: Correct.

**Question 88: Exhibit A, Paragraph E (Service Levels): Please confirm the current service level requirements and the performance against the requirements for the past 6 months.**

Response: There have been no service level issues.

**Question 89: Please confirm that the vendor is not responsible for securing or managing Salesforce or ConnectedBits licenses.**

Response: Correct.

**Question 90: With the exception of the required on-site resources, please confirm whether services can be delivered:**

**i. Offshore (outside of the United States)**

Response: Refer to Questions 71 and 72.

**ii. Near shore (Within North America)**

Response: Refer to Questions 71 and 72.

**iii. On shore (Within the United States, but outside of San Diego)**

Response: Refer to Questions 71 and 72.

**Question 91: Exhibit D - Price Schedule: Are the vendors limited to, or required to, submit the total number of resources that equate to the available line items? Or, are vendors allowed to submit or less resource lines as needed to support their proposed solution?**

Response: Proposer can add rows or populate fewer rows, but all sections must be populated. Also see Questions 45, 46, and 49.

**Question 92: Can you release any budgetary information about this initiative?**

Response: See Question 93.

**Question 93: What is your annual budget with the current support provider?**

Response: The annual budget with the current provider is approximately \$500,000. The current contract only includes a baseline support team (no enhancement team).

**Question 94: Can you list all the Salesforce products you currently use? Service Cloud? Any others?**

Response: See Question 6.

**Question 95: Are all your Salesforce products using Salesforce Classic? Have any been transitioned to Lightning Experience yet?**

Response: All Salesforce products are using Salesforce Classic.

**Question 96: What resources (not name, but roles) has Deloitte provided on this project? Which resources (not names, but roles) does Deloitte currently provide for Get It Done?**

Response: See Question 62.

**Question 97: Is the UI/UX vendor, Hopscotch, still involved with this project?**

Response: Not currently.

**Question 98: What is the size (number of) and role make up for the current Deloitte support team? How many resources are full-time/on-site and how many resources were off-site/remote function?**

Response: See Question 62.

**Question 99: How many total support hours did the current support team provide annually (or approximate per month)?**

Response: Approximately five 8-hour days per week per resource.

**Question 100: How many enhancement tickets are in the current backlog?**

Response: See Questions 75 and 76.

**Question 101: How many support tickets are in the backlog currently? How many are Priority 1 or Priority 2 level?**

Response: See Questions 2, 25 and 26.

**Question 102: What percentage of work provided by Deloitte was focused on support versus enhancements versus discretionary projects?**

Response: 20% support, 80% enhancements, approximately.

**Question 103: We acknowledge that one full-time support team member and one full-time enhancement/expansion team member must be on-site. Do you have additional on-site requirements during the transition from current to new vendor? How about after the transition?**

Response: This can be specified in your transition plan.

**Question 104: Can you submit new service requests on the web portal or just view previously submitted requests?**

Response: Get It Done service requests can be submitted via the web at <https://www.sandiego.gov/get-it-done> or via the mobile app.

**Question 105: Can you disclose any pain points in the existing web portal?**

Response: We are constantly evaluating feedback and identifying areas that can improved.

**Question 106: How many different service request types can be submitted via the mobile app?**

Response: Please download the Get It Done San Diego in the Apple App Store or Google Play Store to see the available service requests or visit <https://www.sandiego.gov/get-it-done>.

**Question 107: What technology do field crews attending to service requests use? Is there a mobile/in-the-field option for them?**

Response: Certain requests types have mobile field crew support and custom pages (example: graffiti team).

**Question 108: We understand Deloitte's contract expires on July 31, 2020. In relation to this date, when do you anticipate awarding a new support partner?**

Response: We plan to have the new contract in effect a minimum of three months before the end of the current contract.

**Question 109: Assuming that this contract would begin in (at the earliest) August 2020, please confirm you expect respondents to submit resumes and an organizational chart with named resources in their submission.**

Response: Resumes and organizational charts need to be submitted with your RFP response.

**Question 110: This work would tentatively start in 8 months. How should respondents address staffing changes if resources whose resumes were proposed no longer work for the vendor come July/August 2020?**

Response: If changes need to be made during negotiations, the City will evaluate the request to modify resources based on equivalent experience and qualifications.

**Question 111: What is the procedure for an implementation partner completing work on any of the other Salesforce orgs in the City of San Diego? Will the vendor be required to submit a SOW with pricing specific to that scope?**

Response: Yes, the vendor would submit an estimate for the work requested based on the hourly resource pricing agreed upon in this contract.

ATTACHMENT 1

Summary of Enhancements and Incidents

Defect Type →		Enhancement	Incident	Code Issue	Data Issue	Configuration Issue	User Setup Issue	Basic Gov	Total
Change Request: Created Date ↑	Business Impact ↑	Record Count	Record Count	Record Count	Record Count				
March 2019	4-Very High	2	0	0	0	0	0	0	2
	3-High	5	0	0	1	0	0	0	6
	2-Medium	12	0	0	0	0	0	0	12
	1-Low	21	0	0	0	1	0	0	22
<b>Subtotal</b>		40	0	0	1	0	1	0	42
April 2019	4-Very High	5	8	0	0	0	0	0	13
	3-High	10	7	0	0	0	0	0	17
	2-Medium	22	19	0	0	0	2	0	43
	1-Low	11	137	0	0	0	1	0	149
<b>Subtotal</b>		48	171	0	0	0	3	0	222
May 2019	5-Critical	1	0	0	0	0	0	0	1
	4-Very High	3	8	0	0	0	0	0	11
	3-High	22	0	0	0	0	1	1	24
	2-Medium	35	1	0	0	0	0	0	36

## Summary of Enhancements and Incidents

	1-Low	12	0	0	0	0	0	0	0	0	0	12
<b>Subtotal</b>		73	9	0	0	0	0	0	1	1	0	84
June 2019	5-Critical	3	4	0	0	0	0	0	0	0	0	7
	4-Very High	1	3	0	0	1	0	0	0	0	0	5
	3-High	9	0	0	0	0	0	0	0	0	0	9
	2-Medium	27	0	0	1	0	0	1	0	0	0	29
	1-Low	3	0	0	0	0	0	0	0	0	0	3
<b>Subtotal</b>		43	7	0	1	1	0	1	1	0	0	53
July 2019	5-Critical	1	0	0	0	0	0	0	0	0	0	1
	4-Very High	5	7	0	0	0	0	0	0	0	0	12
	3-High	15	0	0	0	0	0	0	0	0	0	15
	2-Medium	33	0	0	1	0	0	1	0	0	0	35
	1-Low	7	0	0	0	0	0	0	0	0	0	7
<b>Subtotal</b>		61	7	0	1	1	0	1	0	0	0	70
August 2019	5-Critical	2	0	0	0	0	0	0	0	0	0	2
	4-Very High	4	3	0	0	0	0	0	0	0	0	7
	3-High	15	0	1	0	0	0	0	0	0	0	16
	2-Medium	32	0	0	0	0	1	0	2	0	0	35
	1-Low	2	0	0	0	0	0	0	0	0	0	2

## Summary of Enhancements and Incidents

<b>Subtotal</b>		55	3	1	0	1	2	0	62
September 2019	5-Critical	1	0	0	0	0	0	0	1
	4-Very High	1	1	0	0	0	0	0	2
	3-High	6	0	0	0	0	0	0	6
	2-Medium	11	0	0	1	0	0	0	12
	1-Low	0	0	0	0	0	1	0	1
<b>Subtotal</b>		19	1	0	1	0	1	0	22
<b>Total</b>		339	198	1	4	2	10	1	555

## Summary of Enhancements and Incidents

Department

Defect Type →		Enhancement	Incident	Code Issue	Data Issue	Configuration Issue	User Setup Issue	Basic Gov	Total
Change Request: Created Date ↑	Department ↑	Record Count	Record Count	Record Count	Record Count				
March 2019	Environmental Services	17	0	0	1	0	1	0	19
	Public Utilities	3	0	0	0	0	0	0	3
	Station 38	1	0	0	0	0	0	0	1
	Transportation & Storm Water	7	0	0	0	0	0	0	7
	Performance & Analytics	12	0	0	0	0	0	0	12
<b>Subtotal</b>		40	0	0	1	0	1	0	42
April 2019		0	56	0	0	0	0	0	56
	Environmental Services	8	55	0	0	0	2	0	65
	Performance and Analytics	11	0	0	0	0	0	0	11
	Police Communications	0	1	0	0	0	0	0	1

## Summary of Enhancements and Incidents

Public Utilities	1	6	0	0	0	0	0	0	0	0	0	7
Station 38	0	3	0	0	0	0	0	0	0	0	0	3
Storm Water Code Enforcement	1	0	0	0	0	0	0	0	0	0	0	1
TSW	5	0	0	0	0	0	0	0	0	0	0	5
Transportation & Storm Water	5	23	0	0	0	0	0	0	0	0	0	28
Performance & Analytics	17	27	0	0	0	0	0	0	1	0	0	45
<b>Subtotal</b>	<b>48</b>	<b>171</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>222</b>
72 Hour AVA	3	0	0	0	0	0	0	0	0	0	0	3
Code Compliance	1	0	0	0	0	0	0	0	0	0	0	1
Construction and Demolition	1	0	0	0	0	0	0	0	0	0	0	1
Environmental Services	16	2	0	0	0	0	0	0	1	1	0	20
Graffiti	2	0	0	0	0	0	0	0	0	0	0	2
PD	1	0	0	0	0	0	0	0	0	0	0	1
Performance and Analytics	10	0	0	0	0	0	0	0	0	0	0	10
Public Utilities	1	0	0	0	0	0	0	0	0	0	0	1

## Summary of Enhancements and Incidents

Station 38	11	2	0	0	0	0	0	0	0	0	0	13
Storm Water Code Enforcement	1	0	0	0	0	0	0	0	0	0	0	1
TSW	16	1	0	0	0	0	0	0	0	0	0	17
Transportation & Storm Water	4	0	0	0	0	0	0	0	0	0	0	4
Performance & Analytics	6	4	0	0	0	0	0	0	0	0	0	10
<b>Subtotal</b>	<b>73</b>	<b>9</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>84</b>
June 2019	1	0	0	0	0	0	0	0	0	0	0	1
Development Services	1	0	0	0	0	0	0	0	0	0	0	1
Environmental Services	9	3	0	0	1	0	0	0	0	0	0	13
Performance and Analytics	9	0	0	0	0	0	1	0	0	0	0	10
Public Utilities	4	1	0	0	0	0	0	0	0	0	0	5
Station 38	4	3	0	0	0	0	0	0	1	0	0	8
Storm Water Code Enforcement	2	0	0	0	0	0	0	0	0	0	0	2
TSW	10	0	0	0	0	0	0	0	0	0	0	10

## Summary of Enhancements and Incidents

Transportation & Storm Water	1	0	0	0	0	0	0	0	0	0	0	1
Performance & Analytics	2	0	0	0	0	0	0	0	0	0	0	2
<b>Subtotal</b>	43	7	0	1	1	0	1	0	0	0	0	53
Environmental Services	18	2	0	1	1	0	1	0	0	0	0	22
Graffiti	1	0	0	0	0	0	0	0	0	0	0	1
Office of City Clerk	1	0	0	0	0	0	0	0	0	0	0	1
Performance and Analytics	9	0	0	0	0	0	0	0	0	0	0	9
Public Utilities	5	0	0	0	0	0	0	0	0	0	0	5
Station 38	5	2	0	0	0	0	0	0	0	0	0	7
Storm Water Code Enforcement	0	1	0	0	0	0	0	0	0	0	0	1
TSW	7	1	0	0	0	0	0	0	0	0	0	8
Transportation & Storm Water	13	0	0	0	0	0	0	0	0	0	0	13
Performance & Analytics	2	1	0	0	0	0	0	0	0	0	0	3
<b>Subtotal</b>	61	7	0	1	1	0	1	0	0	0	1	70





## Summary of Enhancements and Incidents

April 2019	Day	44	151	0	0	0	3	0	198
	Week	3	19	0	0	0	0	0	22
	Longer	1	1	0	0	0	0	0	2
<b>Subtotal</b>		48	171	0	0	0	3	0	222
May 2019	Day	69	8	0	0	0	1	1	79
	Week	3	1	0	0	0	0	0	4
	Longer	1	0	0	0	0	0	0	1
<b>Subtotal</b>		73	9	0	0	0	1	1	84
June 2019	Day	38	7	0	1	1	1	0	48
	Week	5	0	0	0	0	0	0	5
<b>Subtotal</b>		43	7	0	1	1	1	0	53
July 2019	Day	54	7	0	1	0	1	0	63
	Week	7	0	0	0	0	0	0	7
<b>Subtotal</b>		61	7	0	1	0	1	0	70
August 2019	Day	51	3	1	0	1	2	0	58
	Week	4	0	0	0	0	0	0	4
<b>Subtotal</b>		55	3	1	0	1	2	0	62
September 2019	Day	19	1	0	1	0	1	0	22
	<b>Subtotal</b>	19	1	0	1	0	1	0	22

Summary of Enhancements and Incidents

<b>Total</b>	339	198	1	4	2	10	1	555
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## ATTACHMENT 2

### Standard and Custom Objects

Automation Rules	GIS Sync Interface	Permits.
Batches	Graphics Pack Overview	PKB 2 Settings
Bill of Ladings	GRE Fixtures	PKB Featured
BMP	GRE Inspections	Plan Check Fixtures
BMP Inspections	GRE Maintenances	Plan Checks
Bonds	GREs	Price Books
Business Holidays	Groups	Printer Packages
Campaigns	HAZMAT Slots	Problem Items
Carts	Help	Proceedings
Cases	Home	Products
Case Tasks	Ideas	Profile
Case Viewer	Impaired Pollutants Mappings	Profile Feed
Chatter	Inspections	Profile Overview
CheckList	Inventories	Projects
Checklist Admin	Investigation Contributors	Projects.
Complaints	Investigations	Purchase Orders
Complaints.	Invoices	Q&A
Conditions	Itinerary	Queries
Contact On/Off Web	Kitchen Fixtures	Question Choices
Contact Point Type Consent	Kitchen Plan Checks	Questions
Contacts	Kitchens	Questions
Container Assignments	Knowledge	Question Types
Container Checks	KnowledgeArticle Search	Receipts
Container Delivery Schedules	Leads	Reports
Containers	Letter Queries	Requirement Extension Historys
Container Types	Letters	Requirement Fixtures
Content Requests	Letter Templates	Requirements
Contests	Licenses	Reviews
Contracts	Licenses.	Scheduling
Customer Content Feedback	Line Items	Sequence Numbers
Dashboards	List Emails	Service Contracts
Data Use Legal Basis	Load Batches	SIC Category Mappings
Data Use Purpose	Macros	Site Groups
Dependency Question Sets	Manufacturer	Sites
Deposits	Mapping Service	Slot informations
Documents	Master Distribution Lists	Solutions
DRE Launch	Master Fee List	Streaming Channels
DRE Rules	Master Inspection Lists	Survey Question Responses
DTE Test Cases	Master Submission Lists	Survey Questions
DTE Test Macros	Master Valuation Lists	Surveys
Duplicate Record Sets	Milestones	Surveys Taken
Entitlements	Mobile By Categories	User Provisioning Requests
Equipments	Monthly Storm Water Report	Vehicle Assignments
ESD Carts	Municipal Codes	Vehicles
ESD Notes	Occupancy Types	View Reports
Establishment Map	On Site Pollutant Mappings	Violations
Establishments	Opportunities	Warehouses
Establishment Summary Print	Orders	Watershed Queue Name Mappings
Event Logs	Ordinances	Webcall Entities
Field Group Elements	Owner Changes	Webservice Call Logs
Files	Page Questions	Window information
Forecasts	Pages	Work Order Maps
Funds	Parcels	Work Orders
Getting Started	People	ZipCode Inspector Mappings
GIS Data Synchronizer	Permits	

ATTACHMENT 3

Performance & Analytics Department  
**Get It Done/Salesforce**  
Application Development Maintenance Support  
RFP #10089580-20-J; Pre-Proposal Meeting

September 10, 2019



**Alex Hempton**  
Program Manager  
Technology & Innovation

## Street Division Service Request

Welcome to the Street Division Service Request page.

To Place an **Emergency** service request including traffic signal malfunction, please call Street Division Customer Service at 619-527-7500.

If your request is not an Emergency or about a Traffic Signal please create a service request for repairs or services on street related issues by using one of the online methods below:

- [Map Method](#): Use our online mapping system to pinpoint the problem and location.
- [Text Method](#): Submit a written description of the problem and location.

To view the status of a previous request submitted through an online method, please select:

- [Check Status of Service Request](#)

Please note that Storm Drains section is now part of Transportation & Storm Water Department. To report pollution entering the City storm drain system, visit the Storm Water Service Request system which can also be found in the "Access online services" section of The City of San Diego Home Page.

Translate this site:  
 Select Language  
 Powered by Google Translate  
[Translate Information](#)



## Street Division Service Request

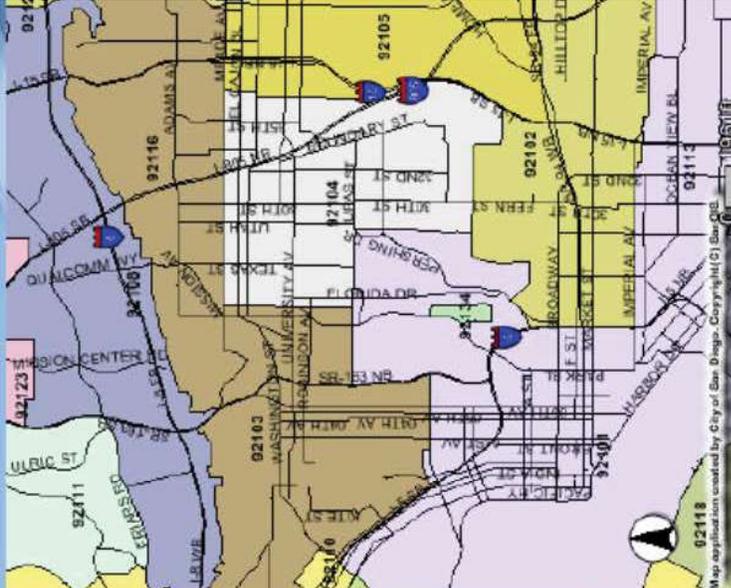
**Step 1. Select one of the following options:**  
 Address or Intersection  Community  Zip code  
 92106

**Step 2. What is the problem related to ?**  
 Asphalt Street Damaged

**Step 3. Retrieve Map.**  
 Fill in Step 1 and Step 2 and then Click on "Get Map" to view your problem location

**Step 4. Select Item.**  
 This symbol represents Street Section. Click the Identify button, then click on the map to choose your problem location. The selected item will be highlighted in yellow.

- Tips**
- If you do not see the symbol (shown in Step 4) on the map, use "Zoom in" button to zoom further until the symbol becomes visible.
  - You may click the "Zoom in", "Zoom Out" or "Pan" button to better view your problem location.
  - If you have difficulty identifying the problem location, click "Select Street" button and choose the closest street section on the map.








# Why Get It Done?

## Improve Customer Service

- City Auditor Report
- Customer Feedback
- Mayoral Priority

2015

## Roadmap to Success

- 311 Customer Experience & Service Delivery Roadmap
- Launch of "Get It Done" Pilot Project

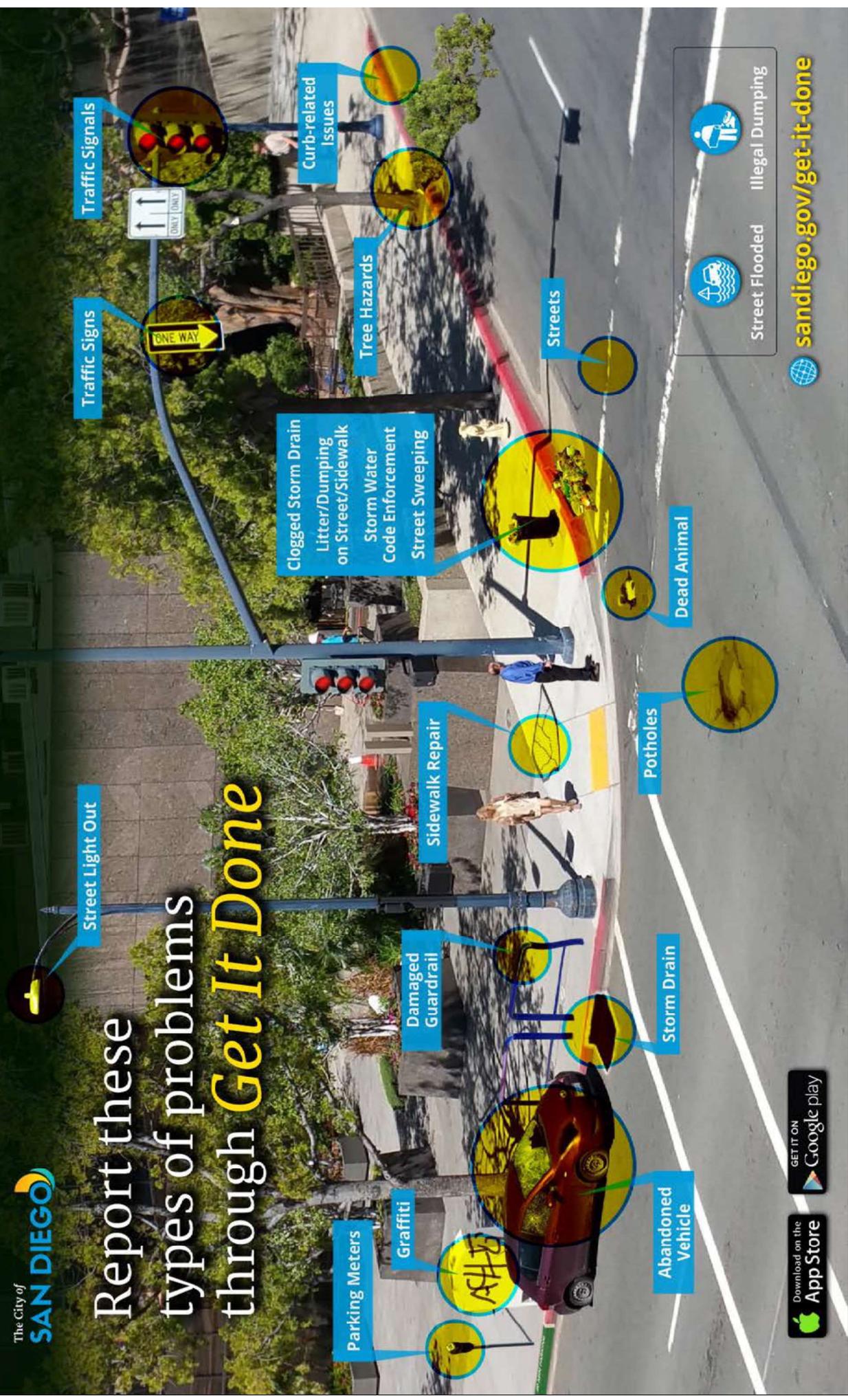
2016

## Continue to Improve & Expand

- Get It Done Expansion Launch
- Plan Expansions & Enhancements

2018-

# Report these types of problems through *Get It Done*



Street Light Out

Traffic Signals

Traffic Signs

Curb-related Issues

Tree Hazards

Streets

Clogged Storm Drain  
Litter/Dumping on Street/Sidewalk  
Storm Water Code Enforcement  
Street Sweeping

Dead Animal

Sidewalk Repair

Potholes

Damaged Guardrail

Storm Drain

Abandoned Vehicle

Parking Meters

Graffiti



Illegal Dumping



Street Flooded



[sandiego.gov/get-it-done](http://sandiego.gov/get-it-done)

New Case

Accept

Change Owner

Print Cases



ACTION	CASE NUMBER ↑	SUBJECT	CASE CREATION ...	STREET ADDRESS	PRIORITY INDIC...	CONTACT NAME	STATUS	REPORT ORIC
	00305752	Sidewalk at 1143...	3/12/2018 6:21 ...	1143-1199 State ...			New	
	02409810	Other	10/1/2018 4:41 ...				New	
	02409818	Pothole	10/3/2018 2:56 ...	1921 32nd St, Sa...			New	
	02409821	Traffic Signal	10/3/2018 3:21 ...	9871 Aero Dr, Sa...			New	
	02409823	Traffic Signal	10/3/2018 3:43 ...	10775 Westview ...			New	
	02409844	Other at 9707 Ae...	10/4/2018 5:29 ...	9707 Aero Dr, Sa...			Duplicate ★	
	02409872	Street Light	10/5/2018 2:57 ...	1895 Park Blvd, S...			New	
	02409873	Street Light	10/5/2018 3:31 ...	2215 Pan Americ...			New	
	02409874	Street Light	10/5/2018 3:32 ...	2215 Pan Americ...			New	
	02409875	Tree Hazard	10/5/2018 3:33 ...	2505 Fifth Ave, S...			New	

**Close Tab**

**Create Service Order**

**Refer Case**

Graffiti |  IAMSD  
**Reporter Details:** ANONYMOUS

**Case Details:** New | Case Number: 02411109  
 Hide from Web:  | Priority: Mec | Status: New  
 Search Address: 1222 1ST AVE, 92101  
 Reporter Provided Street Address: 1222 1ST AVE, 92101  
 Subject Category: PAVEMENT | Subject Code: S545  
 Subject Type: POTHOLE | Notification Type: TC  
 Public Description: bad pothole  
 Photos:

**Functional Location:** SS-000028-PV | **IAM Functional Location:** SS-000028-PV1  
**Equipment ID:** [ ] | **Material ID:** [ ] | **Latitude:** 32.7192324 | **Longitude:** -117.163886 | **Google Maps:** 32.71883524574063-117.16385952797107

**Update New Location**

Layers:  GeoSAP Dynamic

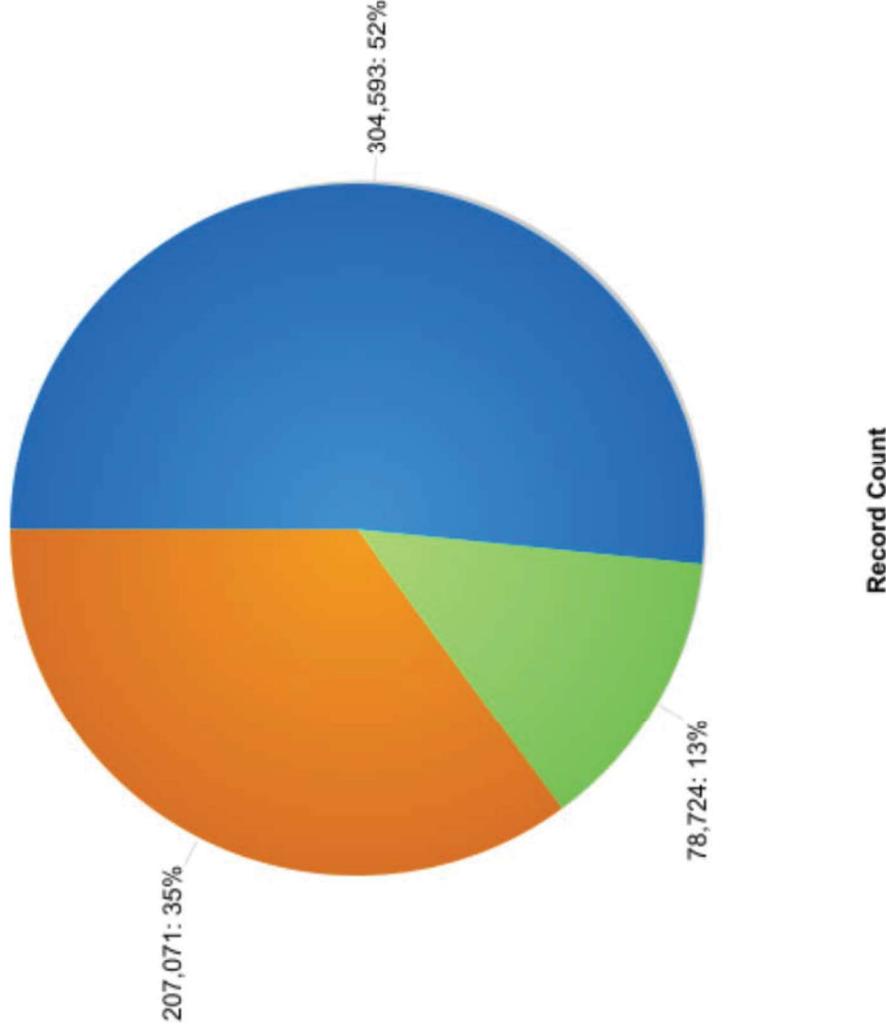
Identify: Choose a single layer for identify: [ ]

Help

Pavement  
 Road Segment 929829  
 ID  
 SAP ID SS-000028-PV1  
 Community Plan 4  
 Area  
 Council District 3  
 Work Area 3  
 Thomas Bros 1289-A2  
 Page  
 Low Address 1300  
 High Address 1399  
 Zoom to

# Get It Done Reports by Origin

- 87% via web & mobile
- Currently ~1,000 reports per day
- Nearly 600,000 reports since May 2016





# Get It Done Expansion

Simple & Easy ways for customers to engage with the City and modern tools for employees.

- **9** departments
- **6** legacy systems replaced
- **250** end-users



# High-Level Overview

Department	Functions
<b>City Clerk</b>	Passport appointments
<b>Communications</b>	FAQ/Knowledge Base Coordination
<b>Development Services (DSD)</b>	Intake of Code Enforcement reports* and integration with Accela
<b>Environmental Services (ESD)</b>	Collection Services, ESD Code Enforcement, Field Operations, Lead Abatement, HAZMAT Appointment Scheduling, Container Purchase & Inventory, Lead Inspections, Construction & Demolition Deposit Tracking, Collection Schedule Lookup
<b>Parks &amp; Recreation</b>	Open Space Code Enforcement
<b>Performance &amp; Analytics</b>	Overall system planning, administration, and governance; Customer Surveys; FAQ Admin; Mobile App & Integration Coordination
<b>Police</b>	Vehicle-related complaints: 72-Hour Parking Violations, Oversize Vehicles, Parking Zone Violations; Neighborhood Policing*
<b>Public Utilities (PUD)</b>	FEWD restaurant inspection program
<b>Public Works</b>	Storm Water Coordination
<b>Transportation and Storm Water (TSW)</b>	Storm Water Code Enforcement & Coordination, Storm Water BMP Inspections, Streets and Graffiti Code Enforcement, Public Works Dispatch Intake, Traffic Engineering Intake, Storm Water Intake, Graffiti Work Orders, Urban Forestry*

\* Not currently released to public.



# Performance & Analytics Department





**PASSPORT SERVICES**

- Schedule an Appointment for a Passport



**TREES & VEGETATION**

- **Tree Hazard:** Blocking Street/Sidewalk • Branch/Tree down • Dead/Unstable • Visibility of Traffic Signs/Signals



**PARKING ISSUE**

- 72 Hour Vehicle Violation
- Parking Zone Violation
- Oversized Vehicle Complaints



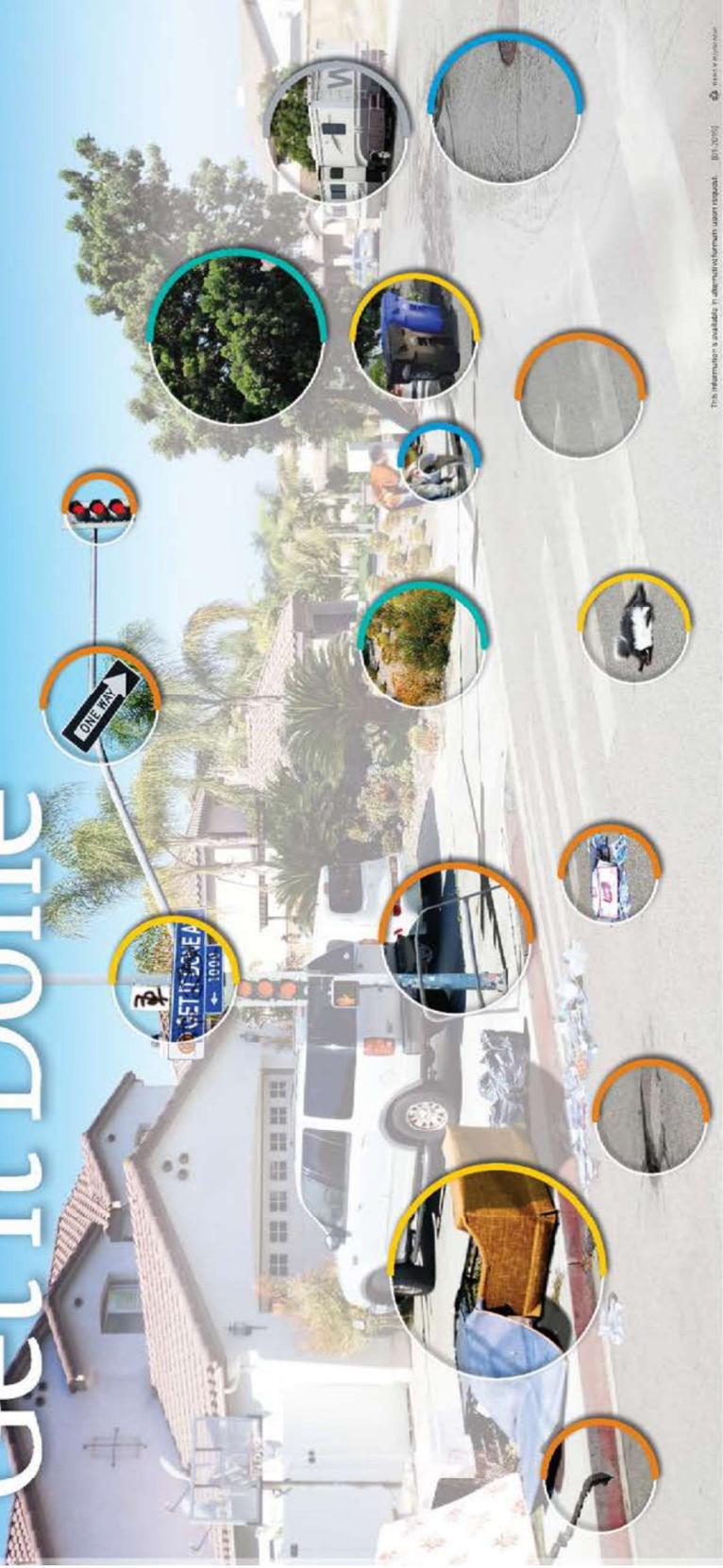
**STORM WATER & DRAINS**

- **Illegal Discharge**
- **Over Irrigation**
- **Storm Drain:** Channel Cleaning • Clogged Storm Drain • Foul Odor • Grate Frame Broken or Missing • Object in Drain
- **Street Flooded**

Simple and easy to connect with the City:

- Report non-emergency problems
- Schedule appointments
- Obtain information

# Get It Done



This information is available in alternate format upon request. (01/2015)



**STREETS, SIDEWALKS & LIGHTS**

- **Curb:** Damage • Faded Paint • Illegal Painting
- **Damaged Guardrail**
- **Faded Striping**
- **Pothole**
- **Sidewalk Repair**
- **Street Light:** Light On During the Day • Light Out
- **Street Sweeping**
- **Traffic Sign:** Faded Sign • Knocked Over • Missing Sign



- **Traffic Signal:** All Lights Out • Flashing Red • Light Out • Signal Facing Wrong Direction • Timing
- **Other**



**TRASH COLLECTION, RECYCLING & GRAFFITI**

- **ADA Assisted Collection**
- **Container Left Out**
- **Dead Animal**
- **Dumpster Encroaching on Public Right of Way**
- **Find My Trash Collection Schedule**
- **Graffiti**
- **Hazmat Appointment**
- **Illegal Dumping:** Abandoned Camp • Active Camp • Bulky Items
- **Missed Collection**
- **Scavenging of Blue Recycling or Black Trash Containers**



Download your mobile app today! "Get It Done San Diego"



[sandiego.gov/get-it-done](http://sandiego.gov/get-it-done)



[View Reports](#)

[View Knowledge Base](#)

### Top Online Services



Potholes



Graffiti



Illegal Dumping

### Browse Online Services

-  Parking & Vehicle Related Issues +
-  Trash Collection, Recycling & Graffiti +
-  Streets, Sidewalks & Lights +
-  Trees & Vegetation +
-  Water, Sewer & Drains +
-  +



# Knowledge Article Search

Search:

Filter By:

## Articles:

Someone left an item (sofa, mattress, etc.) on the sidewalk / in the alley / in the canyon. How do I report this?

How do I report an abandoned shopping cart?

How do I find my Assessor's Parcel Number (APN)?

### How can I report a bike share issue?

The City is tracking these complaints and encourages you to contact the company so they can move their property. The list of company contact information is listed below.

[Bike and Scooter Sharing Complaints - Contact Information](#)

Bird  
(Black scooters)  
1-866-205-2442  
hello@bird.co  
<https://www.bird.co/>

Discover Bike  
(Silver bikes...Owned and operated by DecoBike)  
619-297-0433  
info@discoverbikesandiego.com  
<http://www.discoverbikesandiego.com/>

# View Reports

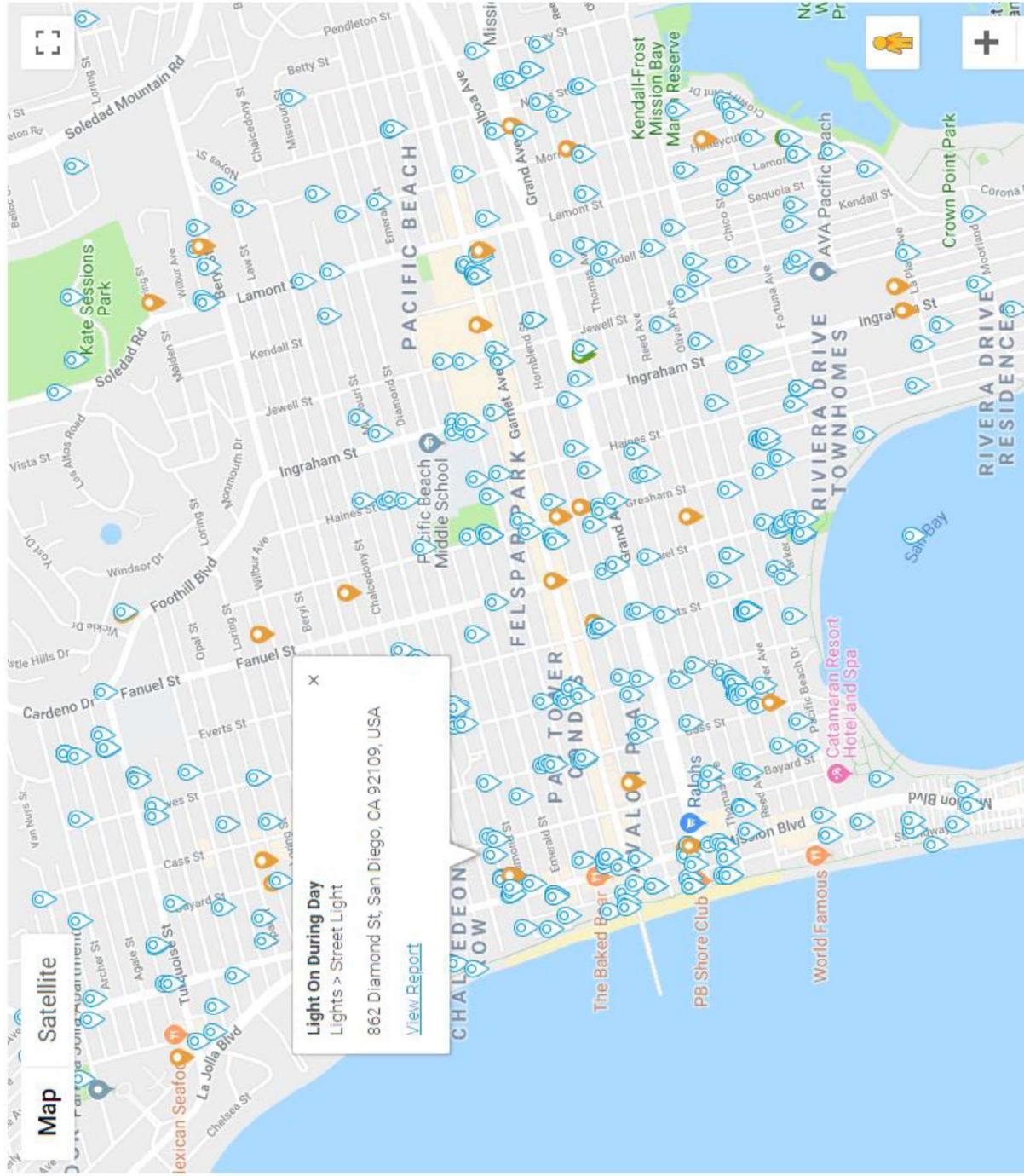
Map View

[Switch to List View](#)

Search Address

Map

Satellite



New

In Process

Closed

Search with Keyword



## Filters

New

In Process

Closed

Custom Date Range

Start Date

07/01/2018

End Date

07/28/2018

## Categories

- 72 Hour Violation (3)
- 72-hour Vehicle Violation (115)
- Curb (10)
- Graffiti (63)
- Illegal Dumping (5)
- Other (165)
- Pothole (9)
- Storm Drain (3)
- Street Flooded (3)
- Street Light (2)
- Traffic Sign (1)
- Traffic Signal (20)

## Helpful Links

Case **02410351**

Customize Page | Edit Layout | Printable View | Help for this Page



« Back to List: Cases

Content Document | ESD Notes | Attachments | Inspections | Violations | Work Orders | Activity History | Open Activities | Related Cases | Articles | Surveys Taken | Case History

**Case Detail**

Case Number 02410351 [View Hierarchy](#) Case Owner [ESD Customer Service Queue](#) [Change](#) Mobile

Case Record Type [ESD Complaint/Report](#) [Change](#)

Case Type Illegal Dumping Date Referred to Risk Management

Status Open Hide from Web

Priority Medium IAM Functional Location

Hours Old 1,347

**Complaint/ Problem Details**

Complaint Date/Time 1/7/2019 2:30 PM

Public Description Test

Customer Provided Address 302-372 Beech St, San Diego, CA

Location Description Hgf

Street Address 302-372 Beech St

Specify the Issue Bulky Items

Contact Name

Council District

Contact Phone

**Duplicate Check and Bypass Check Boxes**

Duplicate Verified

Override Duplicate

Parent Case

Parent Status

**Responsible Party Details**

Responsible Party Name

Container Type

License Plate Number

Container Serial Number

**Address**

Map Satellite

Search Address

Primary Number/Street Number  Street Name



**Before**

## Passport Services

Appointments

Click from Broadway and 2nd, and at the "Civic Center" stop of

do not accept cash, credit or debit cards.

3. Select Time

4. Finalize Appointment

to City Clerk's US passport application online reservation system!

read all the information provided on our Passport Services webpage.

menu and check-boxes on the left to select the service(s) you need.

are not available.

appointment? Call us at (619) 533-4000 [TTY/TDD (619) 236-7012].

We offer passport photo service on-site for a \$10 fee. No additional appointment time is

3: Generally, both parents/guardians must appear in person with the child and provide passport issuance. You must establish proof of citizenship AND proof of relationship. Proof is not acceptable as proof of relationship to the applying parent(s)/guardian(s). For more information, visit our website at [www.travel.state.gov](http://www.travel.state.gov) for further information on proof of relationship

children ages 16-17 with their own identification can apply for a passport by themselves. Children ages 16-17 must appear in person with the child to identify him/her and to show proof of relationship to the applying parent(s)/guardian(s). For more information, visit our website at [www.travel.state.gov](http://www.travel.state.gov) for further information regarding children ages 16-17.

id.ie.available.to.submit\_and.it.is.not.damaged.

**After**

Visit [sandiego.gov](http://sandiego.gov)



NEW REPORT VIEW REPORTS KNOWLEDGE BASE

New Appointment Request

Schedule Appointment

Contact Information

## Passport Appointment

Complete steps 1 through 3 to schedule a passport appointment.

1 Select the number of applicants:

1 Applicant (30 min)

All applicants must be present.

2 Select additional appointment details:

Does this appointment include minors (ages 15 and under)?

No

If yes, please read [guidelines](#) regarding minors.

3 Photo is required:

Do you want us to take your picture for \$12 dollars per photo?

Yes



Before

Name	Phone	Area	Area Book	Intersection	SR Unit Code	Complaint Date	Upd to	Sort Ind	Requestor Address	Mail
None		None	F2497 A1		0022718	08/22/18	ESC	Sup		P102
None		None	F2388 F5		0022718	08/22/18	ESC	Sup		P103
None		None	F2328 D7		0022718	08/22/18	ESC	Sup		P104
None		None	F2365 C6		0022718	08/22/18	ESC	Sup		P105
None		None	F2365 C6		0022718	08/22/18	ESC	Sup		P106
None		None	F2365 C6		0022718	08/22/18	ESC	Sup		P107
None		None	F2365 C6		0022718	08/22/18	ESC	Sup		P108
None		None	F247 J6		0022718	08/22/18	ESC	Sup		P109
None		None	F2387 A3		0022718	08/22/18	ESC	Sup		P110
None		None	F2387 F5		0022718	08/22/18	ESC	Sup		P111
None		None	F2367 J1		0022718	08/22/18	ESC	Sup		P112

After

The City of **SAN DIEGO**

Search...  Search

Home Cases Reports Work Orders Sites Inspections Contacts Violations Vehicle Assignments

**ESD Customer Service Queue** Edit | Delete | Create New

Custom Links

- Schedule HAZMAT Appointment
- ESD Collections Container Request
- ESD Collection Schedule

Recent Items

- 02401401
- 02401257
- 02778592
- 02398023
- Jon Terwilliger
- WS-LOG-20180925...
- WS-LOG-20180925...
- 00397204
- Jon Terwilliger

Recycle Bin

ESD Customer Service Queue

Action	Case Number	Case Record T...	Case Type
Edit   Del   +	02412969	ESD Complain...	Illegal Dumping
Edit   Del   +	02412970	ESD Complain...	Illegal Dumping
Edit   Del   +	02412973	ESD Complain...	Illegal Dumping
Edit   Del   +	02412974	ESD Complain...	Illegal Dumping
Edit   Del   +	02412977	ESD Complain...	Illegal Dumping
Edit   Del   +	02412988	ESD Complain...	Illegal Dumping
Edit   Del   +	02413072	ESD Complain...	Illegal Dumping
Edit   Del   +	02413079	Street Division	Street Division
Edit   Del   +	02413082	Street Division	Street Division
Edit   Del   +	02413087	ESD Complain...	Illegal Dumping
Edit   Del   +	02413100	Street Division	Street Division
Edit   Del   +	02413101	ESD Collectio...	Replace Damaged ...
Edit   Del   +	02413102	ESD Complain...	Illegal Dumping
Edit   Del   +	02413105	ESD Complain...	Illegal Dumping
Edit   Del   +	02413128	ESD Collectio...	Repair Damaged C...
Edit   Del   +	02413133	ESD Complain...	Illegal Dumping
Edit   Del   +	02413136	ESD Collectio...	Replace Damaged ...
Edit   Del   +	02413151	ESD Complain...	Dead Animal

# Support Overview

- **Baseline Support Team**
  - 24/7/365 day-to-day support of system; extra capacity used to work on enhancements.
- **Enhancements/Expansions Team**
  - Dedicated team to work on smaller projects.
- **Discretionary Projects**
  - Allow contract capacity for larger projects via separate POs.

# Thank you!



“I was really surprised and grateful how fast the get it done program responded to our issue of the couch dumped on our street. Thank you!”

“I reported the problem around 1pm Thursday and when I got home from work Friday it was complete!! Thank you, thank you, thank you”

“City resolved the issue within 24 hours.”



## **City of San Diego GID Salesforce PADMS Contract**

Response to RFP -10089580-20-J

Submitted on October 21, 2019



## Tab A

# Submission of Information and Forms

### Contents:

- 2.1 Contract/Addendum Signature Page
- 2.2 Requested Exceptions
- 2.3 Contractor Standards Pledge of Compliance Form
- 2.4 Equal Opportunity Contracting Forms

## 2.2 Requested Exceptions

Deloitte Consulting LLP ("Deloitte Consulting") is pleased to submit this proposal (the "Response") for the Get It Done/Salesforce Platform Application Development, Maintenance, and Support opportunity as requested by the City of San Diego ("City" or "San Diego"), in response to RFP#: 10089580-20-J (the "RFP"). Our working relationship with the City has proven that, almost without exception, the City and Deloitte Consulting have been successful in expeditiously working together through important engagement requirements and provisions (i.e., indemnification, limitation of liability, intellectual property, etc.). Thus, in the event that we are selected for award, please trust that Deloitte Consulting is open and ready to promptly negotiate mutually agreeable terms in a collaborative and expeditious manner – similar to how the parties have successfully negotiated and executed previous complex engagements in the past (i.e., The Get It Done Expansion Project – Cont. No. 4600003144).

As set out in our Response, Deloitte Consulting is qualified and prepared to provide the requested services to the City. As such, we respectfully submit our Response and propose that to the extent applicable, the parties agree to consider leveraging previous negotiations, including substantively similar terms and conditions in accordance with previous or existing contracts between the City and Deloitte Consulting (i.e., The Get It Done Expansion Project – Cont. No. 4600003144). To this end, Deloitte Consulting formally takes exception to the referenced terms and conditions in the RFP (including any related addenda, attachments, terms, and policies incorporated therein, etc.) and reserves the right to discuss and negotiate any clarifications, exceptions and additional provisions to accommodate engagement-specific elements. We look forward to working with the City on this opportunity as our Response is submitted subject to the condition that Deloitte Consulting and the City reach mutual agreement as we have successfully done in the past.



## Tab B

# Executive Summary and Responses to Specifications

### Contents:

2.12 Title Page

2.13 Table of Contents

2.14 Executive Summary

2.15 Deloitte's Response to the RFP



**City of San Diego GID Salesforce  
PADMS Contract**  
Response to RFP -10089580-20-J

Submitted on October 21, 2019



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# We Get It Done for San Diego

We know that making the City's services easier to access and more transparent through Get It Done, empowered San Diego's residents to become more engaged with City services and passionate about improving the communities in which they live.

Deloitte is proud of the role we performed in helping the City deploy and maintain the award winning Get It Done solution, and we are committed to continuing to deliver highest-quality technical services and support to the City in further expanding the Get It Done program.



## Executive Summary

Deloitte has the right experience, approach, and team to continue supporting the City of San Diego's Salesforce needs.

Deloitte has been on the ground, working closely with the City's Performance and Analytics Department in designing, developing, deploying, maintaining, and enhancing the Salesforce-based Get It Done solution since November 2017.

Our first exposure to the program was through our work delivering the Get It Done Expansion project, where we worked closely with City stakeholders on expanding the Get It Done Pilot to 9 departments and successfully replacing several aging legacy systems (including Environmental Service's EPACS system, which survived 3 prior replacement attempts). The project has been viewed as one of the City's most successful IT implementations and resulted in the City gaining international recognition and winning multiple awards, the most recent being a 2019 Government Experience Award. The successes of that engagement can be attributed to the strong partnership formed between the Deloitte and Performance and Analytics team members, Deloitte's proven implementation methodology, our approach of keeping City stakeholders consistently engaged, and the talent and experience our Salesforce professionals bring to any engagement.



**Deloitte's Get It Done Expansion Team, 2018**

In addition to delivering the Expansion project, Deloitte is currently serving as the City's primary support vendor for Get It Done, where we are continuing to provide the City with high quality technical services. Our onsite lead is responsible for triaging and assigning incidents to his technical team for resolution and works side by side his Performance and Analytics counterparts in delivering new change requests. In the last year, Deloitte's support team deployed over 400 Get It Done enhancements into production, allowing the City to quickly adjust to the everchanging needs of its constituents and employees.

Deloitte is excited for this opportunity to serve and support the City of San Diego and Get It Done in a greater capacity, and we have the experience and resources available to handle anything the City needs. We are a globally recognized Salesforce Platinum Partner and our 6,000+ Salesforce professionals have supported hundreds of clients implement Salesforce in award-winning fashion. We received Partner Innovation Awards in 2017 and 2018, have also received Salesforce's Top Global Systems Integrator Award. We know Salesforce, and we know it well.

Deloitte's approach to addressing the scope of work described in the RFP is outlined in the sections below. It includes onsite Leads for both the Support and Enhancement Teams, 24/7/365 coverage to resolve major incidents, and an enhancement/project evaluation process that is designed to be fair and flexible, while minimizing risks to the City and Deloitte. We trust that the City will be pleased with our response, and we look forward to discussing it further.



# Company Background

Deloitte is the world's largest Professional Services Firm with an award-winning Salesforce practice.

## Company Profile: Deloitte Consulting LLP

<b>Company Ownership</b>	Deloitte Consulting LLP was incorporated in Delaware in 1996
<b>Location of Company Offices</b>	Global Office Locations: <a href="https://www2.deloitte.com/us/en/footerlinks/office-locator.html">https://www2.deloitte.com/us/en/footerlinks/office-locator.html</a>
<b>Local Office Address</b>	655 West Broadway, Suite 700, San Diego, CA 92101
<b>Number of Employees</b>	Global: 263,000+ United States: 46,000+ Government and Public Services: 12,000+
<b>Contract Point of Contact</b>	Thomas Beyer, Principal Phone: (619) 232-6500; Email: thbeyer@deloitte.com

Table 1. Company Profile.

## Deloitte Background and History

The history of our organization dates back to the merger of Deloitte, Haskins & Sells (founded in 1845) and Touche Ross (founded in 1947) in 1989. Our consulting division was established in 1995 – and renamed Deloitte Consulting LLP in 2003 as a limited liability partnership. Our business experience covers a broad range of successful implementations in state and local government sectors and many commercial industries, including health care, financial services, and consumer business.

As a recognized global leader in consulting, we deliver value to our clients across a host of industries and capabilities through our numerous practices. The expertise we have developed across our Technology, Strategy & Operations, and Human Capital capabilities provide a holistic value proposition to our clients.



We know that a track record of the firm the City chooses to support their integrated Get It Done solution is important. Deloitte is recognized by Gartner, Forrester, IDC, and Kennedy as a leader in CRM, industry transformation projects, and the #1 systems integrator for state and local governments. Most recently, Deloitte was named a global leader in CRM and Customer Experience Services for the sixth year in a row by Gartner. As the largest Public Sector systems integrator in the Salesforce ecosystem, we have access to the highest levels within the organization.

### **The Deloitte Difference**

Not only was Deloitte responsible for delivering the Get It Done Expansion and supporting the system since August of 2019, and are the current application maintenance provider, but we have experience in successfully implementing and supporting similar solutions in terms of function, scale, and complexity at other public agencies across the US. Just a few of those examples are provided in our references in a later section of this response. Furthermore, evaluating, designing, and deploying enhancements or larger projects within the complex Get It Done environment requires more than just a team with project management and technology skills. The main differentiators Deloitte brings to the City is our deep relationships with key department Points of Contact (POCs) and City leaders and nearly two years of experience already working with them in this capacity, as well as our intimate knowledge of the existing system.

Only Deloitte can deliver a team of proven and committed San Diego-based professionals who are committed fully to the City's success and will work together seamlessly with the various City departments to:

- Continue to design and develop an innovative, rich, yet simple user experience for each resident interaction with the system
- Bring acquired domain knowledge, technical expertise and seamless collaboration to lead application developers and deliver a transformative CRM solution
- Build and integrate leading digital technologies into the implementation that will coexist with existing City assets
- Effectively leverage Hybrid Agile principles and methodologies, which have been honed and proven in your environment, to deliver, train, and deploy a configured solution and platform
- Build upon the successes the City has had in collaboration with our team

**“Through Deloitte’s generous pro-bono work on the Hunger Free Hotline, more families are being connected to the food resources they need. Their team listened to various staff needs, designed customized updates to streamline our Salesforce system, then implemented and tested them flawlessly. Our frontline staff who work in the system have seen their efficiency and effectiveness improve resulting in enhanced customer service.**

**Kathy Underhill  
CEO, Hunger Free Colorado**



## Deloitte's Public Sector Experience

As a recognized leader in US State & Local Government consulting by Kennedy, Deloitte brings decades of project experience, presence in 44 states, and numerous subject matter experts on a variety of topics. The confidence of the public sector in Deloitte's capabilities is reflected in consistently being selected to work with states and their agencies on complex and high visibility initiatives. We have more than 3,500 practitioners who currently serve state and local governments.

## Deloitte Digital

Deloitte Digital is a bold and innovative part of Deloitte, sitting at the intersection of business, creative, and technology. With a global practice of more than 2,500 practitioners, we provide clients with a full suite of digital services, from CRM and multi-channel strategy, to web and mobile development. Building upon the core Deloitte values of integrity and collaboration, we focus on injecting innovation and creativity into our solutions to build tomorrow's digital business today, for you: our clients.

Several independent analysts have noticed our consistent track record of on-time, on-budget delivery and recognized our value-proposition:

- Leader in Customer Relationship Management
  - Gartner 2017
- Leader in Digital Innovation Consulting
  - ALM Intelligence 2017
- Leader in Business Transformation Capability
  - Forrester 2017

**2018 Magic Quadrant for CRM and Customer Experience Implementation Services, Worldwide**

Although it operates in conjunction with other service lines, Deloitte is particularly capitalizing on the IT aspect of state and local government consulting, recognizing the increasing need for analytic and cloud support to improve operations and identify areas for efficiency. Deloitte's experience level in these areas is particularly advantageous in promoting an overall digital strategy for its clients.

**Source: Kennedy Consulting Research & Advisory**



**Figure 1. Deloitte is a Worldwide leader in CRM and Customer Experience Implementation Services.**

Deloitte Digital capabilities (outlined below) are aligned with the skills needed to deliver the City's CRM solution:



CA\_City of San Diego\_GID Salesforce PADMS\_2019-005

**Figure 2. Deloitte Digital Capabilities.**

## Deloitte's Salesforce Experience and Alliance

Deloitte has a long history teaming with Salesforce. We began working with Salesforce as a go-to-market partner in 2006 and formed our official Global Alliance in 2010. This means our two organizations work hand-in-hand to support our clients in delivering the best possible service and outcomes.



Since Deloitte's Salesforce practice began, we've focused on hiring the best practitioners, developing deep technical knowledge of the platform, and even helped shape new solution features and capabilities. Our practice is known worldwide for innovation and platform expertise, earning us 25+ awards and analyst accolades.

Some Practice Highlights:

- **4000+** Salesforce practitioners in over 30 countries, Deloitte brings deep industry insight, proven customer solutions experience, and Salesforce know-how.
- **700+** CRM projects in the last **5** years, including nearly **100** Public Sector projects.
- Robust onshore and offshore delivery centers allow for round the clock development.
- **Major Salesforce Hub and Digital Studio in Denver** for quick access to expertise on Salesforce architecture.
- **15-year history** of teaming with Salesforce and being a premier implementation partner- **announced collaboration Salesforce Assets and Solutions group** to jointly develop solutions and guide solution direction.
- Increased focus on **social, mobile, artificial intelligence** in citizen interactions.
- 2018 Salesforce Lightning Master.
- **Recognized by Salesforce** in Sales Cloud, Service Cloud, Platform, Financial Services, Communications, Media, Healthcare & Life Sciences and Public Sector.



### DID YOU KNOW?

Key Facts about Deloitte's Alliance with Salesforce:

- 2018 Salesforce Consulting Partner Innovator Award
- 2017 Salesforce Partner Innovation Award
- 2016 Salesforce Partner Innovation Award
- 2016 Service Cloud Trailblazer Award

# Response to Exhibit B Scope of Work

## Confirmation of Our Understanding of the Scope of Work (A-C)

Deloitte acknowledges the scope of work and takes responsibility for the maintenance and enhancements of the City's Get It Done/Salesforce system by leveraging the continued partnership with the City and approaches that have led to a successful platform. We will continue to use a Hybrid Agile implementation methodology to capitalize on the benefits of iterative design and build cycles while following a planned and predictable timeline. This approach will allow Deloitte to provide the City of San Diego with effective maintenance of the system and its integrations while simultaneously deploying new enhancements and features.



**Arun Ganesan (Deloitte) and the City Performance and Analytics Team**

The Get It Done ecosystem consists of numerous integrations, which not only need to be maintained, but also expanded. With our approach and pre-existing knowledge of the systems, Deloitte can rapidly develop new solutions. To properly enhance a system, relationships must be forged between all parties involved with the environment to understand all requirements and Deloitte can leverage the already existing relationships to accomplish and fulfill them.

## Transition Plan (D)

### Overview

Our team is already on the ground supporting the Get It Done ecosystem, and the minimal transition effort required allows our and the City's combined team to maintain momentum on the operations and modernization activities in flight. Our primary transition responsibilities are to effectively transition and maintain ongoing system operations, collaborate with the City on a detailed future vision and strategic plan, implement system enhancements, and place continued emphasis on client and end user service delivery and experiences.

Transitioning to a new vendor will require additional effort for City staff. Instead of placing energy into a transition, the City has the opportunity to put that energy and effort into focusing on the future. Since limited transition activities are required, Deloitte will provide services without delay to any expected timelines. We can continue to transform our processes and build out the vision for Get It Done across stakeholder groups while keeping aligned to the City's goals of improving the quality of City services, increasing resident engagement, and offering better experiences to its constituents and employees.

## Meeting Transition Requirements

Given that Deloitte is the incumbent vendor providing support for Get It Done, we propose a limited transition focused on meeting new requirements that are not currently met under the existing contract. To successfully fulfill requirements and new enhancements, team members will be onboarded onto the project. Leveraging the knowledge of already existing project members, Deloitte will be able to minimize the knowledge transfer time and begin to develop and plan large enhancements immediately. Experienced team members can continue working on necessary maintenance of the system while participating in enhancement discussions on an as-needed basis.

A large-scale transition can be a good thing when the system is in a state of disrepair or the relationship with the current vendor is fractured. But that is not the case with Get It Done. The system has been stable from an end user perspective, the quality of enhancement releases is above industry standards, and our teams are working more collaboratively than ever before. By choosing Deloitte, the City is choosing to keep this momentum going and to build on it.

The City benefits from a team that has been fully focused on application maintenance and enhancement services and will continue to be so from Day 1 of the new contract. Enhancement projects will not be delayed or put at risk by taking the focus off of development activities in favor of knowledge transfer and handover activities. Additionally, Deloitte will immediately begin working with the City to prioritize and deliver the larger enhancements that have previously required discretionary projects to support.

## Transition Considerations

Deloitte's experience working with the City of San Diego and the Get It Done application, as well as transitioning large, complex application maintenance and technical operations from incumbent vendors in other government agencies, has provided us with a repository of lessons learned for the City to consider when transitioning a project of this size and complexity:

- **Understanding Intricacies:** Deloitte, as your current vendor, brings intimate understanding of the intricacies of the system and its integrations (e.g. SAP EAM, ESRI GIS, etc.), a new vendor will take months to learn these.
- **Time Spent on Teaching New Vendor:** Both the City and Deloitte will spend productive hours to educate and "prepare" the new vendor instead of progressing on enhancing Get It Done.
- **Cultural Fit:** We have spent two years learning how to work together and function as a collaborative and effective team. When a new vendor is engaged, new relationships must be built and new work styles adjusted to, which takes time, energy, and patience – and sometimes requires changing vendor resources in order to match your workplace expectations.

There can be potential risks during a transition to a new vendor in areas like steady state operations, the various system integrations, reporting, interfaces, and customers receiving benefits in a timely manner. In addition, by choosing to continue with Deloitte, the City's enhancement projects can continue their course.

# Baseline Support Team Requirements and Approach (E)

Deloitte will perform Maintenance and Development activities as summarized in the below figure.



**Figure 3. Scope of Services.**

As part of the Services noted above, Deloitte resources will:

- Respond to all assigned incidents (“Assigned Incidents”) for the In-Scope Applications shown above in Figure 3 and which are directly related to the Services as defined in this response.
- Work on Priority 1 through 5 Assigned Incidents related to Level 2, 3, and 4 support for the In-Scope Applications and align towards the service level requirements and fee reduction weighting factor mentioned in the RFP.
- Provide support consisting of the following activities:
  - On-site lead to answer phone calls from City’s Helpdesk for Priority 1 and Priority 2 reported incidents and respond to Deloitte assigned user entered incidents in the service management system (Service Desk).
  - Deloitte to open a conference bridge and communicate the Incident details to the Client’s Incident management contact group.
  - Contact Client Salesforce Lead and/or Key Contacts for further clarification of the incident if any.

- Deloitte will perform the Initial analysis of the Incident and if identified as a Get It Done problem, work towards the resolution and resolve the Incident and provide the Root cause analysis (RCA) as per the agreed upon SLA.
- If identified as an Integration System issue, the respective integration team to be invited on the bridge and do a warm transfer of the ticket. In such cases, the responsibility of the RCA for the Incident remains with the Integration system team.
- On-site lead to maintain current status on Priority 3 to 5 incidents assigned to Deloitte in the service management system and their progress towards resolution as per the agreed upon SLA.
- Fix and test the resolution of each incident and work with other Client members or the software vendor support specialists to implement the resolution and achieve closure using specific procedures (for example, moving objects/fixes from Development Sandboxes to UAT Sandbox and to Production tenants).
- Document changes made in accordance with the process using agreed upon standards.
- Deloitte will facilitate the transfer of tickets that are determined to be infrastructure or 3rd party issues back to the appropriate assignment group for resolution. Once the ticket has been transferred, Deloitte will work with the Client and 3rd party to provider to deliver relevant documentation of the issue and will assist Client with testing; however, the Client and 3rd party vendor will be responsible for resolving these defects. Client will manage the overall relationship with any third-party provider who provides services relevant to the Services described in this SOW.
- Salesforce Enhancement Support – Deloitte Baseline Support team will support small enhancements when no major incidents are pending, or as agreed upon with the City.
- Salesforce Release Support – Deloitte will work with the assigned Client’s release manager, if directed by Client Project management, to support Client’s release management activities related to our scope of services:
  - Review of new and enhanced functionality – Deloitte may work with the Client to review and assess the release notes (both the early and final notes) and may provide recommendations to Client’s Release Manager.
  - Evaluate opportunities and impact –Deloitte may assist Client’s Release Manager to evaluate changes, investigate impacts to current setup, and recommend solutions in in-scope support areas.
  - Release Planning - The Deloitte team lead may assist Client’s Release Manager in developing release plans.
  - Release Regression Testing – Deloitte may provide regression testing support at the direction of the Client Release Manager for Deloitte in-scope activities.
  - Weekly Release – In addition to any larger release planning effort, Deloitte may assist the Client Release Manager in reviewing the weekly release notes from Salesforce and following up on possible system impacts.



- Participate in defined and mutually approved Project Governance meetings as reasonably requested by the Client, such as:
  - Prioritization and status meetings
  - Change Advisory Board meetings

Support Levels

The table below defines the levels of support for the In-Scope Applications and Integration systems and indicates responsibility for execution between Client and Deloitte. For Level 2 through 4 services, Deloitte will work on break-fix issues and enhancements based on priority and severity as mentioned in the above SLR and fee weighting reduction factor table.

Level of Support	Responsibility	Description of Support Services
<b>Level 0</b>	<b>Client</b>	Initial Incident resolution support provided from super use, end users and self-service methods. Where super users cannot resolve an issue, they will contact and report the incident to Client’s Customer Support (Help Desk) resources.
<b>Level 1</b>	<b>Client</b>	Addresses “how-to” type questions, user access management, and provides Incident triage, severity assessment, and escalation. Responsible for routing tickets to Level 2/3 resources.
<b>Level 2</b>	<b>Deloitte and Client</b>	Investigates and performs Service restoration. Performs break-fix resolution, root cause analysis, configuration changes, security changes and other associated tasks. Validates production after Salesforce maintenance windows.
<b>Level 3</b>	<b>Deloitte and Client</b>	Highest point of Incident escalation and consists of service restoration, root cause analysis, associated integration changes, tenant configuration changes. When required, liaison with Salesforce for resolution.
<b>Level 4</b>	<b>Deloitte and Client</b>	Minor enhancements, defined as less than 80 hours of effort unless otherwise agreed to by the Service Delivery Leadership, and/or change requests, subject to team capacity and Client prioritization. This would include Salesforce release regression testing and associated changes.

**Table 2. Support Levels.**



## Service Delivery Model

Deloitte will use the below table to prioritize incidents and deliver within the agreed upon SLA.

ID	SLR	Service Measure	Performance Target	Minimum Performance	Measurement Interval	Reporting Period	Formula	Measurement Tool	Fee Reduction Weighting Factor
<b>Incident Resolution SLRs</b>									
1	Time to Notify Client of a Priority 1 or 2 Incident	Time to respond	Priority 1 <15 minutes Priority 2 <60 minutes	Priority 1 95.0% Priority 2 100%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	0%
2	Incident Resolution - Priority Level 1	Time to Resolve	<4 hours <8 hours	95.0% 98.0%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	25%
3	Incident Resolution - Priority Level 2	Time to Resolve	<8 hours <16 hours	95.0% 98.0%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	20%
4	Incident Resolution - Priority Level 3	Time to Resolve	<3 Business Days or within an agreed upon time frame	95.00%	Weekly	Monthly	Performance = Number of transactions completed within minimum performance	ServiceNow	10%
5	Incident Resolution - Priority Level 4	Time to Resolve	<5 Business Days or within an agreed upon time frame	95.00%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	0%
6	Incident Resolution - Priority Level 5	Time to Resolve	<10 Business Days or within an agreed upon time frame	95.00%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	0%
7	Root Cause Analysis	Time to report	Within 24 hours of Incident Resolution for Priority Level 1 or 2	95.00%	Weekly	Monthly	Number of requests completed within performance target/total of all requests occurring during Measurement Interval	ServiceNow	0%
<b>Customer Satisfaction SLR</b>									
8	Overall Satisfaction with Application Support Services	Satisfaction Level	All responding Client personnel should be very satisfied or satisfied with services	90%	Measure Quarterly, Report Quarterly	Quarterly	Sum of survey result from each participant/Total number of participants responding to Scheduled Survey	Survey Monkey or ServiceNow	10%

**Figure 4. Service level Requirements (SLR) and Fee Reduction Weighting Factor.**

The City will perform its business within the Production Environment. Any Incident fixes or Minor enhancements will be deployed in lower environments and allow business to validate for promoting to Production. Incidents and enhancement requests will only be initiated by logging the request in ServiceNow & Agile Tracker respectively.

The Deloitte and City responsibilities related to Incident Management & Minor Enhancements are set forth in the RACI Chart below:

- **Responsible (R):** Those who do the work to complete the task.
- **Accountable (A):** The one ultimately answerable for the correct and thorough completion of the deliverable or task, the one who ensures the prerequisites of the task are met and who delegates the work to those responsible. In other words, an accountable must sign off (approve) work that responsible provides. There must be only one accountable specified for each task or deliverable.
- **Consulted (C):** Those whose opinions are sought, typically subject matter experts; and with whom there is two-way communication.
- **Informed (I):** Those who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication.



Support Team RACI		
Activity/Task	Deloitte	City of San Diego
Update tickets as necessary to promote accuracy and keep Ticket status current for assigned Tickets	R, A	C, I
Respond, test and resolve assigned Tickets consistent with agreed to Key Performance Indicators and provide agreed to documentation.	R, A	C, I
Work with the City to confirm priority of Enhancement Requests	R, A	C, I
Assess production migrations and environment refreshes	R, A	C, I
Communicate Production deployment schedules and release items to POCs	R, A	C, I
Communication to off-site resources on requirements and Incident details	R, A	C, I
Maintain Ticket accuracy and keep Ticket status current for assigned Tickets	R, A	C, I
Gather complete requirements on the change requests from the department POCs	C, I	R, A
Lead Ticket prioritization and change management meetings as well as maintaining tickets that are assigned to City resources or 3rd party vendor	C, I	R, A
Provide guidance to Deloitte in the prioritization and execution of the Services. Preform relevant testing and sign-off procedures	C, I	R, A
Manage City employees and vendors in connection with the Services	C, I	R, A

A = Accountable, R= Responsible, C = Consulted, I= Informed

**Table 3. Incident Management & Minor Enhancements RACI chart.**

Services will be provided by on-site resources and off-shore resources from Deloitte’s global delivery centers located in Hyderabad and/or Bengaluru, India.

## Hours of Coverage

Deloitte will provide onsite coverage from **09:00 am to 5:00 pm Pacific Time** Monday through Friday. Offsite coverage from **5:30am to 9:30pm IST** (5:00 pm to 9:00am PST) Monday through Friday with resources working 8-hour shifts between the times noted above.

To meet the City’s 24/7 coverage requirement, Deloitte’s support for Priority 1 & Priority 2 incidents outside of these timings (includes public holidays & Deloitte holidays) will be achieved with on-call resources at both Onsite and Offsite. On-call roster will be maintained by Deloitte and shared it with Client on a regular basis. The figure below depicts the support coverage model for the requested RFP.



**Figure 5. Hours of Onsite and Offsite Coverage.**



## Enhancement/Expansion Team Approach (F)

### Team Organization

The proposed full-time Enhancement/Expansion Team will include three offshore Salesforce developers led by a “techno-functional”, onshore lead. This team will be supported by part-time management both onshore and offshore. Full details are outlined in the Section I Staffing Plan.

### Evaluation of Enhancement Requests

Prior to initiating any new project, a high-level evaluation will be conducted to assess its potential complexity and to validate that it falls within the Enhancement/Expansion Team’s scope of services. This evaluation also helps identify potential project dependencies and risks that may impact the success of the project.

The form below will be used to begin the new project evaluation:

The form is titled "Project Request Form" and is associated with "The City of SAN DIEGO". It is divided into two main sections: "PROJECT INFORMATION" and "FUNCTIONAL SCOPE DETAILS".  
**PROJECT INFORMATION**  
PROJECT NAME  
PROJECT DESCRIPTION  
DEPARTMENT OWNER  
PANDA LEAD  
TARGETED COMPLETION  
HIGH PRIORITY?  
**FUNCTIONAL SCOPE DETAILS**  
HAVE DETAILED REQUIREMENTS BEEN GATHERED?  
HAS PROJECT LEAD/CHAMPION BEEN IDENTIFIED?  
WILL MORE THAN 1 DEPARTMENT BE INVOLVED?  
IF SO, HOW MANY DEPARTMENTS?  
HAVE PROCESS SMES AND TESTERS BEEN IDENTIFIED?



The screenshot shows a form titled "TECHNICAL SCOPE DETAILS" with several questions and a "DATE RECEIVED" field. The questions are:

- ARE TECHNICAL SKILLS BEYOND CURRENTLY SUPPORTED TECHNOLOGY & FUNCTIONALITY REQUIRED?
- ARE NEW INTEGRATIONS IN-SCOPE FOR PROJECT?
- IF SO, WHAT SYSTEM(S)?
- ARE CHANGES TO EXISTING INTEGRATION(S) IN-SCOPE FOR PROJECT?
- ARE DATA CONVERSIONS NEEDED?
- DO NEW PUBLIC-FACING PAGES OR FORMS NEED TO BE CREATED?
- DO NEW EMAIL COMMUNICATION TEMPLATES NEED TO BE CREATED?

At the bottom, there is a yellow-bordered box labeled "DATE RECEIVED".

**Figure 6. New Project Request Form.**

Once the evaluation form is completed, Deloitte and the City will review the form together to determine the need for additional onsite or offsite resources to complete the new project. During this review, the following considerations will be discussed:

- Are there other projects being executed in parallel? If so, is there enough capacity remaining to support an additional project?
- Are there any similar projects impacting the same components that could be delivered in parallel for efficiencies?
- Is a high-level of department interaction required to be successful?
- Who will own test script development and test management?
- Is this a highly-visible or impactful project?

Additional considerations may exist and can be added if both the Contractor and City agreed to them.

If it is mutually determined that the new project cannot be successfully executed without additional resources, the City will have the option to work with the Contractor to execute a Change Order that will either add resources to the existing Enhancement/Expansion Team or form a brand-new project team specifically focused on the delivery of the new project.



## Estimating Project Hours Before Development

If it is mutually determined that the new project can likely be supported by the Enhancement/Expansion Team, the following activities will take place:

- If detailed requirements have not yet been gathered and the City is evaluating whether to proceed with a project, a high level “rough order of magnitude” (ROM) may be requested to estimate the level of effort required, before proceeding with detailed requirement gathering or a technical LOE.
- If detailed requirements have not yet been gathered, the Enhancement/Expansion Team can move forward with formal requirements gathering with the appropriate department stakeholders. Once the detailed requirements have been gathered, the Enhancement/Expansion Team must complete a Technical LOE estimate to determine the project’s complexity and duration (based on the capacity of the team).
- If detailed requirements have been gathered, the Enhancement/Expansion Team must complete a Technical LOE estimate to determine the project’s complexity and duration (based on the capacity of the team).

## Maximum Development Hours

The Enhancement/Expansion Team will be limited to projects that are less than or equal to **2,000 hours**. This limitation is established to avoid overloading the onsite lead and to help maximize project success. The 2,000-hour limitation may be waived based on mutual agreement between the City and Deloitte.

For projects exceeding the LOE limit set above, the City has the option to issue a Change Order to either augment the Enhancement/Expansion Team with additional resources or form an entirely separate project team responsible for its delivery.

## Project Request Contract

Once the scope, timeline, and cost of a new support project is mutually agreed upon, a Project Request Contract is completed and signed. Please refer to the sample project request contract below to see a sample staffing model and pricing details:



<b>Project Request Number: #</b>	<b>Date: 1/1/2020</b>	<b>Project Name: Get It Done – &lt;Name of the Project and Department&gt;</b>
----------------------------------	-----------------------	---

**Project Description:**

The scope of the project is listed down here which will include the expectation from Deloitte. This section should include either:

- Detailed requirements/ User Stories accompanied with process flows explaining the business requirements.
- High level requirements to evaluate scope of the project and include discovery/ requirements gathering phase in the project to identify detailed requirements.

Based on the finalized requirements, Deloitte will provide the City with a level of effort (LOE) estimate for the implementation of the requirements into Get It Done / Auxiliary org. This LOE estimate will allow the City to budget and seek approval for the implementation project from the appropriate approval groups.

Should the appropriate project and budget approvals be received, Deloitte will ramp up the appropriate resources (defined in the LOE estimate) to begin the implementation project quickly thereafter.

**Timeline:**

Below is the high-level schedule for this project (Example for illustration purpose only)

Week 1	Week ...	Week ...	Week ...	Week ...	Week ...	Week ...	Week...
Dates	Dates	Dates	Dates	Dates	Dates	Dates	Dates
Analyze / Discovery							
	Build and Test						
				UAT			
					Go-Live		
						Hypercare	

**Resources:**

The following resource will be assigned to support this engagement:

- 1 Deloitte Manager to serve as Project Manager – Full Time (X Weeks/ Months)
- 1 Deloitte Senior Consultant to serve as Functional Lead – Full Time (Y Weeks/ Months)
- 1 Deloitte Senior Consultant (Offshore) to serve as Technical Lead – Full Time (Z Weeks/ Months)
- 3 Deloitte Consultants (Offshore) to serve as Salesforce Developers – Full Time (A Weeks/ Months)
- 1 Deloitte Consultant (Offshore) to serve as QA Lead – Full Time (B Weeks/ Months)
- 1 Deloitte Consultant (Offshore) to serve as Front End Developer – Full Time (C Weeks/ Months)

**Deliverables:**

Due at the end of this engagement will be the:

1. Deliverable 1 - Complete set of functional requirements for the <Process Area>
2. Deliverable 2 – Solution Design Document
3. Deliverable 3 – Training materials (if required)

Assumptions (All assumptions will be captured here):

- Deloitte will lead all deep dive / requirements gathering workshops
- Deloitte will utilize the City's Agile Accelerator tool to capture requirements
- Requirements will be captured in the form of User Stories and Acceptance Criteria



<ul style="list-style-type: none"> <li>The City's departments (Performance and Analytics, Environmental Services, and Police) will allocate the appropriate subject matter experts (SMEs) to attend the requirements gathering sessions</li> </ul>																																															
<b>Project Schedule:</b> This project will be conducted <Start Date> through <End Date>																																															
<b>Project Fees:</b> The cost of this engagement will be \$<Price> Cost breakdown based on Deloitte rate card (from 311 Project):																																															
<table border="1"> <thead> <tr> <th>Resource</th> <th>Per Day</th> <th>Days</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Project Manager (Deloitte Manager)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td>Functional Lead (Deloitte Senior Consultant)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td>Technical Consultant (Deloitte Senior Consultant)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td>Technical Consultant (Deloitte Offshore Senior Consultant)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td>Technical Developer1 (Deloitte Offshore Consultant)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td>Technical Developer2 (Deloitte Offshore Consultant)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td>Technical Developer3 (Deloitte Offshore Consultant)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td>Technical QA Lead (Deloitte Offshore Consultant)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td>Technical Front-End Developer (Deloitte Offshore Consultant)</td> <td>Rate per RC</td> <td>&lt;Days&gt;</td> <td>\$&lt;Amount&gt;</td> </tr> <tr> <td><b>Total</b></td> <td></td> <td></td> <td><b>\$&lt;Grand Total&gt;</b></td> </tr> </tbody> </table>				Resource	Per Day	Days	Total	Project Manager (Deloitte Manager)	Rate per RC	<Days>	\$<Amount>	Functional Lead (Deloitte Senior Consultant)	Rate per RC	<Days>	\$<Amount>	Technical Consultant (Deloitte Senior Consultant)	Rate per RC	<Days>	\$<Amount>	Technical Consultant (Deloitte Offshore Senior Consultant)	Rate per RC	<Days>	\$<Amount>	Technical Developer1 (Deloitte Offshore Consultant)	Rate per RC	<Days>	\$<Amount>	Technical Developer2 (Deloitte Offshore Consultant)	Rate per RC	<Days>	\$<Amount>	Technical Developer3 (Deloitte Offshore Consultant)	Rate per RC	<Days>	\$<Amount>	Technical QA Lead (Deloitte Offshore Consultant)	Rate per RC	<Days>	\$<Amount>	Technical Front-End Developer (Deloitte Offshore Consultant)	Rate per RC	<Days>	\$<Amount>	<b>Total</b>			<b>\$&lt;Grand Total&gt;</b>
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City of San Diego  Signature: Printed Name: Title: Program Manager Date:		Deloitte Consulting LLP  Signature: Printed Name: Title: Lead Engagement Partner Date:																																													

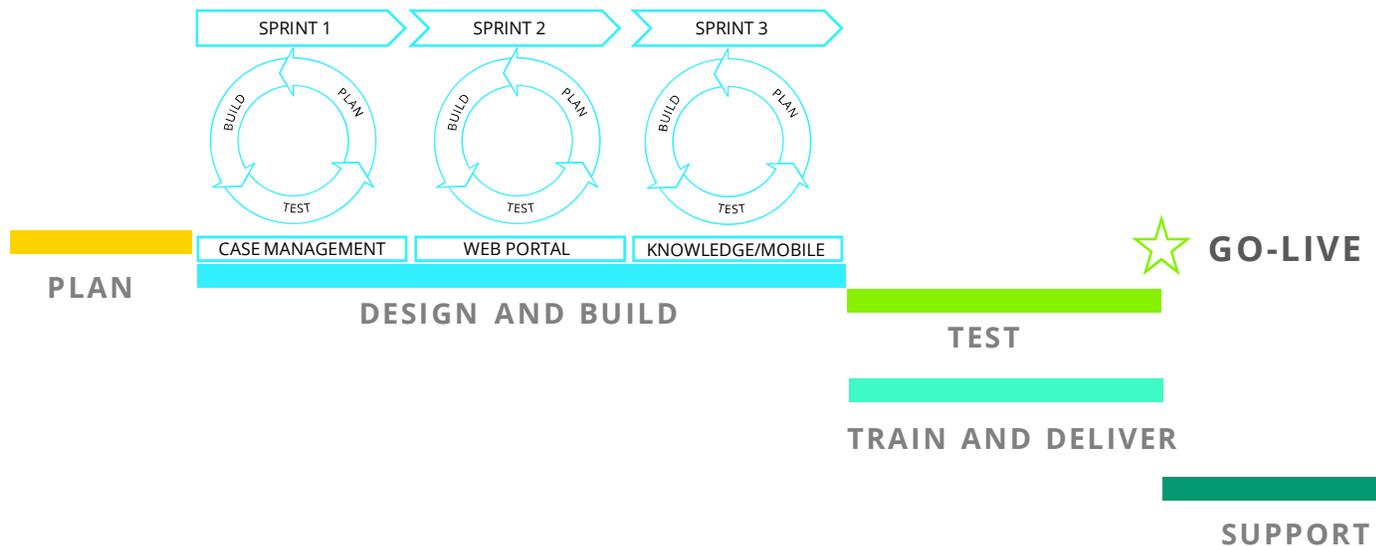
**Table 4. Sample Project Request Contract.**

## Delivery Methodology

Once a project has been approved to proceed, the Contractor will leverage the same Hybrid-Agile delivery methodology that was used to implement the Get It Done Expansion project. With detailed requirements already approved and signed off as part of the Project Evaluation and Approval processes, the team will begin with a brief Planning Phase prior to jumping straight into Design and Build. Once the Design & Build Phase has been completed, the project will transition into Testing, followed by Training, Deployment, and Post-Go-Live Support (A.K.A. Hypercare).

## Project Delivery Phases

Below is an overview of the phases of each new project once requirements have been signed off, a timeline has been accepted, and the project has been approved:



CA\_City of San Diego\_GID Salesforce PADMS\_2019-001

**Figure 7. Example of Project Delivery Phases.**

### Plan

The Enhancement/Expansion Team and the City develop and refine the project plan, so that both parties have a detailed understanding of the timing of key activities. The also serves as an opportunity to make any adjustments. The planning phase will also be used for the City to coordinate with 3rd party vendors and finalize the identification of key project stakeholders and SMEs.

Key activities include:

- Communicate project timeline and stakeholder expectations to department
- Confirm department SMEs and stakeholders for Design and Build Sessions

- Coordinate with 3rd party technical groups (if applicable)
- Project Kick-Off with department stakeholders and SMEs

### Design and Build

The Enhancement/Expansion Team and the City will conduct a series of Design and Build sprints to iteratively develop design specifications and configure the application based on the detailed requirements captured during the Analyze phase and feedback from key stakeholders during design and build sessions. In addition, the Enhancement/Expansion Team will perform systems unit testing throughout this phase to ensure the solution is ready for Testing with City users.

Key activities include:

- Facilitate Design & Build meetings
- Provide design feedback on prototypes and address design questions
- Develop/build solution
- Coordinate 3rd party design and development activities (if applicable)

### Test

The Test Phase will be broken up into two distinct sub-phases: Unit Testing and User Acceptance Testing. Unit Testing will be conducted by Deloitte prior to handing off to the City for testing. When requested by the City, Deloitte will provide screen shots to demonstrate successful test results. User Acceptance Testing will be executed by City testers to verify the solution and its integrations are functioning as intended and to validate all functional requirements have been met. User Acceptance Testing will be managed by the City and focus on testing full end-to-end business scenarios to verify system usability and culminate with user acceptance sign-off.

Key activities include:

- Identify and confirm department testers
- Develop test scripts for testing
- Execute test scripts / test scenarios
- Identify and document test defects
- Resolve technical defects
- Testing sign-off

### Train and Deliver

The Enhancement/Expansion Team will support the City in preparing for go-live by conducting necessary go-live preparation and deployment activities. Deployment activities consist of environment readiness, completion of end-use training, data conversion, and system smoke testing.

Key activities include:

- Develop required training materials (if required)
- Department training
- Document Salesforce deployment activities and timing
- Communicate deployment activities and timing with department stakeholders
- Execute deployment activities during cutover

### Post Go-Live Support Phase

After deployment, the project will transition into a support phase where the project team will support the City in the new environment. The duration of this support phase will be mutually agreed upon prior to the start of the project, but can be adjusted, capacity permitting. Activities during this phase consist of completing critical and high bug fixes and if capacity permits, deploying of minor enhancements.

Key activities include:

- Report system defects/incidents
- Resolve systems defects related to Salesforce functionality
- Coordinate resolution of 3rd party defects with 3rd party vendor
- Complete knowledge transfer to Salesforce Support Team

### Change Request Process

A standard change request process will be followed should changes to the agreed upon requirements be requested after a project has been approved. This process will assess the business impact of not making the change, the technical level of effort required to make the change, and the overall impact to the project and its timeline if the change is approved.



**Figure 8. Change Request Process.**



## Roles and Responsibilities

The City and Deloitte will have either primary or secondary responsibility for the tasks identified below.

- **Responsible (R):** Those who do the work to complete the task.
- **Accountable (A):** The one ultimately answerable for the correct and thorough completion of the deliverable or task, the one who ensures the prerequisites of the task are met and who delegates the work to those responsible. In other words, an accountable must sign off (approve) work that responsible provides. There must be only one accountable specified for each task or deliverable.
- **Consulted (C):** Those whose opinions are sought, typically subject matter experts; and with whom there is two-way communication.
- **Informed (I):** Those who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication.

The below tables outline the responsibilities of both Deloitte and the City by project phase:

Project Assessment and Approval		
Activity/Task	Deloitte	City of San Diego
Complete New Project Request Form with inputs from department stakeholders	C, I	R, A
Review New Project Request Form for initial complexity evaluation	R, A	C, I
Identify potential risks associated with new project	R, A	C, I
Determine if Enhancement/Expansion Team has capacity to support new project or if additional resources may be required	R, A	C, I
Approve Enhancement/Expansion Team to move forward with requirements gathering/validation	C, I	R, A
Requirements Gathering & Validation		
Activity/Task	Deloitte	City of San Diego
Facilitate contractor-led requirements gathering workshops (deep dives) – If required	R, A	C, I
Facilitate department-led (City) requirements gathering – If desired	C, I	R, A
Setup required department meetings for requirements gathering or requirements validation	C, I	R, A
Confirm appropriate stakeholders are present for requirements-related meetings	C, I	R, A
Confirm requirements are detailed enough for proper LOE estimation	R, A	C, I
Sign-off on final project requirements	C, I	R, A
LOE Estimation and Final Approval		



Activity/Task	Deloitte	City of San Diego
Complete detailed technical LOE estimation using approved requirements (for Contractor scope only)	R, A	C, I
Gather LOE from 3 <sup>rd</sup> party technical groups (if applicable) – for example, integration partners, City vendors, etc.	C, I	R, A
Review Enhancement/Expansion Team capacity to determine new project feasibility and timeline	R, A	C, I
If LOE <2,000 hours, approve project and project timeline	C, I	R, A
If LOE >2,000 hours, determine if City will move forward with Change Order to augment Enhancement/Expansion Team with additional resources	C, I	R, A

**Project Planning**

Activity/Task	Deloitte	City of San Diego
Communicate project timeline and stakeholder expectations to department	C, I	R, A
Confirm department SMEs and stakeholders for Design and Build Sessions	C, I	R, A
Coordinate with 3 <sup>rd</sup> party technical groups (if applicable)	C, I	R, A
Identify and confirm additional onsite or offsite resources (if required via Change Order)	R, A	C, I
Facilitate Project Kick-Off with department stakeholders and SMEs	Joint Responsibility	Joint Responsibility

**Design & Build**

Activity/Task	Deloitte	City of San Diego
Facilitate Design & Build meetings	R, A	C, I
Communicate and coordinate build with offsite technical resources	R, A	C, I
Provide design feedback and address design questions in a timely fashion (within 48 hours)	C, I	R, A
Develop/build solution (within Salesforce or systems within Contractor scope for project)	R, A	C, I
Coordinate 3 <sup>rd</sup> party design and development activities (if applicable)	C, I	R, A

**Testing**

Activity/Task	Deloitte	City of San Diego
Identify and confirm department testers	C, I	R, A
Develop test scripts for testing	C, I	R, A
Execute test scripts / test scenarios	C, I	R, A
Identify and document test defects	C, I	R, A



Communicate 3 <sup>rd</sup> party defects to City (if applicable)	R, A	C, I
Resolve technical defects and communicate fixes to testers (within Enhancement/Expansion Team's scope)	R, A	C, I
Coordinate defect fixes with 3 <sup>rd</sup> parties (if applicable)	C, I	R, A
Monitor department testers and their adherence to testing timeline	C, I	R, A
Provide testing sign-off	C, I	R, A
<b>Training</b>		
<b>Activity/Task</b>	<b>Deloitte</b>	<b>City of San Diego</b>
Develop required training materials (if required)	C, I	R, A
Coordinate with 3 <sup>rd</sup> parties (if applicable) regarding training	C, I	R, A
Address functional questions and provide input for training materials	R	A, C, I
Lead department training	C, I	R, A
Support department training	R	A, C, I
Confirm training is completed and department is ready for deployment	C, I	R, A
<b>Deployment</b>		
<b>Activity/Task</b>	<b>Deloitte</b>	<b>City of San Diego</b>
Document Salesforce deployment activities and timing	R, A	C, I
Coordinate with 3 <sup>rd</sup> parties regarding deployment activities and timing	C, I	R, A
Communicate deployment activities and timing with department stakeholders	C, I	R, A
Approve final production deployment	C, I	R, A
Execute Salesforce deployment activities during cutover	R, A	C, I
Communicate the completion of project deployment activities	R, A	C, I
Coordinate 1 <sup>st</sup> department user's usage of system	C, I	R, A
<b>Post Go-Live Support (Hypercare)</b>		
<b>Activity/Task</b>	<b>Deloitte</b>	<b>City of San Diego</b>
Report system defects/incidents	C, I	R, A
Resolve systems defects related to Salesforce functionality	R, A	C, I
Coordinate resolution of 3 <sup>rd</sup> party defects with 3 <sup>rd</sup> party vendor	C, I	R, A
Complete knowledge transfer to Salesforce Support Team	R, A	C, I

**Table 5. Responsibilities by Project Phase.**

## Team Capacity

A weekly team capacity will govern the pace of the Enhancement/Expansion Team's project delivery. The pace is dependent on the number of resources on the team and if there are any other projects being executed in parallel.



## Baseline Weekly Capacity

The table below provides an overview of the Enhancement/Expansion Team's baseline weekly capacity the City included as part of this proposal:

Role	Work Type	Weekly Capacity	# of Resources	Total
Techno-Functional Lead	Functional	40	1	40
Salesforce Developer	Technical	40	3	120

**Table 6. Baseline Weekly Capacity of the Enhancement/Expansion Team.**

This weekly capacity will be used to estimate project timelines and to balance resources across multiple projects.

### Example – Single Project Estimation

If the City wants to pursue a single project, the project's timeline can be estimated as follows:

#### Sample Project LOE Details:

Role	Work Type	Weekly Capacity	# of Resources	Total
Techno-Functional Lead	Functional	40	1	40
Salesforce Developer	Technical	40	3	120

**Table 7. Sample Project LOE Details.**

	Analyze	Design & Build	Test	Train & Deploy	Support	TOTAL LOE
Functional	40	120	80	40	40	320
Technical		360	240	120	120	840

**Table 8. Total Project LOE.**

#### Timeline Estimation:

	Analyze	Design & Build	Test	Train & Deploy	Support			
WEEK	1	2	3	4	5	6	7	8
Functional	40	40	40	40	40	40	40	40
Technical	0	120	120	120	120	120	120	120

**Table 9. Functional and Technical Timeline Estimation by Phase.**

Based on the weekly capacity and the Sample Project LOE Details above, we can estimate the project to last 8 weeks. This includes 1 week of requirements gathering (analyze), 3 weeks of design and build, 2 weeks of testing, 1 week of training and deployment, and 1 week of support.

If the City wants to increase the weekly capacity of the team to accelerate development activities, a Change Order will be required.

## **Splitting Capacity Across Multiple Projects**

If the City chooses to pursue multiple projects at one time, capacity will need to be allocated to projects based on the City's preference. The Performance and Analytics Program Manager will be responsible for prioritizing competing projects and allocating the Enhancement/Expansion Team capacity to each project.

## **Salesforce Support Team Support**

In the event the City's Salesforce Support Team has additional capacity to support the Enhancement/Expansion Team during times of constrained capacity, the City could work closely with the Support Team Lead and the Enhancement/Expansion Team Lead to determine if allocating some of the Support Team's capacity to aid the Enhancement/Expansion Team is appropriate.

## **Team Performance Management and Monitoring**

Following the same cadence of the 311 Get It Done Expansion project and support team, the Enhancement/Expansion team will utilize Agile Accelerator to monitor and track progress from project start to finish. Requirements will be logged as user stories with related acceptance criteria. This will be validated by the city then developed by the Enhancement/Expansion Team. Once development and quality assurance testing are complete for each story, the city will execute test scripts from Agile Accelerator in a test environment to confirm the development meets the acceptance criteria. If an issue is found, the City will log a defect against the test script. The Enhancement/Expansion team will address defects before the City can then test and close it out. Once the City successfully passes the test scripts and the exit criteria is met, testing may then be extended to end-users. Separate scripts following business process steps will be written by the City and uploaded to Agile Accelerator. End-users will execute these scripts and follow the same testing lifecycle. Once UAT exit criteria is met, the development work can then be deployed to production.

## **Other Salesforce Orgs Approach (G)**

### **Approach**

When requested to provide maintenance services to the auxiliary orgs that the City owns and maintains, Deloitte will treat this as a discretionary project request and analyze and review requirements when provided and share a detailed Level of Effort estimation including a staffing model and project plan that will be required to successfully build, test, deploy and support the project post go-live (Hypercare). The estimation will be based on Deloitte's hybrid agile approach and will include a blend of onsite and offshore resources and will use the agreed upon rate card (Tab C Cost Proposal). If the requirements are not defined or lack clarity to effectively estimate, the team might estimate the development work at a high level and add a Planning/Discovery and

Analyze phase to define requirements with the key stakeholders and then fine tune the estimate of the project based on the requirements gathered.

## Considerations

When working on the non-primary orgs the following are some considerations:

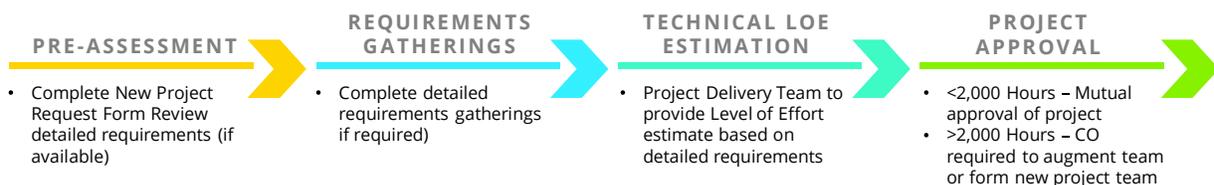
- Access to the production and sandbox orgs will be required for the Deloitte team to evaluate the target system.
- Detailed business requirements will be required to evaluate the scope and level of effort to build the project without a discover / analyze phase.
- Any data migration / integration tasks will need to be identified when defining requirements.
- Any restrictions/considerations around sharing data with offshore team members should be shared with the team prior to starting the engagement.
- Any deployment and Hypercare considerations like constraints around deployment windows/ synchronizing with other vendors will be shared with Deloitte in advance.
- Any collaboration required with vendors or contractors will be identified and shared with Deloitte.
- Any enhancements, and support post Hypercare will be considered as part of a separate contract and not the standard maintenance contract.

## Discretionary Projects Approach (H)

### Project Evaluation Process

The project evaluation process for discretionary projects is similar to the approach taken to evaluate enhancement requests outlined in the Enhancement/Expansion Team Approach section.

Discretionary project approach will evaluate projects that exceed the 2,000-hour limit. If the total effort causes the project to exceed the 2,000-hour limit, requiring additional resources, a Change Order will be required to augment the Project Delivery Team.



CA\_City of San Diego\_GID Salesforce PADMS\_2019-003

**Figure 9. Discretionary Project Evaluation Process.**

Prior to initiating any new project, a high-level evaluation will be done to assess its potential complexity and to validate that the project falls outside of the Enhancement/Expansion Team scope

of work. This evaluation will also help identify potential project dependencies and risks that may impact the success of the project.

A New Project Request Form will be completed for the all projects requested. Please reference the New Project Request Form in the Enhancement/Expansion Team Approach section above. Once the evaluation form is completed, we will work with the City to review the form together to determine the need for additional onsite or offsite resources to complete the new project. During this review the following considerations will be discussed:

- Are there other projects being executed in parallel? If so, is there enough capacity remaining to support an additional project?
- Is a high-level of department interaction required to be successful?
- Who will own test script development and test management?
- Is this a highly-visible or impactful project?

If it is mutually determined to move forward with the new project, the following activities can take place:

- If detailed requirements have not yet been gathered and the City is evaluating whether or not to proceed with a project, a high level “rough order of magnitude” (ROM) may be requested to estimate the level of effort required, before proceeding with detailed requirement gathering or a technical LOE.
- If detailed requirements have not yet been gathered, the Project Delivery Team can move forward with formal requirements gathering with the appropriate department stakeholders. Once the detailed requirements have been gathered, the Project Delivery Team will complete a Technical LOE estimate to determine the project’s complexity and duration (based on the capacity of the team).
- If detailed requirements have been gathered, the Project Delivery Team will complete a Technical LOE estimate to determine the project’s complexity and duration (based on the capacity of the team).

Once the project has been estimated and the City and Deloitte mutually agree to move forward with implementation (either with the Project Delivery Team, an augmented Project Delivery Team, or a new Project Team), the City will provide a formal sign-off on the detailed requirements gathered during the evaluation phase to lock in the project’s scope, and a Project Request Contract will be completed (See Enhancement/Expansion Team Approach section above for contract form).

Additional details related to level of effort estimations were included in the sections above (Other Salesforce Orgs; Enhancement/Expansion Team Approach). In some cases, the City may request a Prototype Process to allow for prototyping activities to be conducted as part of the requirement gathering process prior to requirement sign-off. The Prototype Process would be considered an activity that takes resources from the project team and time would need to be allocated accordingly. The intent of this activity would be to provide for preliminary planning that would allow for the project, once established, to proceed with a better-defined scope.

Should any changes to the signed-off requirements be requested during the delivery of the project, they will be handled through the change request process defined above in the Enhancement/Expansion Team Approach section.

## **Delivery Approach**

The delivery approach for discretionary projects follows the same delivery approach defined above in the Enhancement/Expansion Team Approach section. An additional onboarding process will be included in the Planning Phase for discretionary projects to onboard additional resources agreed to during the evaluation process. The onboarding process includes the following activities:

- Submission of potential team member resumes by Deloitte.
- Evaluation of proposed team member resumes by the City.
- Perform optional interview of proposed team member to allow the City to further evaluate candidates.
- City selects team members proposed by Deloitte. Team members are confirmed.

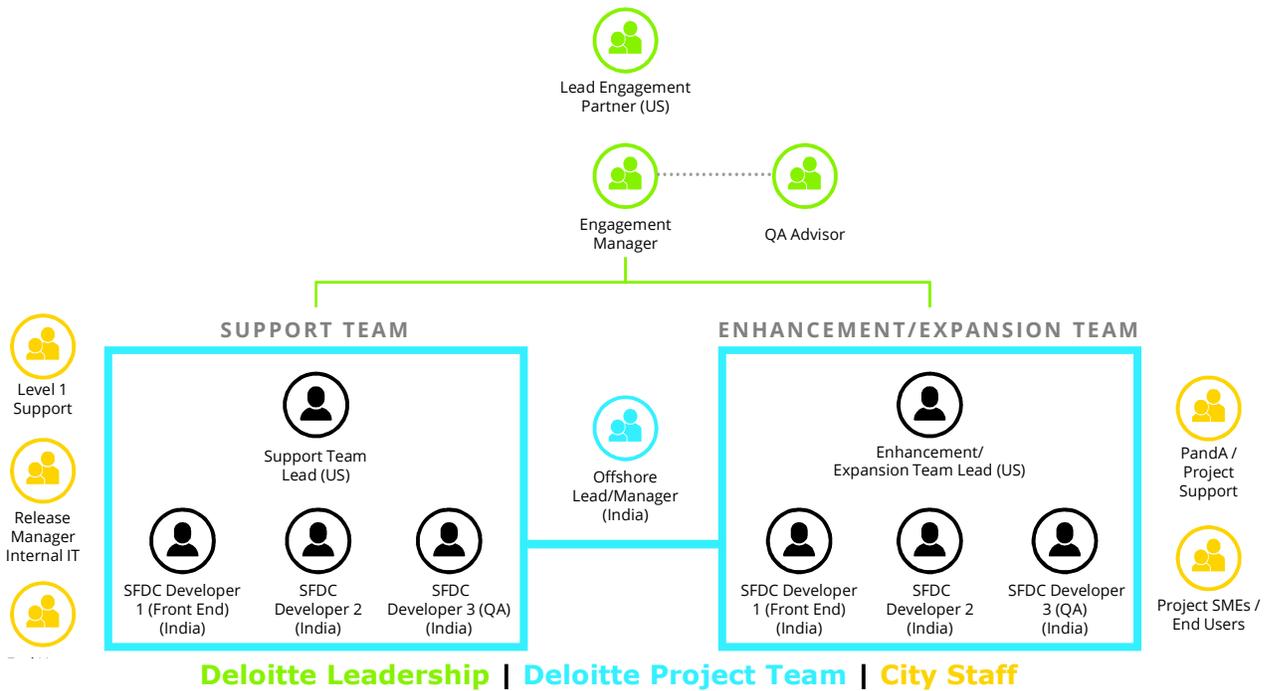
## **Discretionary Project Cost**

Hourly rates applied to discretionary projects are defined in Tab C – Cost/Price Proposal. Additionally, the City will have the option to leverage a Fixed Price or Time and Materials based billing structure.

## **Staffing Plan (I)**

### **Project Org Chart, Roles, and Responsibilities**

Deloitte is proposing an integrated project team and structure that encourages close collaboration between the City and Deloitte at each level of the organization. The following graphic outlines the team structure Deloitte is proposing, which is similar to the existing structure the City is used to.



**Figure 10. Proposed Project Team Structure.**

Deloitte also believes in strong transparency into the roles and expectations of all parties collaborating on the project. As such, the roles and responsibilities of these teams are outlined in the tables below. These will be reviewed further and refined in collaboration with the City during the planning phase of the project.

Role	Primary Responsibilities
<b>Lead Engagement Partner</b>	<ul style="list-style-type: none"> <li>Provides Overall strategic direction; accountable for engagement delivery and quality assurance</li> </ul>
<b>QA Advisor</b>	<ul style="list-style-type: none"> <li>Oversees engagement delivery and quality assurance; works closely with Engagement Partner and Team Leads to review services and provide best practices from other engagements</li> </ul>
<b>Engagement Manager</b>	<ul style="list-style-type: none"> <li>Serves as central point-of-contact for the engagement; responsible for engagement work products and activities</li> </ul>
<b>Offshore Lead/Manager</b>	<ul style="list-style-type: none"> <li>Manages day-to-day service delivery across US and India Hours for both teams</li> <li>Coordinates with key stakeholders to prioritize deliverables</li> <li>Monitors, tracks, and manages production issues across applications, technologies, teams, and provides oversight to overall direction</li> </ul>
<b>Support Team Lead</b>	<ul style="list-style-type: none"> <li>Interfaces with the Product Owner and Business Analyst to understand functional requirements</li> <li>Provide break/fix, release, development support, and integrations testing during US business hours</li> </ul>
<b>Enhancement/Expansion Lead</b>	<ul style="list-style-type: none"> <li>Interfaces with City project representatives and the offshore technical team in clarifying requirements and design questions</li> </ul>

Role	Primary Responsibilities
	<ul style="list-style-type: none"> <li>Responsible for Contractor's day-to-day project delivery activities</li> </ul>
<b>SFDC Developers</b>	<ul style="list-style-type: none"> <li>Develop the solutions defined in project requirements</li> <li>Responsible for technical development, defect resolution, and deployment activities</li> </ul>
<b>Performance and Analytics Project Support</b>	<ul style="list-style-type: none"> <li>Support onsite Team Lead with coordinating with City staff and 3rd parties</li> <li>Responsible for the oversight of City-owned activities</li> </ul>
<b>Project SMEs/End Users</b>	<ul style="list-style-type: none"> <li>Responsible for requirements definition, providing input during the Design &amp; Build Phase, and solution testing.</li> </ul>
<b>Level 1 Support Team</b>	<ul style="list-style-type: none"> <li>Directly interacts with Level 2 team for escalations</li> </ul>
<b>End Users, Business Team</b>	<ul style="list-style-type: none"> <li>Directly interact with Level 1 Team for support</li> </ul>

**Table 10. Project Roles and Responsibilities.**

## Deloitte Key Team Member Bios

Deloitte is proposing a team that has the necessary experience to both support the existing Salesforce platform as well as develop new capabilities. All of the Deloitte's team members proposed have either worked on the Get It Done Expansion implementation, the existing Application Development and Maintenance contract, or other Get It Done enhancement projects. We value continuity of our team members on client engagements and are committed to the successful delivery of this project with team members who have deep knowledge of the Get It Done Program.

In addition to skills and training, we recognize the importance of business chemistry and the role it plays in creating high performing teams. We are not just bringing resources that excel in what they do, but we are also cognizant to have identified and propose key team members who have successfully worked together in the recent past. With our proposed project team, the City of San Diego will have a cohesive team, that the City has built a high functioning business relationship with and is aligned with the goal of delivering a high quality and on time project. A team that is committed to helping the City find the best way to connect with and respond to its customers.

The table below shows the key personnel that we have identified to serve critical roles on this contract. These individuals are representative as we are not able to commit any specific individual at this phase of the proposal process. Additionally, we bring leadership advisors that will support the project management team and provide project directional recommendations to the steering committee. We provide bios for these advisors following the resumes at the end of this section.

## Leadership Bios

Role	Candidate	Experience Summary
<b>Lead Engagement Partner</b>		Thomas Beyer is a Principal in the Analytics and Cognitive practice of Deloitte Consulting. He has twenty years of experience in management and technology consulting. He served as the global eGovernment leader for many years and has worked with Governments in the US and across the world on the conceptualization, design and implementation of citizen-centered solutions and programs. His hands-on approach and knowledge of Government operations combined with his experience advising commercial companies has

Role	Candidate	Experience Summary
	<b>Thomas Beyer</b>	<p>enabled him to shape customer experience solutions, business analytics and technology implementations for clients around the world.</p> <p>Thomas has most recently served at the City of San Diego's Lead Engagement Partner for the Get It Done Expansion project, the existing Salesforce ADM Support project, Deloitte's Salesforce implementation at the Port of San Diego, and a transportation-related project at SANDAG.</p>
<b>QA Advisor</b>	 <b>Michael Henry</b>	<p>Michael is a local San Diegan and a leader in our State and Local Government Operate Practice. He has managed delivery of large Application Development and Maintenance programs for multiple State government agencies, including leveraging offshore delivery teams. He brings Deloitte standard best practices and proven approaches to support the dedicated team. Michael previously conducted a review with the existing Get It Done City team and has provided feedback and recommendations for ways to improve our service delivery and will continue to do so on this engagement.</p>

Table 11. Our Advisors.

## Core Project Team Resumes



# David Lindstrom

ENGAGEMENT MANAGER

### SUMMARY

David Lindstrom is a Senior Manager in the Deloitte Digital practice of Deloitte Consulting. He has over 9 years of experience implementing both on-premise and cloud-based ERP and CRM systems across several industries, including local government and non-profit. David's experience has focused primarily on sales and service-related processes, serving a process/functional lead on 5 large-scale CRM implementation projects in the last 4 years. His passion for understanding how his clients operate and transforming their processes by leveraging technology and industry leading practices allows him to deliver value on any engagement. Most recently David served as the Project Manager for the City of San Diego 311 implementation.



### RELEVANT EXPERIENCE

GET IT DONE

PROJECT MANAGER

**Scope:**

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

**Responsibilities:**



- Served as the project management of the Get It Done expansion
- Managed client relationships and coordinated deliverables
- Ensured the project met

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SAN DIEGO'S NEW CHILDREN'S MUSEUM      PROJECT MANAGER

**Scope:**

Deloitte worked with the New Children's Museum to analyze and support the "Visitor Experience" program. The project included surveying and interviewing museum guests and staff members, a highly interactive cocreation session with museum executives, and the development of a visitor experience improvement roadmap.

**Responsibilities:**

- Lead the coordination of gathering program requirements
- Lead an interactive workshop with program executives
- Worked to create a future state for the "Visitor Experience" program

**EDUCATION**

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- Bachelor of Science | Economics | California Polytechnic State University – San Luis Obispo



# Ganesh Neelakantan

TECHNOLOGY LEAD

## SUMMARY

Ganesh is a Salesforce Technical Architect and functional consultant with 9 years of experience on the Salesforce platform and 10 years of overall IT and CRM experience. He has led multiple cloud transformation engagements, successfully deploying Salesforce cloud-based CRM solutions for clients across Public Sector / Non- Profit, High Tech and Life Science industries. He has vast experience in Designing and Implementing Cloud based Enterprise Transformation Programs, leading all phases of the project from Blueprinting to Deployment. He is a Salesforce Certified Advanced Administrator, Administrator, App Builder and Service Cloud Consultant. He has completed his graduation from Visvesvaraya Technological University, Belgaum with a bachelor's degree in Electronics and Communication Engineering.

## RELEVANT EXPERIENCE

GET IT DONE

APPLICATION, ARCHITECT | TECHNICAL LEAD

### Scope:

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

### Responsibilities:

- Lead the Design, Development, Deployment and Maintenance of:
  - Public Facing Website and intake forms.
  - Case Management, Location Based Routing, Referrals
  - Work Order Management
  - Code Enforcement, Document Generation
  - Appointment scheduling for passport and Hazardous Material Disposal.
- Lead the Integration team to support integrations with:
  - GIS Maps, GIS Data, Google maps, Smarty Streets API
  - SAP Work order and case management
  - Payment Gateway
  - Accela
  - Twilio
  - NOAA

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APPLICATION ARCHITECT, INTEGRATION LEAD

**Scope:**

Deloitte partnered with the client to revamp their IT landscape with this transformation engagement About 700 legacy applications were retired and replaced with the state-of-the-art cloud enterprise applications to enable the client conduct business at a superior pace and achieve their exponential growth goals for 2020 and years to come.

**Responsibilities:**

- Led the Sales Cloud and Service Cloud application Design all the way from Blueprint phase through Design, Development, Testing and Go-Live.
- Implemented Marketing, Social Studio and Marketing execution integrations with external vendors.
- Design of custom outbound and inbound integrations integrating with the Neuron Enterprise Service Bus for optimal performance and scalability.
- Supported the client's customer facing website completely with Force.com back end.
- Designed a Customer and Partner community for partner users and Agency users to login and collaborate with internal teams.
- Mobile and Single Sign on setup on Salesforce.
- Develop design patters for UX design with due consideration for Experience, Mobile and Performance.
- Supported Cut-over planning and execution and multi country deployment across 40 countries.

## EDUCATION

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- Bachelor of Engineering | Electronics and Communication | VTU

## TRAINING AND CERTIFICATIONS

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- Salesforce Certified Application Architect
- Salesforce Certified Data Architecture and Management Designer
- Salesforce Certified Sharing and Visibility Designer
- Salesforce Certified Advanced Administrator
- Salesforce Certified Administrator
- Salesforce Certified Sales Cloud Consultant
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified Field Service Lightning Consultant
- Salesforce Certified Education Cloud Consultant
- Salesforce Certified Non-profit Cloud Consultant
- Salesforce Certified Platform App Builder
- Salesforce Certified Platform Developer I
- Agile Scrum Master



# Arun Ganesan

TECHNICAL LEAD

## SUMMARY

Arun has several years of experience in various CRM/IT implementations as Technical Project lead, Business Analyst and Domain SMEs. He is specialized in Salesforce Configuration (Custom Objects, Fields & Relationships, Validation Rules, Record Types, Page Layouts), Workflow & Approvals (WF Rules, Process Builder, Visual Flows, Approval Process), Reports & Dashboards. He has strong Salesforce administrator skills in User Management (Roles, Permission Sets, Profiles), Security Controls (OWD, Role Hierarchy, Automated & Manual Sharing Rules, setup Audit Trail), Data migration using Data Loader. He is experienced in implementing Visualforce Pages, Apex Classes, Apex Testing, Apex Triggers, SOQL & SOSL on the force.com platform. He has knowledge on Web services, SOAP, JSON, API based Application Integration. He has management skills on several CRM implementations across multiple domains in Sales and Services using Agile & Waterfall model. He creates and implements project plans, monitor risks, facilitate design discussions, coordinate leadership reporting, manage and control scope. He facilitates Communication, reporting, and escalation to key stakeholders from program leadership, IT and Business stakeholders. He manages a multi-disciplinary team on onshore and offshore consultants to deliver strategic project value. He is experienced in developing proposals and bids, project estimate, resource cost and duration estimations. He possesses excellent Leadership, Analytical, Problem Solving, Communication and interpersonal skills.

## RELEVANT EXPERIENCE

GET IT DONE

TECHNICAL LEAD

### Scope:

Deloitte engaged with the City of San Diego to support and enhance the Get It Done salesforce application. The application includes a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Enterprise Asset Management integration, ArcGIS Integration, Appointment Scheduling, Payment Gateway Integration, Twilio text messaging integration, Amazon S3 integration and Address validation.

### Responsibilities:

- As a Technical lead, manage the Incidents & Change Requests for the Get It Done Salesforce application.
- Investigates and performs Service restoration on P1/P2 incidents.
- Performs break-fix resolution, root cause analysis, configuration changes, security changes and other associated tasks.
- Validates production environment after Salesforce maintenance windows.
- Monitors daily scheduled batch jobs and performs necessary action as required.



- Maintains the Change Request logs with the appropriate status.
- Leads a team of offshore resources on the daily tasks/activities.
- Manages production deployment and lower environment maintenances.

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## GET IT DONE

## DATA CONVERSION LEAD

### Scope:

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Enterprise Asset Management integration, ArcGIS Integration, Appointment Scheduling, Payment Gateway Integration, Twilio text messaging integration, Amazon S3 integration and Address validation

### Responsibilities:

- As a Data conversion lead, led the Design and build of data migration jobs.
- Interacted with various City department stakeholders and worked closely with them to migrate data from Legacy systems to Get It Done
- Lead the efforts to migrate the below department specific data
  - Environmental Services
  - Food Establishment Waste Discharge
  - Transportation & Storm Water – Structural
  - Transportation & Storm Water – Industrial commercial
  - Office of City Clerk - Passport Appointments
  - Storm Water Code Enforcement

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## LEADING HEALTH PLANS

## FUNCTIONAL LEAD

### Scope:

Client, a leading health plan provider, wanted to build its own dedicated ASO Billing platform for its larger commercial clients. With an ASO plan, the employer funds the claim payments but pays client to process the claims. That relieves the employer of the responsibility for deciding which claims qualify for payment under the benefit plan and which ones don't. Having the client's billing engine to make the payment determinations gives the employer full access to our experience and resources, ensures the privacy of employee health information, and protects the employer and employees by providing a totally objective claim evaluation process.

### Responsibilities:

- Onsite Application Lead in implementing business requirements and deliver to client IT stake holders.
- Regular onshore and offshore connect to deliver strategic project value.
- Engage client meetings and handle action items in coordination with the team.
- Tier 2 support for client production issues and provide work around to keep business as usual.
- Data fixes and corrections on data related issues and analyze root cause for the same.
- Application testing on new functionality changes.
- Support Major & Minor release cycles for Application IT checkout.

## EDUCATION

- 
- Bachelor of Engineering | Computer Science | TCE

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## TRAINING AND CERTIFICATIONS

- 
- Salesforce Certified Administrator
  - Salesforce Lightning Basics
  - ITIL Foundation
  - Oracle certified expert in Siebel CRM 8 Business Analyst



# Alla Naga Sravya

DATA CONVERSION LEAD

## SUMMARY

Sravya is a Talend resource and functional consultant with 5 years of experience on Data Integration platform and overall IT and A&C experience. She has led multiple data integration engagements successfully. She has solid experience from Inception to delivery of Data Integration projects using Talend. She has vast experience in Designing and Implementing Talend based Enterprise Transformation Programs, leading all phases of the project. She is a Talend Certified in Talend Open Studio and Enterprise for Data Integration. She has completed her graduation from KL University, Vijayawada with a bachelor's degree in Electronics and Computers Engineering.

## RELEVANT EXPERIENCE

GET IT DONE

DATA CONVERSION LEAD

### Scope:

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

### Responsibilities:

- Understanding existing business model and customer requirements and performing Data migration from legacy system to Sales Force.
- Working on various documents like Source Map, Source to Target, LLD, Unit Test docs according to the project.
- Working closely with Architects to build the ETL Platform using Talend Technology.

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DATA CONVERSION LEAD

### Scope:

Deloitte partnered with the client to revamp their IT landscape with this transformation engagement About 700 legacy applications were retired and replaced with the state-of-the-art cloud enterprise applications to enable the client conduct business at a superior pace and achieve their exponential growth goals for 2020 and years to come.

### Responsibilities:

- Understanding the Detailed Design Requirements
- Creating ETL jobs using Talend tool to load and process data as per requirement.
- Preparing Unit Test Cases for the ETL jobs created on Talend Tool.
- Executing the Unit Test Cases and analyzing the results.
- Created the reusable jobs by using job lets.

- Retrieve the Data from Source Systems and Load it into Target System.
- Applied Various Validation Logics (Lookup's) and Expressions.
- Provide a Permanent fix within the time period and drop the code for testing.
- Prepare the Deployments Instructions like release notes to deploy the code in SIT and Production for the incidents.

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GLOBAL ENTERPRISE IT CO.

TALEND DATA INTEGRATION CONSULTANT

**Scope:**

Deloitte partnered with the client to revamp their IT landscape with this transformation engagement About 700 legacy applications were retired and replaced with the state-of-the-art cloud enterprise applications to enable the client conduct business at a superior pace and achieve their exponential growth goals for 2020 and years to come.

**Responsibilities:**

- Worked on Identifying and Performance Tuning by implementing optimizations of transformations like look-up, Aggregator, Filter, Expression and Partitioning
- Analysis of Logical and Physical designs to derive Detailed Design.
- Participated in walkthrough and defect report meetings periodically.
- Administering the business users in the portal based on the requirements.
- Participated in Enhancements meeting to distinguish between bugs and enhancements.
- Coordinate with the Onsite team in regular meetings and with the client during the review meetings and address the issues.
- Provide the up-to-date status on the project to the Onsite team.
- Performance Tuning of the application for supporting 2x, 3x and 4x expected production volume.

**EDUCATION**

- 
- Bachelor of Engineering | Electronics and Computers | KLU

**TRAINING AND CERTIFICATIONS**

- 
- Talend Open Studio for Data Integration 5.4
  - Talend Enterprise for Data Integration 6.1



# Manish Wasan

USI PROJECT MANAGER

## SUMMARY

Manish is Project Manager in Deloitte Digital focused on delivering complex engagements for clients in the role of Project manager. He has around 14 years of CRM, Digital application and Integration Implementation experience working on numerous Digital engagements covering various domains ranging from Government & Public sector, Professional Service and Commercial Industries. He has experience in Salesforce implementations in Sales, Service, Marketing, Customer Interaction Center, Custom applications, Integration Middleware, and E-Commerce among others. He is a Salesforce Certified Administrator, Certified Developer, Sales Cloud and Service Cloud Consultant. He has completed his graduation from Amravati University with a bachelor's degree in Engineering.

## RELEVANT EXPERIENCE

GET IT DONE

USI PROJECT MANAGER

### Scope:

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

### Responsibilities:

- Offshore Manager responsible to plan, manage, lead offshore project delivery activities
- Provide technical leadership and review work delivered from offshore. Work closely with project technical architects and provide expert advice to solution architecture
- Quality management – Work with offshore quality consultant and meet project quality expectations
- Ensure that deliverables meet project plan, timeline and support weekly status reporting
- Leading Salesforce offshore application and testing team to make sure all the applications are delivered on time with quality standards
- Define System test strategy and Integration test strategy
- Managing deployment and cutover activities

GLOBAL NON-PROFIT CHILD  
SPONSORSHIP AND HUMANITARIAN  
AID ORG.

USI PROJECT MANAGER

### Scope:

Deloitte partnered with the client to revamp their IT landscape with this transformation engagement About 700 legacy applications were retired and replaced with the state-of-the-art cloud enterprise applications to enable the client conduct business at a superior pace and achieve their exponential growth goals for 2020 and years to come.

### Responsibilities:



- Leading Salesforce offshore application team to make sure all the applications are delivered on time with quality standards
- Coordinating with on-site functional team to refine requirements and change requests
- Managing time-lines and delivery dates of developments, deployments and cut-over activities
- Leading Salesforce offshore data team to make sure all the data loads programs are delivered on time with quality standards, and loads are performed with optimum performance level
- Managing defects analysis and supporting integration test cycles
- Managing deployment and cutover activities

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DEPT. OF SERVICES FOR CHILDREN, YOUTH, AND THEIR FAMILIES      USI PROJECT MANAGER

**Scope:**

Implementing Salesforce platform custom applications to support a range of services for children who have experienced abandonment, abuse, adjudication, mental illness, neglect, or substance abuse. This project was implemented using agile methodology.

**Responsibilities:**

- Offshore Manager responsible to plan, manage, lead offshore project delivery activities
- Provide technical leadership and review work delivered from offshore. Work closely with project architects and provide expert advice to solution architecture
- Quality management – Work with offshore quality consultant and meet project quality expectations
- Ensure that deliverables meet project plan, timeline and support weekly status reporting
- Leading Salesforce offshore application and testing team to make sure all the applications are delivered on time with quality standards

## EDUCATION

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- Bachelor of Engineering | Mechanical

## TRAINING AND CERTIFICATIONS

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- Salesforce Certified Administrator
- Salesforce Certified Sales Cloud Consultant
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified Platform Developer I
- Agile Scrum Master



# Venkat Jinka

SALESFORCE SENIOR DEVELOPER

## SUMMARY

Venkat is a Salesforce developer with 5 years of experience on the Salesforce platform and overall IT and CRM experience. He has vast experience in Implementing Cloud based Enterprise Transformation Programs. He is a Salesforce Certified Administrator, App Builder, PD1, PD2, Sales, and Service cloud consultant. He has completed his graduation from VNR Vignana Jyothi Institute of Engineering and Technology, Hyderabad with a bachelor's degree in Computer Science Engineering.

## RELEVANT EXPERIENCE

GET IT DONE

SALESFORCE SENIOR DEVELOPER

### Scope:

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

### Responsibilities:

- Worked as a developer, primarily on,
  - Public Facing Website and intake forms.
  - Case Management, Location Based Routing, Referrals
  - Work Order Management
  - Code Enforcement, Document Generation
  - Appointment scheduling for passport and Hazardous Material Disposal.
- Worked on below integrations:
  - GIS Maps, GIS Data, Google maps, Smarty Streets API
  - SAP Work order and case management
  - NOAA

AN INVESTMENT BANKING COMPANY

SALESFORCE SENIOR DEVELOPER

### Scope:

The goal of the project is to provide a mobile-ready set of features to stream-line access to the information and controls needed to quickly service existing and potential customers in the field. To this end, the Salesforce1 application is utilized to render custom and standard Salesforce components for use in an iPad. Develop a customized home page with different components, wave analytics.

### Responsibilities:

- Primarily responsible for developing VisualForce components and pages using SLDS.
- Converting existing VisualForce pages to be mobile ready.
- Providing design level suggestions.
- Involved in deployment, preparing ANT packages.



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## MANAGED PACKAGE

## SALESFORCE SENIOR DEVELOPER

### **Scope:**

The primary focus of this package is to provide Frameworks/ Components that can be consumed by various solutions.

### **Responsibilities:**

- Primarily involved in various development activities.
- Providing technical guidance to the team in the build and solution.
- Creation and maintenance of the managed package.

## EDUCATION

- 
- Bachelor of Engineering | Computer Science Engineering | VNR VJJET

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## TRAINING AND CERTIFICATIONS

- 
- Salesforce Certified Administrator
  - Salesforce Certified Sales Cloud Consultant
  - Salesforce Certified Service Cloud Consultant
  - Salesforce Certified Community Cloud Consultant
  - Salesforce Certified Platform App Builder
  - Salesforce Certified Platform Developer I
  - Salesforce Certified Platform Developer II



# Surbhi Sharma

CONSULTANT

## SUMMARY

Surbhi is a Salesforce Technical and functional consultant with 4 years of experience on the Salesforce platform. She has led multiple cloud transformation engagements, successfully deploying Salesforce cloud-based CRM solutions for clients across Public Sector industries. She has vast experience in Designing and Implementing Cloud based Enterprise Transformation Programs, leading all phases of the project from Blueprinting to Deployment. She is a Salesforce App Builder and Platform I Consultant. She has completed her graduation from Uttar Pradesh Technical University with a bachelor's degree in Electronics and Instrumentation Engineering.

## RELEVANT EXPERIENCE

### GET IT DONE

### SALESFORCE CONSULTANT

#### Scope:

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

#### Responsibilities:

- Analyze requirements and Design efficient Technology solutions for the business problem.
- Fix defects and support the Get It Done application.
- Expand current application for different departments.
- Apex classes, Triggers and Workflows to support CR's and Enhancements.
- Develop VF pages, controllers and custom page elements.
- Customize community portal as per the business requirements.
- Manage and Deliver Off cycle and Monthly release.
- Design, Develop, Deploy and Maintain:
  - Public Facing Website and intake forms.
  - Case Management, Location Based Routing, Referrals
  - Work Order Management
  - Code Enforcement, Document Generation
    - Worked with Integration team to develop and support integrations with:
      - GIS Map, Google maps, Smarty Streets API
      - SAP Work order and case management
      - Accela, Twilio, AWS

### TRANSPORTATION COMPANY

### SENIOR SALESFORCE DEVELOPER

#### Scope:



Client is a transportation company which uses Salesforce Community for interaction with end customers. They use billing application (Quickbooks). This solution removed lengthy manual processing of quotations and bill generation. This application included bidirectional integration between Salesforce and Quickbooks. This include Google APIs for distance calculation and auto generation of quotes.

**Responsibilities:**

- Analyze requirements and configured Customer Community for customer interaction.
- Bi-directional API integration between Salesforce and multiple instance of Quickbooks.
- Developing VF pages, Controllers and custom page elements for quotations.
- Customized Echo-sign managed package for e-signing documents.
- Design, Develop, Deploy and Maintain:
  - Public Facing Website and intake forms.
  - Lead and opportunity Management, Location Based Quote Generation
    - Develop Batch classes, triggers, managed packages, webhooks.

## EDUCATION

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- Bachelor of Technology | Electronics and Instrumentation | UPTU

## TRAINING AND CERTIFICATIONS

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- Salesforce Certified Platform App Builder
- Salesforce Certified Platform Developer I



# Ajit Kumar

CONSULTANT

## SUMMARY

Ajit is a Salesforce developer and consultant with 4+ years of experience on the Salesforce platform. He has worked on multiple projects on the Public Sector. He is a Salesforce Certified Administrator, App Builder. He has completed his graduation from Uttarakhand Technical University with a bachelor's degree in Computer Science Engineering.

## RELEVANT EXPERIENCE

### GET IT DONE

### DEVELOPER

**Scope:**

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service requests from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

**Responsibilities:**

- Developing pages, apex class, batch class, trigger, and configurations.
- Worked on AWS integration.
- Worked on Google Map integration.
- Involved in design discussions.
- Worked on Container payment.
- Provided support after project Go Live.

### LEADING PROVIDER OF NATURAL GAS, ELECTRICITY, AND GREEN ENERGY PRODUCTS

### DEVELOPER

**Scope:**

Client is a leading provider of natural gas, electricity and green energy products. Established in 1997 and as a publicly traded company, serving nearly 2 million customers across North America. Client has partnered with top companies in the solar industry to ensure provide a best-in-class customer care and a quality solar energy system.

**Responsibilities:**

- Developing pages, apex class, batch class, trigger, and configurations.
- Worked on REST integration with CPF tool.
- Worked on Salesforce Lightning.

## EDUCATION

- Bachelor of Engineering | Computer Science | UTU



## TRAINING AND CERTIFICATIONS

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- Salesforce Certified Administrator
- Salesforce Certified Platform App Builder
- Salesforce Certified Platform Developer I



# Pavani Mandavalli

CONSULTANT

## SUMMARY

Pavani is a Salesforce developer and consultant with 3+ years of experience on the Salesforce platform. She has worked on multiple projects on Public Sector. She is a Salesforce Certified App Builder, Certified Developer. She has completed her graduation from Andhra University with a bachelor's degree in Electrical and Electronics Engineering.

## RELEVANT EXPERIENCE

GET IT DONE

DEVELOPER

### Scope:

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

### Responsibilities:

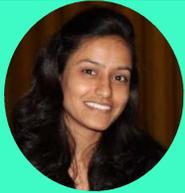
- Developing pages, apex class, batch class, trigger.
- Worked on google map integration, GIS sync Interface.
- Involved in design discussion.
- Worked in Data Conversion Activities (Talend Tool)
- Fixing defects and supporting Application
- Worked in enhancing and expansion of current application

## EDUCATION

- Bachelor of Engineering | Electrical and Electronics | AU

## TRAINING AND CERTIFICATIONS

- Salesforce Certified Platform App Builder
- Salesforce Certified Platform Developer I



# Apurva Satyendranath Sharma

ASSOCIATE ANALYST

## SUMMARY

Apurva is a Salesforce developer and Associate Analyst with 2+ years of experience on the Salesforce platform. She has worked on multiple project on Public Sector. She is a Salesforce Certified Platform Developer. She has completed her graduation from Fergusson College, Pune with a bachelor's degree in Computer Science.

## RELEVANT EXPERIENCE

GET IT DONE

DEVELOPER

### Scope:

Deloitte partnered with the City of San Diego to build and support the Get It Done Expansion program. This solution replaced 5 aging legacy systems and enabled 9 key City departments to work cohesively in a single application to manage and process service request from residents. The application included a Self-Service Web Portal, Case Referral process, Work Order Management, Code Enforcement, Document Generation, Inventory Management integration, GIS Integration, Passport Appointment Scheduling and Address validation.

### Responsibilities:

- Developing pages, apex class, batch class, trigger.
- Worked on google map integration.
- Involved in design discussion.
- Worked on Basic Gov Letter Engine.
- Fixing defects and supporting the application.
- Enhancing and expanding the current functionality to different departments.

## EDUCATION

- Bachelor of Science | Computer Science | Maharashtra

## TRAINING AND CERTIFICATIONS

- Salesforce Certified Platform Developer I

# References (J)

## Selected References

Mayor Faulconer, this morning, I reported through the city website that the recycle bins on our little street had not been emptied on Monday as scheduled. First, the report was easy to file; second, it was immediately acknowledged; third, the bins had been emptied within two hours and a report sent to me advising that the case was closed.

I would like to commend all involved. The designer of the system, the operators of the system and those who came to empty the bins all did an outstanding job."

**Real Constituent Feedback  
Get It Done, City of San Diego**

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### Reference #1



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**Client Name:** City of San Diego

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**Client Contact:** Alex Hempton, Performance and Analytics  
Phone: (619) 384-4468, Email: ahempton@sandiego.gov

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**Client Size and Industry:** ~1.5M in population, Local Government

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**Description of Project and Services Provided:**

**Project Summary**

For the Implementation work, the City of San Diego engaged with Deloitte Consulting to lead their 311/Get It Done CRM implementation and expansion project, with the goal to better connect the City's departments with San Diego residents. The project dramatically expands on the basic issue reporting functionality launched as part of the City's "Get It Done" pilot project by incorporating multiple new departments, issue types, and capabilities like appointment scheduling and code enforcement. The project includes working with the following City departments:

- Environmental Services (ESD)
  - Transportation and Storm Water (TSW)
  - Development Services (DSD)
  - Public Utilities (PUD)
-

- 
- Public Works
  - Police
  - Homeland Security
  - City Clerk
  - Communications
  - Performance and Analytics
  - Parks and Recreation
  - Department of IT

For the O&M work, the City of San Diego continued to engage Deloitte Consulting as their preferred vendor in supporting and maintaining the “Get It Done” platform. This includes but is not limited to supporting Incidents and Minor enhancements for all the departments mentioned above.

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### Goals and Objectives

- Empower City of San Diego residents with an easy-to-use set of digital tools for reporting common issues found throughout the city (e.g. pot holes, encroachment issues, homeless encampments, illegal discharges, etc.).
- Identify opportunities to standardize case management and code enforcement processes across the City’s departments.
- Enable better interdepartmental data sharing, collaboration and communications by migrating City departments to the same system.
- Develop a centralized knowledge base to educate internal and external audiences on the City processes and policies.

Establish standard reporting principles and SLAs across departments.

### Solution Architecture

Salesforce’s Government Cloud is the core of the City of San Diego’s 311 solution. Coupled with BasicGov to support code enforcement processes, the City of San Diego’s 311 system supports the following capabilities:

- Case Management
- Knowledge Management
- Code Enforcement
- User Management
- Document Generation
- Reporting

### User/User Profiles

The users of the City of San Diego’s 311 system include:

- San Diego Residents for issue reporting and knowledge base access.
- Customer Service Reps and Dispatchers for creating, triaging, and managing cases.
- Code Enforcement Officers and Supervisors for complaint-driven and proactive code enforcement processes.
- Field Operations Staff and Supervisors for processing work orders related to work being done in the field (e.g. graffiti clean-up, illegal dumping clean-up, homeless camp abatement, etc.).
- General Department Staff and Management to support day to day operations of some departments.

### Integration

To fully enable the City of San Diego’s 311 solution, several integrations to existing City systems were required. These systems include:

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- ESRI (ArcGIS) – Most of the City's departments use ESRI/ArcGIS for their mapping needs. This integration was needed for determining jurisdiction and ownership, as well as identifying damaged City assets.
- Accela – The Development Services Department implemented Accela as their code enforcement and permitting application. This integration was needed to support the intake of DSD-related enforcement-related complaints from the Get It Done app and website.
- SAP Enterprise Asset Management – The Transportation and Storm Water and Public Utilities Departments implemented SAP EAM to manage and maintain all of the City's assets. This integration was needed to support the intake of problems related to those City assets and to track the work being done to fix the asset.
- ConnectedBits – ConnectedBits is the iOS and Android app used by residents to report issues to the City. ConnectedBits is integrated with the backend Salesforce application for case intake and tracking.
- AWS – The City uses Amazon S3 as their main content management system. This integration was needed to archive photos and different types of documents.
- Google Maps – Public facing pages and some internal salesforce screens uses google maps for capturing the problem reported location.
- Twilio – A text-based service used for appointment reminders.
- Basicgov – Letter generation components within Salesforce.
- Okta SSO – Enterprise Single Sign on used within City.
- Payment Gateway – Online payment feature and Payment services.

**Business Benefits Realized**

Since the 311 Get It Done project was implemented, several benefits have been realized:

- Staff members across 8 departments are able to instantly communicate regarding complex service requests, a process that was formally only accomplished via individual phone calls and emails.
- Department Directors have access to reports and dashboards that provide them with insights into their departments' productivity, down to the individual level. This has allowed them to begin better allocating resources to issues across the City of San Diego
- Field Operations staff and Inspectors are now able to complete their cases, work orders, and inspections from the field. A capability that saves these employees time by eliminating the need to go back to the office to provide management with updates.
- City CSR processes have been streamlined through location based automated service request routing. Eliminating the need to manually look up supervisors and staff members for service request assignments.

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**Date Implemented:** August 27, 2018

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**Contract Term:** Implementation: November 2017 – September 2018  
 O&M: September 2018 – August 2020

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**Total Dollar Value of the Contract:** Implementation: \$2.55M  
 O&M: \$1M

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**Table 12. Client Reference 1 - San Diego**

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**Reference #2**



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**Client Name:** County of Orange

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**Client Contact:** Joel Golub, Chief Information Officer  
Phone: (714) 834-6827, Email: [joel.golub@ocit.ocgov.com](mailto:joel.golub@ocit.ocgov.com)

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**Client Size and Industry:** ~3.2M in population, City Government

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**Description of Project and Services Provided:**

**Project Summary**

Deloitte launched myOC eServices, a cloud-based Salesforce platform. The solution transformed the way in which the County engages with its constituents and businesses. The citizen portal allows businesses and citizens to apply for a variety of services online which includes applying for permits, registering business licenses, requesting inspections, submitting service requests and paying online for requested services. The platform also integrates with GIS, Bluebeam as well as the County's accounting, employee time tracking and work order management systems.

**Goals and Objectives**

- Orange County Public Works wanted to transform the way it provided services to and interacted with constituents and its large developer community.
- Modernize the citizen's ability to enter and search service requests.
- Streamline the process to apply for services which includes permits, business licenses, planning application and map services from the County.
- Access a County knowledge base for information.

**Solution Architecture**

- The solution is built on the cloud-based Salesforce platform, and uses the BasicGov Licensing and Permitting solution, while integrating with a number of external services for GIS (ESRI), payment gateway (Cybersource), digital plan reviews (Bluebeam), Work Order Management (Maintstar), Citations (DataTicket) as well as integrations with the County's Accounting and Payroll systems.
- The back-end system was integrated to OCPW's legacy work order management system Mainstar so that maintenance service request for issues such as street, fence and flood channel issues could be managed through their existing systems
- Status updates from Maintstar are routed back to the CRM platform and are available to the public either through a status check of the specific incident or generally through the incident research mapping functions.

**User Profiles**

- OCPW Permitting and Land Development and OC Survey groups utilizes the Land Management System to manage the entire lifecycle of permits and applications from submission to issuance, which includes payment of fees and submission of code enforcement cases.
  - OC Agricultural Commission group uses the solution to process and renew business licenses for constituents.
  - OCPM Maintenance group utilizes their integrated Mainstar work order management system to conduct their day to day work
  - Environmental Resources group manages their service requests directly in the Salesforce CRM solution.
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**Integration**

- County's ESRI GIS system providing for highly interactive mapping functions.
- The solution integrates with Bluebeam markup tool for processing digital plans and submittals.
- External systems for citation processing, employee time tracking, and accounting and payroll processing.

**Business Benefits Realized**

- The first phase of the CRM solution was implemented in 24 weeks from contract to go-live.
- Since go-live, OCPW has been able to improve their operations and incident resolution times due to improved information and management reporting, specifically:
  - Average service resolution time decreased to 4 days, down from an average of 15-20 days
  - Average on-time completion rate is now 72%, up from 57%
- This solution allowed the County to perform quantitative analysis to support executive-level decisions regarding key partnerships, resource allocation, and organizational structure to efficiently deliver high-quality customer service.
- Visualization capabilities allowed managers to identify bottlenecks and organize resources to address areas of high activity, enabling data-based decisions.
- The second phase of the project rolled out additional capabilities to launch the ability to submit and process applications for permitting, land use and surveyor services, ability to register businesses licenses, ability to request and schedule inspections, submit complaints as well as pay for these services online.
- Constituents can now use the mobile or Web app to apply for services, respond to information requests from the county and check the status of their applications.

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**Date Implemented:**

- April 2017 (CRM), Jan 2019 (LMS)

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**Contract Term:** October 2016 – Ongoing (Phase 1 CRM – Phase 2 Land Management System)

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**Total Dollar Value of the Contract:** \$4M

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**Table 13 – Client Reference 2**

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**Reference #3**



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**Client Name:** Colorado Governor's Office of Information Technology (OIT)

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**Client Contact:** Rhonda Paxson, Application Director, Deputy Director CBMS/PEAK  
Phone: (303)-764-8352

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**Client Size and Industry:** 5,000 Workers, 1.7 Million Active Clients, State Government

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**Description of Project and Services Provided:**

**Project Summary**

The Colorado Benefits Management System (CBMS) and its client facing partner the Program Eligibility & Application Kit (PEAK) provide Coloradans with swift access to a variety of government benefits and services. CBMS is used by nearly 5,000 workers to issue and manage benefits for over 1.7 Million Coloradans. To meet the State of Colorado's goals, Deloitte was engaged to convert the Office of Information Technologies' legacy, Java-based Web-portal to a Cloud-based solution leveraging Salesforce. Workers benefit from a redesigned user interface built on the modern platform and Clients benefit from the increased availability and resources of a cloud-based solution. While CBMS was migrated to the Salesforce cloud in 2019, PEAK has leveraged the Salesforce platform since its go-live in XXXX. The solution now supports 25 programs across the state, and numerous improvements in self-service and caseworker functionality have been realized.

**Goals and Objectives**

- Expedite the eligibility determination and benefit issuance process
- Establish an Agile process for subsequent UI-heavy enhancement projects
- Improve the customer adoption process by managing and triaging user help desk tickets
- Flexibility and extensibility with Salesforce platform
- Manage core functions such as project management, business analysis, data management, release management, agile coaching, governance, UX design, and testing
- Consistent and positive user feedback

**Solution Architecture**

- Salesforce Lightning Web Portal
- Corticon Rules Engine and Oracle Database hosted on AWS
- Mulesoft ESB for internal and external integrations
- Mobile Application for citizens and business stakeholders
- An Agile Scrum approach was used to immediately provide business results

**Users/User Profiles**

- Citizens of the State of Colorado
- Employees in the Office of Information Technologies working on the Colorado Benefits Management System (CBMS) and Program Eligibility & Application Kit (PEAK)

**Integrations**

Integration with Jenkins and the Apache Ant plugin to deploy scripts to production.

**Business Benefits Realized**

Colorado was the first state to adopt Deloitte's cloud-based online platform to help better meet the self-service needs of its citizens. The Program Eligibility Application Kit (PEAK) allowed 180,000 Coloradans gain medical care that was previously unavailable to them, and this solution

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became the foundation of the CitizenCONNECT platform used today. Some additional highlights of the benefits relevant to the State of Colorado are listed below:

- Stable end user performance
- Increased quality of software releases that are far above industry standards
- On-time quarterly releases for system enhancements
- A more user-friendly experience by leveraging industry-standard UX 2014 design principles
- Daily maintenance activity, including Web service status checks, file storage and data usage limit monitoring, and an exception log and exception report analysis

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**Date Implemented:** June 2013, August 2019

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**Contract Term:** December 2008 - Ongoing

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**Total Dollar Value of the Contract:** \$125 Million

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**Table 14. Client Reference 3.**

## **Technical Representative (K)**

Deloitte acknowledges the Technical Representative will be identified in the notice of award and will be responsible for overseeing and monitoring this Contract.

## **Other RFPs/Contracts (L)**

Deloitte acknowledges the City may release other RFPs for Application, Development, Maintenance, and Support Services and its right to “roll up” and combine like services.

## **Payment Card Industry Data Security Documents (M)**

### **Contractor Certification**

Deloitte does not believe this to be applicable given the only payment-related process of the current Get It Done solution is managed through an independent PCI Compliant Payment Gateway, outside of Get It Done/Salesforce. That said, we would be happy to discuss the applicability of PCI compliance in any future project or enhancement with the City.

### **Data Security**

Deloitte does not believe this to be applicable given the only payment-related process of the current Get It Done solution is managed through an independent PCI Compliant Payment Gateway, outside of Get It Done/Salesforce. That said, we would be happy to discuss the applicability of PCI compliance in any future project or enhancement with the City.

### **Use of Data**

Deloitte does not believe this to be applicable given the only payment-related process of the current Get It Done solution is managed through an independent PCI Compliant Payment Gateway, outside of Get It Done/Salesforce. That said, we would be happy to discuss the applicability of PCI compliance in any future project or enhancement with the City.

### **Notification Requirements**

Deloitte does not believe this to be applicable given the only payment-related process of the current Get It Done solution is managed through an independent PCI Compliant Payment Gateway, outside of Get It Done/Salesforce. That said, we would be happy to discuss the applicability of PCI compliance in any future project or enhancement with the City.

## **Indemnity**

Deloitte does not believe this to be applicable given the only payment-related process of the current Get It Done solution is managed through an independent PCI Compliant Payment Gateway, outside of Get It Done/Salesforce. That said, we would be happy to discuss the applicability of PCI compliance in any future project or enhancement with the City.

## **Assumptions**

Deloitte is submitting an all-inclusive fixed fee bid for the implementation services described in this response.

## **Assumptions**

The pricing, timing, and other terms of this proposal and Deloitte's performance of outlined services and provision of identified Deliverables and other responsibilities of Deloitte in this proposal are dependent on the assumptions set out below being valid. Any deviation or modification of the below noted assumptions may result in additional costs and time to the City or an inability to provision the Deliverables as outlined in this proposal.

## **General**

1. Deloitte and the City will work together, to establish specific dates for activities, deliverables, and milestones, including the go-live date; additionally, items to be considered for accommodation will include statutory holidays.
2. The City Project Manager will have overall responsibility and authority for driving all Project decisions, reviewing and approving all deliverables, facilitating discussion and communication among the parties as needed, and securing any required City or third-party resources.
3. Deloitte is not responsible for delays or additional scope that results from other initiatives the City may have in progress.
4. Program and Project Management will be a shared responsibility between the City and Deloitte.
5. A standard work week of 45 hours is assumed for all full-time Deloitte resources. A standard 40 hours work week is assumed for all full-time City resources.
6. The approach to design and implementation is highly concentrated and heavily dependent upon focus group work sessions with user representatives to finalize business and technical requirements. The work plan is based on qualified user representatives attending the sessions and having the authority necessary to direct Deloitte's professionals and make timely final decisions regarding the system's functionality in accordance and/or in manner that permits the planned work and schedule to be achieved.
7. Deloitte intends to complete some work onshore (offsite) and offshore. In the event offshore or offsite work is subsequently prohibited such that Deloitte cannot continue with its planned use of

offshore or offsite resources, such event shall be a change and result in an equitable adjustment to price and schedule.

8. Any City requested change to the solution or system configuration/functionality that deviates from the approved design will be subjected to the change control process to analyze the impact to deliverables in progress.
9. As Salesforce is a third-party SaaS platform, all infrastructure related issues are not the responsibility of Deloitte but will be addressed between the City and vendor, however wherever possible, Deloitte will provide guidance and facilitate discussions and resolution where appropriate.
10. Deloitte will have no responsibility for the performance of other contractors or vendors engaged by the City, or delays caused by them, in connection with the Project.
11. Deloitte and the City will finalize the sprint schedule, inclusive of meetings, draft Deliverable target dates, review cycles and sign-off milestones in advance of beginning any sprint. Together, the City and Deloitte will identify the City stakeholders for each sprint and define the acceptance criteria and review cycle time in advance of beginning any sprint.
12. The timeline and team size was estimated based on the requirements described in the RFP. Request for additional integrations or work products could impact the timeline and resources required.
13. If requirements exceed weekly baseline capacity, a change order will be needed to meet the capacity required.

## **City Staff**

14. The city will provide qualified and knowledgeable members to the Project Team at the staffing levels and according to the timeline, with the business and technical skills required as defined by the Project roles.
15. The city will confirm subject matter specialists and super users are available when needed to attend meetings and workshops, a lack of availability resulting in additional sessions being required will result in a change order and could have timeline and cost implications.
16. Deloitte team members will have appropriate access to the City's executives, Project leadership, managers, and employees.
17. The city is responsible for determining and communicating the business value for the purpose of setting priorities associated with each of the sub processes and/or requirements in the scope of the Project to address the highest valued features earliest in the sprint cycles.
18. The City is responsible for delays or additional costs associated with the unavailability of required City resources and for ensuring performance of its third parties.

## **Timing**

19. The "Steering Committee" defined as the City executive program sponsors and the Project Management Office (PMO) will make all decisions in a fashion and manner consistent with Project timelines and Deliverables contained herein or as mutually modified. The Steering Committee will empower the City Project Manager and his/her direct reports to make as many Project decisions as possible, reserving only items of a strategic nature for the Steering Committee.
20. The City is fully aware of the dependencies and need for timely decisions in support of this project and as such, the City will take every reasonable step to ensure decisions are properly escalated for response and resolution in a manner consistent with the project timeline needs.

## **Deloitte Personnel**

21. Deloitte staff typically perform the Services on-site Monday through Thursday and work remotely on Friday. Deloitte's offshore team members will perform work remotely.
22. We proposed each of our key staff based on their anticipated availability given your anticipated project start and schedule. Should we have a key staff member whose availability changes, we will propose and work with the City to find a suitable replacement.

## **Data**

23. The City will be responsible for all data conversion and related activities such as data cleansing, mapping, extract creation, and import.

## **Licensing**

24. The City will be responsible for the procurement of relevant licenses for all users and the infrastructure components required for the execution of integrations.
25. The City will acquire and provide all software and hardware required for project delivery in accordance with the Project Schedule. Any delays in the procurement of hardware or software may cause delays in project delivery or impact project scope
26. All licenses and products will be procured on time by the city to start project design and build activities within the defined timeline.

## **Solution**

27. The City is responsible to provide the development environments necessary for all threads at the project start date; if there are delays in getting access to the development environment from Salesforce, the start date will be adjusted accordingly.
28. The City team members will work with Deloitte to write and review user story specifications and acceptance criteria.

29. If the City desires a Salesforce expert services review, the City will contract separately with Salesforce for the expert services review. Deloitte will support the expert services review by working with Salesforce.
30. The Salesforce application incorporates a number of accessibility features seeking to meet the requirements outlined in the Web Content Accessibility Guidelines (WCAG) 2.0 at Level A. Any additional effort related to accessibility or ADA compliance that is not documented is not considered in scope for the estimates provided.
31. The proposed enterprise solution and public facing solution will support US – English Locale and English language only. The estimates provided do not include any other language translations.
32. The necessary lifecycle environments will be made available, throughout the proposed project schedule, for impacted legacy and boundary systems.
33. For integrations in scope, it is assumed that the City will provide required resources and support for legacy and/or external system work.
34. The solution is a browser-based solution and we will work with the City for single-sign-on requirements. The City will own active directory configuration and maintenance.
35. Deloitte project team will conduct Knowledge Transfer sessions to transfer the know how necessary for technical maintenance of the solution to the City or a City designated contractor prior to go-live.
36. The City or the City's designated contractor will own the operational maintenance of the solution post hyper-care.
37. ALL solutions will be in English only, no additional languages have been included in this scope of work.
38. Data migration is not included in this scope of work. The City or a City designated contractor will be responsible for migrating any required data from legacy system to the new solution.
39. Deloitte's process for review and acceptance of User Experience Design assumes a maximum of two rounds of reviews.
40. The City will be accountable for timely responses and decisions required to complete design and build activities with the defined timeline. Delay in city approvals, city design decisions, and customization sign-off will impact timeline.
41. The City will provide a style guide including font, logo, web standards, and branding during the Analyze Phase to be followed during the Design and Build Phase.
42. The Design and Build phase includes four 3-week sprints. Additional requirements or design changes introduced by the City during each sprint could impact timeline and scope. Configuration and design of the Salesforce application must be completed before integration test cycle 1.
43. Any target system application design changes that affect data model which are part of Integrations will impact timeline.

## **Change Management and Training**

44. The City will provide subject matter specialists, super users, and trainers as required to complete courseware reviews, identify specific exercise scenarios, support data identification, and prepare the training system.
45. The City will deliver the end-user training and will provide timely identification and onboarding of resources who will serve as trainers.
46. The City will administer all training logistics and related compliance activities, inclusive of enrollment/registration, attendance tracking, and reporting.
47. All end-user training sessions will be conducted using a “train the trainer” approach.
48. The City will reproduce and distribute communication materials and courseware components.
49. The City will provide all necessary training facilities and equipment, including training rooms, hardware, network access, audio-visual equipment, and classroom supplies in accordance with the Project timeline and milestones.
50. All training materials will be delivered in English-only.
51. The City will provide a central repository to store all training materials that can be accessed remotely by all impacted end users.

## **Technology/Infrastructure**

52. The City is responsible for providing facilities for the Project Team, including sufficient work space, system and network access, and phone access.
53. The City will provide the system infrastructure (i.e., software, hardware, licenses and network) at an appropriate capacity level to support nonproduction and production environments. System infrastructure will be sized to support the Project Team and business operations to minimize any downtime and performance issues, according to applicable timelines and milestones.
54. The City will lead and manage resources associated with legacy system design and development. This includes resources involved in legacy system modifications and building legacy integrations to the solution.
55. The City will allow remote connections into the Systems and applications if any such as SharePoint, Google Drive etc. for Deloitte personnel, including those working off site, as required to meet Project requirements.
56. The City will provide adequate technical resources to define, design, build, test, and deploy integrations with legacy applications or applications owned by the city within the defined project timeline. This includes third-party vendors contracted by the city to support existing applications.
57. The City will provide required capabilities for any third party/bolt-on applications not included in the scope of the Services.



## **Testing**

1. User Acceptance Test feedback which is cosmetic (related to the text or visual design) will be documented as a change request and will not block UAT phase closure.
2. The City resources will participate in System Integration Testing and User Acceptance Testing (UAT).
3. The City will manage and execute with assistance from Deloitte the User Acceptance Testing Phase and validate that UAT coverage is sufficiently tested, including test script creation, test script execution, assigning user logons, passwords, and maintaining user profiles within the UAT environment.
4. Testing of the Self-Service portal will be performed on an agreed upon set of browsers (including mobile browsers). Devices for testing will be provided by the City. Testing parameters (browsers, versions, operating systems, devices) will be identified in the Test Approach Document.
5. ADA testing using specialized ADA testing tools will be supported by the City.

**City of San Diego**  
**CONTRACTOR STANDARDS**  
**Pledge of Compliance**

The City of San Diego has adopted a Contractor Standards Ordinance (CSO) codified in section 22.3004 of the San Diego Municipal Code (SDMC). The City of San Diego uses the criteria set forth in the CSO to determine whether a contractor (bidder or proposer) has the capacity to fully perform the contract requirements and the business integrity to justify the award of public funds. This completed Pledge of Compliance signed under penalty of perjury must be submitted with each bid and proposal. If an informal solicitation process is used, the bidder must submit this completed Pledge of Compliance to the City prior to execution of the contract. All responses must be typewritten or printed in ink. If an explanation is requested or additional space is required, Contractors must provide responses on Attachment A to the Pledge of Compliance and sign each page. Failure to submit a signed and completed Pledge of Compliance may render a bid or proposal non-responsive. In the case of an informal solicitation or cooperative procurement, the contract will not be awarded unless a signed and completed Pledge of Compliance is submitted. A submitted Pledge of Compliance is a public record and information contained within will be available for public review except to the extent that such information is exempt from disclosure pursuant to applicable law.

By signing and submitting this form, the contractor is certifying, to the best of their knowledge, that the contractor and any of its Principals have not within a five (5) year period – preceding this offer, been convicted of or had a civil judgement rendered against them for commission of a fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State or local) contract or subcontract.

“Principal” means an officer, director, owner, partner or a person having primary management or supervisory responsibilities within the firm. The Contractor shall provide immediate written notice to the Procurement Contracting Officer handling the solicitation, at any time prior to award should they learn that this Representations and Certifications was inaccurate or incomplete.

**This form contains 10 pages, additional information may be submitted as part of *Attachment A*.**

**A. BID/PROPOSAL/SOLICITATION TITLE:**

Get It Done/Salesforce Platform Application Development, Maintenance, and Support  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**B. BIDDER/PROPOSER INFORMATION:**

Deloitte Consulting LLP			
Legal Name		DBA	
655 W Broadway, Suite 700	San Deigo	CA	92101
Street Address	City	State	Zip
Thomas Beyer, Principal	(619) 232-6500		
Contact Person, Title	Phone	Fax	

Provide the name, identity, and precise nature of the interest\* of all persons who are directly or indirectly involved\*\* in this proposed transaction (SDMC § 21.0103). Use additional pages if necessary.

\* The precise nature of the interest includes:

- the percentage ownership interest in a party to the transaction,
- the percentage ownership interest in any firm, corporation, or partnership that will receive funds from the transaction,
- the value of any financial interest in the transaction,
- any contingent interest in the transaction and the value of such interest should the contingency be satisfied, and
- any philanthropic, scientific, artistic, or property interest in the transaction.

\*\* Directly or indirectly involved means pursuing the transaction by:

- communicating or negotiating with City officers or employees,
- submitting or preparing applications, bids, proposals or other documents for purposes of contracting with the City, or
- directing or supervising the actions of persons engaged in the above activity.

Thomas Beyer	Principal
Name	Title/Position
San Diego, CA	
City and State of Residence	Employer (if different than Bidder/Proposer)
No principal or managing director of Deloitte Consulting LLP has more than a 1% ownership interest. See attached Statement on Deloitte Consulting LLP Ownership and Management Structure.	
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

**C. OWNERSHIP AND NAME CHANGES:**

1. In the past five ten (5) years, has your firm changed its name?

Yes       No

If **Yes**, use Attachment A to list all prior legal and DBA names, addresses, and dates each firm name was used. Explain the specific reasons for each name change.

2. Is your firm a non-profit?

Yes       No

If **Yes**, attach proof of status to this submission.

3. In the past five (5) years, has a firm owner, partner, or officer operated a similar business?

Yes       No

If **Yes**, use Attachment A to list names and addresses of all businesses and the person who operated the business. Include information about a similar business only if an owner, partner, or officer of your firm holds or has held a similar position in another firm.

**D. BUSINESS ORGANIZATION/STRUCTURE:**

Indicate the organizational structure of your firm. Fill in only one section on this page. Use Attachment A if more space is required.

**Corporation** Date incorporated: \_\_\_\_\_ State of incorporation: \_\_\_\_\_

List corporation's current officers: President: \_\_\_\_\_  
 Vice Pres: \_\_\_\_\_  
 Secretary: \_\_\_\_\_  
 Treasurer: \_\_\_\_\_

Type of corporation: C  Subchapter S

Is the corporation authorized to do business in California:  **Yes**       **No**

If **Yes**, after what date: \_\_\_\_\_

Is your firm a publicly traded corporation?  Yes  No

If Yes, how and where is the stock traded? \_\_\_\_\_

If Yes, list the name, title and address of those who own ten percent (10 %) or more of the corporation's stocks:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do the President, Vice President, Secretary and/or Treasurer of your corporation have a third party interest or other financial interests in a business/enterprise that performs similar work, services or provides similar goods?  Yes  No

If Yes, please use Attachment A to disclose.

Please list the following: Authorized Issued Outstanding

a. Number of voting shares:	_____	_____	_____
b. Number of nonvoting shares:	_____	_____	_____
c. Number of shareholders:	_____	_____	_____
d. Value per share of common stock:		Par	\$ _____
		Book	\$ _____
		Market	\$ _____

**Limited Liability Company** Date formed: \_\_\_\_\_ State of formation: \_\_\_\_\_

List the name, title and address of members who own ten percent (10%) or more of the company:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Partnership** Date formed: 1996 State of formation: Delaware

List names of all firm partners:

Deloitte Consulting LLP is a Limited Liability Partnership with more than 2,700 principals and managing directors in the U.S. Firm.

See attached Statement on Deloitte Consulting LLP Ownership and Management Structure.

**Sole Proprietorship** Date started: \_\_\_\_\_

List all firms you have been an owner, partner or officer with during the past five (5) years. Do not include ownership of stock in a publicly traded company:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Joint Venture** Date formed: \_\_\_\_\_

List each firm in the joint venture and its percentage of ownership:

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**Note:** To be responsive, each member of a Joint Venture or Partnership must complete a separate *Contractor Standards form*.

**E. FINANCIAL RESOURCES AND RESPONSIBILITY:**

1. Is your firm preparing to be sold, in the process of being sold, or in negotiations to be sold?

**Yes**       **No**

If **Yes**, use Attachment A to explain the circumstances, including the buyer's name and principal contact information.

2. In the past five (5) years, has your firm been denied bonding?

**Yes**       **No**

If **Yes**, use Attachment A to explain specific circumstances; include bonding company name.

3. In the past five (5) years, has a bonding company made any payments to satisfy claims made against a bond issued on your firm's behalf or a firm where you were the principal?

**Yes**       **No**

If **Yes**, use Attachment A to explain specific circumstances.

4. In the past five (5) years, has any insurance carrier, for any form of insurance, refused to renew the insurance policy for your firm?

**Yes**       **No**

If **Yes**, use Attachment A to explain specific circumstances.

5. Within the last five years, has your firm filed a voluntary petition in bankruptcy, been adjudicated bankrupt, or made a general assignment for the benefit of creditors?

**Yes**       **No**

If **Yes**, use Attachment A to explain specific circumstances.

6. Are there any claims, liens or judgements that are outstanding against your firm?

**Yes**       **No** \*There are no outstanding financial claims, liens or judgments against Deloitte Consulting LLP.

If **Yes**, please use Attachment A to provide detailed information on the action.

7. Please provide the name of your principal financial institution for financial reference. By submitting a response to this Solicitation Contractor authorizes a release of credit information for verification of financial responsibility.

Name of Bank: JP Morgan Chase Bank

Point of Contact: Gina Gibson, CFA

Address: 270 Park Avenue, Floor 43, New York, NY 10017

Phone Number: (212) 622-3145

8. By submitting a response to a City solicitation, Contractor certifies that he or she has sufficient operating capital and/or financial reserves to properly fund the requirements identified in the solicitation. At City's request, Contractor will promptly provide to City

a copy of Contractor's most recent balance sheet and/or other necessary financial statements to substantiate financial ability to perform.

9. In order to do business in the City of San Diego, a current Business Tax Certificate is required. Business Tax Certificates are issued by the City Treasurer's Office. If you do not have one at the time of submission, one must be obtained prior to award.

Business Tax Certificate No.: B2011002742 Year Issued: 2019

**F. PERFORMANCE HISTORY:**

1. In the past five (5) years, has your firm been found civilly liable, either in a court of law or pursuant to the terms of a settlement agreement, for defaulting or breaching a contract with a government agency?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

2. In the past five (5) years, has a public entity terminated your firm's contract for cause prior to contract completion?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances and provide principal contact information.

3. In the past five (5) years, has your firm entered into any settlement agreement for any lawsuit that alleged contract default, breach of contract, or fraud with or against a public entity?

Yes  No \*See our response to Question F.3 in Attachment A.

If **Yes**, use Attachment A to explain specific circumstances.

4. Is your firm currently involved in any lawsuit with a government agency in which it is alleged that your firm has defaulted on a contract, breached a contract, or committed fraud?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

5. In the past five (5) years, has your firm, or any firm with which any of your firm's owners, partners, or officers is or was associated, been debarred, disqualified, removed, or otherwise prevented from bidding on or completing any government or public agency contract for any reason?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

6. In the past five (5) years, has your firm received a notice to cure or a notice of default on a contract with any public agency?

Yes  No \*See our response to Question F.6 in Attachment A.

If **Yes**, use Attachment A to explain specific circumstances and how the matter resolved.

7. Performance References:

Please provide a minimum of three (3) references familiar with work performed by your firm which was of a similar size and nature to the subject solicitation within the last five (5) years.

Please note that any references required as part of your bid/proposal submittal are in addition to those references required as part of this form.

Company Name: Commonwealth of Kentucky

Contact Name and Phone Number: Jennifer Harp / (502) 564-0105 x 2619  
Contact Email: jennifer.harp@ky.gov  
Address: 275 East Main Street, 4W-E, Frankfort, KY 40601  
Contract Date: Implementation: 7/2017-10/2018 ; Support: 1/2018-5/2019  
Contract Amount: \$15,000,000  
Requirements of Contract: Salesforce Service Cloud citizen engagement platform implementation and support

Company Name: County of Orange

Contact Name and Phone Number: Joel Golub, (714) 834-6827

Contact Email: joel.golub@ocit.ocgov.com

Address: 300 E. Chapman Ave, Orange, CA 92866

Contract Date: October 2016 - Ongoing

Contract Amount: \$4M

Requirements of Contract: Implement a cloud-based Salesforce platform

Company Name: Colorado Governor's Office of Information Technology (OIT)

Contact Name and Phone Number: Rhonda Paxson, (303) 764-8352

Contact Email: rhonda.paxson@state.co.us

Address: 639 E 18th Ave, Suite 205, Denver CO, 80203

Contract Date: December 2008 - Ongoing

Contract Amount: \$125M

Requirements of Contract: Convert legacy web-portal to cloud-based Salesforce solution

**G. COMPLIANCE:**

1. In the past five (5) years, has your firm or any firm owner, partner, officer, executive, or manager been criminally penalized or found civilly liable, either in a court of law or pursuant to the terms of a settlement agreement, for violating any federal, state, or local law in performance of a contract, including but not limited to, laws regarding health and safety, labor and employment, permitting, and licensing laws?  
 Yes       No

If **Yes**, use Attachment A to explain specific circumstances surrounding each instance. Include the name of the entity involved, the specific infraction(s) or violation(s), dates of instances, and outcome with current status.

2. In the past five (5) years, has your firm been determined to be non-responsible by a public entity?  
 Yes       No

If **Yes**, use Attachment A to explain specific circumstances of each instance. Include the name of the entity involved, the specific infraction, dates, and outcome.

**H. BUSINESS INTEGRITY:** \*Deloitte Consulting LLP would like to clarify that any representations, certifications, statements, or affirmations made and submitted in this Section H are limited to the proposed engagement team performing the services.

1. In the past five (5) years, has your firm been convicted of or found liable in a civil suit for making a false claim or material misrepresentation to a private or public entity?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances of each instance. Include the entity involved, specific violation(s), dates, outcome and current status.

2. In the past five (5) years, has your firm or any of its executives, management personnel, or owners been convicted of a crime, including misdemeanors, or been found liable in a civil suit involving the bidding, awarding, or performance of a government contract?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances of each instance; include the entity involved, specific infraction(s), dates, outcome and current status.

3. In the past five (5) years, has your firm or any of its executives, management personnel, or owners been convicted of a federal, state, or local crime of fraud, theft, or any other act of dishonesty?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances of each instance; include the entity involved, specific infraction(s), dates, outcome and current status.

4. Do any of the Principals of your firm have relatives that are either currently employed by the City or were employed by the City in the past five (5) years?

Yes  No

If **Yes**, please disclose the names of those relatives in Attachment A.

**I. BUSINESS REPRESENTATION:**

1. Are you a local business with a physical address within the County of San Diego?

Yes  No

2. Are you a certified Small and Local Business Enterprise certified by the City of San Diego?

Yes  No

Certification # \_\_\_\_\_

3. Are you certified as any of the following:

- a. Disabled Veteran Business Enterprise Certification # \_\_\_\_\_
- b. Woman or Minority Owned Business Enterprise Certification # \_\_\_\_\_
- c. Disadvantaged Business Enterprise Certification # \_\_\_\_\_

**J. WAGE COMPLIANCE:**

In the past five (5) years, has your firm been required to pay back wages or penalties for failure to comply with the federal, state or local **prevailing, minimum, or living wage laws**?  Yes  No If **Yes**, use Attachment A to explain the specific circumstances of each instance. Include the entity involved, the specific infraction(s), dates, outcome, and current status.

By signing this Pledge of Compliance, your firm is certifying to the City that you will comply with the requirements of the Equal Pay Ordinance set forth in SDMC sections 22.4801 through 22.4809.

**K. STATEMENT OF SUBCONTRACTORS & SUPPLIERS:**

Please provide the names and information for all subcontractors and suppliers used in the performance of the proposed contract, and what portion of work will be assigned to each subcontractor. Subcontractors may not be substituted without the written consent of the City. Use Attachment A if additional pages are necessary. If no subcontractors or suppliers will be used, please write "Not Applicable."

Company Name: N/A

Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Contractor License No.: \_\_\_\_\_ DIR Registration No.: \_\_\_\_\_

Sub-Contract Dollar Amount: \$ \_\_\_\_\_ (per year) \$ \_\_\_\_\_ (total contract term)

Scope of work subcontractor will perform: \_\_\_\_\_

Identify whether company is a subcontractor or supplier: \_\_\_\_\_

Certification type (check all that apply): DBE DVBE ELBE MBE SLBE WBE Not Certified

Contractor must provide valid proof of certification with the response to the bid or proposal to receive participation credit.

Company Name: N/A

Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Contractor License No.: \_\_\_\_\_ DIR Registration No.: \_\_\_\_\_

Sub-Contract Dollar Amount: \$ \_\_\_\_\_ (per year) \$ \_\_\_\_\_ (total contract term)

Scope of work subcontractor will perform: \_\_\_\_\_

Identify whether company is a subcontractor or supplier: \_\_\_\_\_

Certification type (check all that apply): DBE DVBE ELBE MBE SLBE WBE Not Certified

Contractor must provide valid proof of certification with the response to the bid or proposal to receive participation credit.

**L. STATEMENT OF AVAILABLE EQUIPMENT:**

A full inventoried list of all necessary equipment to complete the work specified may be a requirement of the bid/proposal submission.

By signing and submitting this form, the Contractor certifies that all required equipment included in this bid or proposal will be made available one week (7 days) before work shall commence. In instances where the required equipment is not owned by the Contractor, Contractor shall explain how the equipment will be made available before the commencement of work. The City of San

Diego reserves the right to reject any response, in its opinion, if the Contractor has not demonstrated he or she will be properly equipped to perform the work in an efficient, effective matter for the duration of the contract period.

**M. TYPE OF SUBMISSION:** This document is submitted as:

- Initial submission of *Contractor Standards Pledge of Compliance*
- Initial submission of *Contractor Standards Pledge of Compliance* as part of a Cooperative agreement
- Initial submission of *Contractor Standards Pledge of Compliance* as part of a Sole Source agreement
- Update of prior *Contractor Standards Pledge of Compliance* dated \_\_\_\_\_.

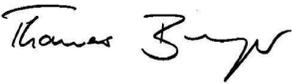
**Complete all questions and sign below.**

Under penalty of perjury under the laws of the State of California, I certify that I have read and understand the questions contained in this Pledge of Compliance, that I am responsible for completeness and accuracy of the responses contained herein, and that all information provided is true, full and complete to the best of my knowledge and belief. I agree to provide written notice to the Purchasing Agent within five (5) business days if, at any time, I learn that any portion of this Pledge of Compliance is inaccurate. Failure to timely provide the Purchasing Agent with written notice is grounds for Contract termination.

I, on behalf of the firm, further certify that I and my firm will comply with the following provisions of SDMC section 22.3004:

- (a) I and my firm will comply with all applicable local, State and Federal laws, including health and safety, labor and employment, and licensing laws that affect the employees, worksite or performance of the contract.
- (b) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of receiving notice that a government agency has begun an investigation of me or my firm that may result in a finding that I or my firm is or was not in compliance with laws stated in paragraph (a).
- (c) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of a finding by a government agency or court of competent jurisdiction of a violation by the Contractor of laws stated in paragraph (a).
- (d) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of becoming aware of an investigation or finding by a government agency or court of competent jurisdiction of a violation by a subcontractor of laws stated in paragraph (a).
- (e) I and my firm will cooperate fully with the City during any investigation and to respond to a request for information within ten (10) working days.

**Failure to sign and submit this form with the bid/proposal shall make the bid/proposal non-responsive. In the case of an informal solicitation, the contract will not be awarded unless a signed and completed *Pledge of Compliance* is submitted.**

Thomas Beyer, Principal		12/6/2019
Name and Title	Signature	Date

**City of San Diego  
CONTRACTOR STANDARDS  
Attachment "A"**

Provide additional information in space below. Use additional Attachment "A" pages as needed. Each page must be signed. Print in ink or type responses and indicate question being answered.

F.3:

The dispute filed in September 2016 in Illinois Circuit Court in DuPage County in connection with our contract for implementation of a pension administrative system was dismissed in January 2017. We remain deeply committed to the State of Illinois and our retirement system clients throughout the U.S. We are focused on delivering value for our clients and positively impacting the communities in which we live and work.

Deloitte Consulting LLP, as one of the leading providers of consulting services, is routinely involved in complex consulting projects, often involving large-scale systems implementations and multiple service providers. Although we are justifiably proud of our record of client satisfaction, such projects do occasionally give rise to disagreements over contract requirements, and we are occasionally, though rarely, involved in litigation with clients pertaining to our consulting services. We do not believe that such matters will affect our ability to provide consulting services, or that they will affect our ability to serve the City in connection with this proposed engagement.

F.6:

Deloitte Consulting LLP, like other major professional services firms, provides a broad array of services to its many clients and has a significant position in respect of large scale projects in the public sector. Occasionally there are disagreements over contract requirements; however, we are not aware of any determination by a court or an independent evaluator that we have defaulted on any contract.

I have read the matters and statements made in this Contractor Standards Pledge of Compliance and attachments thereto and I know the same to be true of my own knowledge, except as to those matters stated upon information or belief and as to such matters, I believe the same to be true. I certify under penalty of perjury that the foregoing is true and correct.

Thomas Beyer, Principal

Print Name, Title



Signature

12/6/2019

Date

## EQUAL OPPORTUNITY CONTRACTING PROGRAM (EOCP)

### GOODS AND SERVICES CONTRACTOR REQUIREMENTS

#### I. City's Equal Opportunity Contracting Commitment.

The City of San Diego (City) promotes equal employment and subcontracting opportunities. The City is committed to ensuring that taxpayer dollars spent on public contracts are not paid to businesses that practice discrimination in employment or subcontracting. The City encourages all companies seeking to do business with the City to share this commitment. Contractors are encouraged to take positive steps to diversify and expand their subcontractor and supplier solicitation base and to offer opportunities to all eligible business firms.

*Contractors must submit the required EOCP documentation indicated below with their proposals. Contractors who fail to provide the required EOCP documentation are considered non-responsive.*

#### II. Definitions.

**Commercially Useful Function:** a Small Local Business Enterprise or Emerging Local Business Enterprise (SLBE/ELBE) performs a commercially useful function when it is responsible for execution of the work and is carrying out its responsibilities by actually performing, managing, and supervising the work involved. To perform a commercially useful function, the SLBE/ELBE shall also be responsible, with respect to materials and supplies used on the contract, for negotiating price, determining quantity and quality, ordering the material, and installing (where applicable) and paying for the material itself.

To determine whether an SLBE/ELBE is performing a commercially useful function, an evaluation will be performed of the amount of work subcontracted, normal industry practices, whether the amount the SLBE/ELBE firm is to be paid under the contract is commensurate with the work it is actually performing and the SLBE/ELBE credit claimed for its performance of the work, and other relevant factors. Specifically, an SLBE/ELBE does not perform a commercially useful function if its role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of meaningful and useful SLBE/ELBE participation, when in similar transactions in which SLBE/ELBE firms do not participate, there is no such role performed.

**Disadvantaged Business Enterprise (DBE):** a certified business that is (1) at least fifty-one (51%) owned by socially and economically Disadvantaged Individuals, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more socially and economically Disadvantaged Individuals; and (2) whose daily business operations are managed and directed by one or more socially and economically disadvantaged owners. Disadvantaged Individuals include Black Americans, Hispanic Americans, Asian Americans, and other minorities, or individual found to be disadvantaged by the Small Business Administration pursuant to Section 8 of the Small Business Reauthorization Act.

**Disabled Veteran Business Enterprise (DVBE):** a certified business that is (1) at least fifty-one percent (51%) owned by one or more Disabled Veterans; and (2) business operations must be managed and controlled by one or more Disabled Veterans. A Disabled Veteran is a veteran of the U.S. military, naval, or air service who resides in California and has a service-connected disability of at least 10% or more. The firm shall be certified by the State of California's Department of General Services, Office of Small and Minority Business.

**Emerging Business Enterprise (EBE):** a business whose gross annual receipts do not exceed the amount set by the City Manager, and which meets all other criteria set forth in the regulations implementing the City's Small and Local Business Preference Program. The City Manager shall review the threshold amount for EBEs on an annual basis, and adjust as necessary to reflect changes in the marketplace.

**Emerging Local Business Enterprise (ELBE):** a Local Business Enterprise that is also an Emerging Business Enterprise.

**Local Business Enterprise (LBE):** a business that has both a principal place of business and a significant employment presence in the County of San Diego, and that has been in operation for twelve (12) consecutive months.

**Minority Business Enterprise (MBE):** a certified business that is (1) at least fifty-one percent (51%) owned by one or more minority individuals, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more minority individuals; and (2) whose daily business operations are managed and directed by one or more minorities owners. Minorities include the groups with the following ethnic origins: African, Asian Pacific, Asian Subcontinent, Hispanic, Native Alaskan, Native American, and Native Hawaiian.

**Other Business Enterprise (OBE):** any business which does not otherwise qualify as Minority, Woman, Disadvantaged, or Disabled Veteran Business Enterprise.

**Principal Place of Business:** a location wherein a business maintains a physical office and through which it obtains no less than fifty percent (50%) of gross annual receipts.

**Significant Employee Presence:** no less than twenty-five percent (25%) of a business's total number of employees.

**Small Business Enterprise (SBE):** a business whose gross annual receipts do not exceed the amount set by the City Manager, and that meets all other criteria set forth in regulations implementing the City's Small and Local Business Preference Program. The City Manager shall review the threshold amount for SBEs on an annual basis, and adjust as necessary to reflect changes in the marketplace. A business certified as a DVBE by the State of California, and that has provided proof of such certification to the City manager, shall be deemed to be an SBE.

**Small Local Business Enterprise (SLBE):** a Local Business Enterprise that is also a Small Business Enterprise.

**Women Business Enterprise (WBE):** a certified business that is (1) at least fifty-one percent (51 %) owned by a woman or women, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more women; and (2) whose daily business operations are managed and directed by one or more women owners.

### **III. Disclosure of Discrimination Complaints.**

As part of its proposal, Contractor shall provide to the City a list of all instances within the past ten (10) years where a complaint was filed or pending against Contractor in a legal or administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors, or suppliers, and a description of the status or resolution of that complaint, including any remedial action taken. (Attachment AA).

### **IV. Work Force Report and Equal Opportunity Outreach Plan.**

- A. Work Force Report. Contractors shall submit with their proposal a Work Force Report (WFR) for approval by the City. (Attachment BB). If the City determines that there are under representations when compared to County Labor Force Availability data, then the Contractor will also be required to submit an Equal Employment Opportunity Plan (EEOP) to the City for approval. Questions regarding the WFR should be directed to the Equal Opportunity Contracting Department.
- B. Duty to Comply with Equal Opportunity Outreach Plan. A Contractor for whom an EEOP has been approved by the City shall use best efforts to comply with that EEOP.

### **V. Small and Local Business Program Requirements.**

The City has adopted a Small and Local Business Enterprise program for goods, services, and consultant contracts. The SLBE requirements are set forth in Council Policy 100-10. For contracts in which the Purchasing Agent is required to advertise for sealed proposals in the City's official newspaper or consultant contracts valued over \$50,000, the City shall:

- A. Apply a maximum of an additional 12% of the total possible evaluation points to the Contractor's final score for SLBE or ELBE participation. Additional points will be awarded as follows:
  - a. If the Contractor achieves 20% participation, apply 5% of the total possible evaluation points to the Contractor's score; or
  - b. If the Contractor achieves 25% participation, apply 10% of the total possible evaluation points to the Contractor's score; or
  - c. If the prime contractor is a SLBE or an ELBE, apply 12% of the total possible evaluation points to the Contractor's score.

## **VI. Maintaining Participation Levels.**

- A. Additional points are based on the Contractor's level of participation proposed prior to the award of the goods, services, or consultant contract. Contractors are required to achieve and maintain the SLBE or ELBE participation levels throughout the duration of the goods, services, or consultant contract.
- B. If the City modifies the original specifications, the Contractor shall make reasonable efforts to maintain the SLBE or ELBE participation for which the additional points were awarded. The City must approve in writing a reduction in SLBE or ELBE participation levels.
- C. Contractor shall notify and obtain written approval from the City in advance of any reduction in subcontract scope, termination, or substitution for a designated SLBE or ELBE subcontractor.
- D. Contractor's failure to maintain SLBE or ELBE participation levels as specified in the goods, services, or consultant contract shall constitute a default and grounds for debarment under Chapter 2, Article 2, Division 8, of the San Diego Municipal Code.
- E. The remedies available to the City under Council Policy 100-10 are cumulative to all other rights and remedies available to the City.

## **VII. Certifications.**

The City accepts certifications of MBE, WBE, DBE, or DVBE from the following certifying agencies:

- A. Current certification by the State of California Department of Transportation (CALTRANS) as DBE.
- B. Current MBE or WBE certification from the California Public Utilities Commission.
- C. DVBE certification is received from the State of California's Department of General Services, Office of Small and Minority Business.
- D. Current certification by the City of Los Angeles as DBE, WBE, or MBE.

Subcontractors' valid proof of certification status e.g., copy of MBE, WBE, DBE, or DVBE certification must be submitted with the proposal or contract documents. MBE, WBE, DBE, or DVBE certifications are listed for informational purposes only.

## **VIII. List of Attachments.**

- AA. Contractors Certification of Pending Actions
- BB. Work Force Report

**AA. CONTRACTORS CERTIFICATION OF PENDING ACTIONS**

As part of this Contract, the Contractor must provide to the City a list of all instances within the past 10 years where a complaint was filed or pending against the Contractor in a legal or administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers, and a description of the status or resolution of that complaint, including any remedial action taken.

CHECK ONE BOX ONLY.

- The undersigned certifies that within the past 10 years the Contractor has NOT been the subject of a complaint or pending action in a legal administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers.
- The undersigned certifies that within the past 10 years the Contractor has been the subject of a complaint or pending action in a legal administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers. A description of the status or resolution of that complaint, including any remedial action taken and the applicable dates is as follows:

DATE OF CLAIM	LOCATION	DESCRIPTION OF CLAIM	LITIGATION (Y/N)	STATUS	RESOLUTION/ REMEDIAL ACTION TAKEN

Contractor Name: Deloitte Consulting LLP

Certified By Thomas Beyer Title Principal

*Thomas Beyer* Name  
Signature  
Date October 21, 2019



### EQUAL OPPORTUNITY CONTRACTING (EOC)

1200 Third Avenue, Suite 200 • San Diego, CA 92101

Phone: (619) 236-6000 • Fax: (619) 236-5904

## BB. WORK FORCE REPORT

The objective of the Equal Employment Opportunity Outreach Program, San Diego Municipal Code Sections 22.3501 through 22.3517, is to ensure that contractors doing business with the City, or receiving funds from the City, do not engage in unlawful discriminatory employment practices prohibited by State and Federal law. Such employment practices include, but are not limited to unlawful discrimination in the following: employment, promotion or upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rate of pay or other forms of compensation, and selection for training, including apprenticeship. Contractors are required to provide a completed Work Force Report (WFR).

#### NO OTHER FORMS WILL BE ACCEPTED CONTRACTOR IDENTIFICATION

Type of Contractor:  Construction  Vendor/Supplier  Financial Institution  Lessee/Lessor  
 Consultant  Grant Recipient  Insurance Company  Other

Name of Company: Deloitte Consulting LLP

ADA/DBA: \_\_\_\_\_

Address (Corporate Headquarters, where applicable): 30 Rockefeller Plaza, 41st Floor

City: New York County: New York State: NY Zip: 92101

Telephone Number: (212) 492-4000 Fax Number: (212) 489-1687

Name of Company CEO: Dan Helfrich

Address(es), phone and fax number(s) of company facilities located in San Diego County (if different from above):

Address: 655 W. Broadway, Suite 700

City: San Diego County: San Diego State: CA Zip: 92101

Telephone Number: (619) 232-6500 Fax Number: (619) 237-6801 Email: \_\_\_\_\_

Type of Business: Consulting Type of License: \_\_\_\_\_

The Company has appointed: OJ Magnan

As its Equal Employment Opportunity Officer (EEOO). The EEOO has been given authority to establish, disseminate and enforce equal employment and affirmative action policies of this company. The EEOO may be contacted at:

Address: 50 S 6th St. Ste. 2800, Minneapolis, MN 55402

Telephone Number: (612) 397-4659 Fax Number: (612) 655-2896 Email: olmagnan@deloitte.com

- One San Diego County (or Most Local County) Work Force - Mandatory
- Branch Work Force \*
- Managing Office Work Force

Check the box above that applies to this WFR.

\*Submit a separate Work Force Report for all participating branches. Combine WFRs if more than one branch per county.

I, the undersigned representative of Deloitte Consulting LLP  
(Firm Name)

San Diego, CA hereby certify that information provided  
(County) (State)

herein is true and correct. This document was executed on this 2nd day of October, 2019

OJ Magnan Thomas Beyer  
Digitally signed by OJ Magnan  
Date: 2019.10.02 16:01:20 -05'00'  
(Authorized Signature)

OJ Magnan Thomas Beyer  
Digitally signed by OJ Magnan  
Date: 2019.10.02 16:02:24 -05'00'  
(Print Authorized Signature Name)

**WORK FORCE REPORT – Page 2**

NAME OF FIRM: Deloitte Consulting LLP DATE: 5/29/2019

OFFICE(S) or BRANCH(ES): San Diego COUNTY: San Diego

INSTRUCTIONS: For each occupational category, indicate number of males and females in every ethnic group. Total columns in row provided. Sum of all totals should be equal to your total work force. Include all those employed by your company on either a full or part-time basis. The following groups are to be included in ethnic categories listed in columns below:

- (1) Black or African-American
- (2) Hispanic or Latino
- (3) Asian
- (4) American Indian or Alaska Native
- (5) Native Hawaiian or Pacific Islander
- (6) White
- (7) Other race/ethnicity; not falling into other groups

Definitions of the race and ethnicity categories can be found on Page 4

ADMINISTRATION OCCUPATIONAL CATEGORY	(1) Black or African American		(2) Hispanic or Latino		(3) Asian		(4) American Indian/ Nat. Alaskan		(5) Pacific Islander		(6) White		(7) Other Race/ Ethnicity	
	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)
Management & Financial		1	1		10	4					24	10		
Professional	1	2	1	1	6	4		1			13	8	2	
A&E, Science, Computer														
Technical														
Sales														
Administrative Support														
Services														
Crafts														
Operative Workers														
Transportation														
Laborers*														

\*Construction laborers and other field employees are not to be included on this page

Totals Each Column	1	3	2	1	16	8		1			37	18	2	
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Grand Total All Employees 89

Indicate by Gender and Ethnicity the Number of Above Employees Who Are Disabled:

Disabled														
----------	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Non-Profit Organizations Only:

Board of Directors														
Volunteers														
Artists														

**WORK FORCE REPORT – Page 3**

NAME OF FIRM: Deloitte Consulting LLP

DATE: 5/29/2019

OFFICE(S) or BRANCH(ES): San Diego

COUNTY: San Diego

INSTRUCTIONS: For each occupational category, indicate number of males and females in every ethnic group. Total columns in row provided. Sum of all totals should be equal to your total work force. Include all those employed by your company on either a full or part-time basis. The following groups are to be included in ethnic categories listed in columns below:

- (1) Black or African-American
- (2) Hispanic or Latino
- (3) Asian
- (4) American Indian or Alaska Native
- (5) Native Hawaiian or Pacific Islander
- (6) White
- (7) Other race/ethnicity; not falling into other groups

Definitions of the race and ethnicity categories can be found on Page 4

TRADE OCCUPATIONAL CATEGORY	(1) Black or African American		(2) Hispanic or Latino		(3) Asian		(4) American Indian/ Nat. Alaskan		(5) Pacific Islander		(6) White		(7) Other Race/ Ethnicity	
	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)
Brick, Block or Stone Masons														
Carpenters														
Carpet, Floor & Tile Installers Finishers														
Cement Masons, Concrete Finishers														
Construction Laborers														
Drywall Installers, Ceiling Tile Inst														
Electricians														
Elevator Installers														
First-Line Supervisors/Managers														
Glaziers														
Helpers; Construction Trade														
Millwrights														
Misc. Const. Equipment Operators														
Painters, Const. & Maintenance														
Pipelayers, Plumbers, Pipe & Steam Fitters														
Plasterers & Stucco Masons														
Roofers														
Security Guards & Surveillance Officers														
Sheet Metal Workers														
Structural Metal Fabricators & Fitters														
Welding, Soldering & Brazing Workers														
Workers, Extractive Crafts, Miners														

Totals Each Column															
--------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

**Grand Total All Employees**

Indicate By Gender and Ethnicity the Number of Above Employees Who Are Disabled:

Disabled															
----------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

## Work Force Report

### HISTORY

The Work Force Report (WFR) is the document that allows the City of San Diego to analyze the work forces of all firms wishing to do business with the City. We are able to compare the firm's work force data to County Labor Force Availability (CLFA) data derived from the United States Census. CLFA data is a compilation of lists of occupations and includes the percentage of each ethnicity we track (American Indian or Alaska Native, Asian, Black or African-American, Native Hawaiian or Pacific Islander, White, and Other) for each occupation. Currently, our CLFA data is taken from the 2010 Census. In order to compare one firm to another, it is important that the data we receive from the consultant firm is accurate and organized in the manner that allows for this fair comparison.

### WORK FORCE & BRANCH WORK FORCE REPORTS

When submitting a WFR, especially if the WFR is for a specific project or activity, we would like to have information about the firm's work force that is actually participating in the project or activity. That is, if the project is in San Diego and the work force is from San Diego, we want a San Diego County Work Force Report<sup>1</sup>. By the same token, if the project is in San Diego, but the work force is from another county, such as Orange or Riverside County, we want a Work Force Report from that county<sup>2</sup>. If participation in a San Diego project is by work forces from San Diego County and, for example, from Los Angeles County and from Sacramento County, we ask for separate Work Force Reports representing your firm from each of the three counties.

### MANAGING OFFICE WORK FORCE

Equal Opportunity Contracting may occasionally ask for a Managing Office Work Force (MOWF) Report. This may occur in an instance where the firm involved is a large national or international firm but the San Diego or other local work force is very small. In this case, we may ask for both a local and a MOWF Report<sup>4, 3</sup>. In another case, when work is done only by the Managing Office, only the MOWF Report may be necessary.<sup>3</sup>

### TYPES OF WORK FORCE REPORTS:

Please note, throughout the preceding text of this page, the superscript numbers one <sup>1</sup>, two <sup>2</sup> & three <sup>3</sup>. These numbers coincide with the types of work force report required in the example. See below:

- <sup>1</sup> One San Diego County (or Most Local County) Work Force – Mandatory in most cases
- <sup>2</sup> Branch Work Force \*
- <sup>3</sup> Managing Office Work Force

*\*Submit a separate Work Force Report for all participating branches. Combine WFRs if more than one branch per county.*

### RACE/ETHNICITY CATEGORIES

**American Indian or Alaska Native** – A person having origins in any of the peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment.

**Asian** – A person having origins in any of the peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

**Black or African American** – A person having origins in any of the Black racial groups of Africa.

**Native Hawaiian or Pacific Islander** – A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

**White** – A person having origins in any of the peoples of Europe, the Middle East, or North Africa.

**Hispanic or Latino** – A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin.

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## **Exhibit A: Work Force Report Job Categories – Administration**

Refer to this table when completing your firm's Work Force Report form(s).

### **Management & Financial**

Advertising, Marketing, Promotions, Public  
Relations, and Sales Managers  
Business Operations Specialists  
Financial Specialists  
Operations Specialties Managers  
Other Management Occupations  
Top Executives

### **Professional**

Art and Design Workers  
Counselors, Social Workers, and Other Community  
and Social Service Specialists  
Entertainers and Performers, Sports and Related  
Workers  
Health Diagnosing and Treating Practitioners  
Lawyers, Judges, and Related Workers  
Librarians, Curators, and Archivists  
Life Scientists  
Media and Communication Workers  
Other Teachers and Instructors  
Postsecondary Teachers  
Primary, Secondary, and Special Education School  
Teachers  
Religious Workers  
Social Scientists and Related Workers

### **Architecture & Engineering, Science, Computer**

Architects, Surveyors, and Cartographers  
Computer Specialists  
Engineers  
Mathematical Science Occupations  
Physical Scientists

### **Technical**

Drafters, Engineering, and Mapping Technicians  
Health Technologists and Technicians  
Life, Physical, and Social Science Technicians  
Media and Communication Equipment Workers

### **Sales**

Other Sales and Related Workers  
Retail Sales Workers  
Sales Representatives, Services  
Sales Representatives, Wholesale and  
Manufacturing  
Supervisors, Sales Workers

### **Administrative Support**

Financial Clerks  
Information and Record Clerks  
Legal Support Workers

Material Recording, Scheduling, Dispatching,  
and Distributing Workers  
Other Education, Training, and Library  
Occupations  
Other Office and Administrative Support  
Workers  
Secretaries and Administrative Assistants  
Supervisors, Office and Administrative Support  
Workers

### **Services**

Building Cleaning and Pest Control Workers  
Cooks and Food Preparation Workers  
Entertainment Attendants and Related  
Workers  
Fire Fighting and Prevention Workers  
First-Line Supervisors/Managers, Protective  
Service Workers  
Food and Beverage Serving Workers  
Funeral Service Workers  
Law Enforcement Workers  
Nursing, Psychiatric, and Home Health Aides  
Occupational and Physical Therapist Assistants  
and Aides  
Other Food Preparation and Serving Related  
Workers  
Other Healthcare Support Occupations  
Other Personal Care and Service Workers  
Other Protective Service Workers  
Personal Appearance Workers  
Supervisors, Food Preparation and Serving  
Workers  
Supervisors, Personal Care and Service  
Workers  
Transportation, Tourism, and Lodging  
Attendants

### **Crafts**

Construction Trades Workers  
Electrical and Electronic Equipment  
Mechanics, Installers, and Repairers  
Extraction Workers  
Material Moving Workers  
Other Construction and Related Workers  
Other Installation, Maintenance, and Repair  
Occupations  
Plant and System Operators  
Supervisors of Installation, Maintenance, and  
Repair Workers  
Supervisors, Construction and Extraction  
Workers  
Vehicle and Mobile Equipment Mechanics,

Installers, and Repairers  
Woodworkers

**Operative Workers**

Assemblers and Fabricators  
Communications Equipment Operators  
Food Processing Workers  
Metal Workers and Plastic Workers  
Motor Vehicle Operators  
Other Production Occupations  
Printing Workers  
Supervisors, Production Workers  
Textile, Apparel, and Furnishings Workers

**Transportation**

Air Transportation Workers  
Other Transportation Workers  
Rail Transportation Workers  
Supervisors, Transportation and Material  
Moving Workers  
Water Transportation Workers

**Laborers**

Agricultural Workers  
Animal Care and Service Workers  
Fishing and Hunting Workers  
Forest, Conservation, and Logging Workers  
Grounds Maintenance Workers  
Helpers, Construction Trades  
Supervisors, Building and Grounds Cleaning  
and Maintenance Workers  
Supervisors, Farming, Fishing, and Forestry  
Workers

**Exhibit B: Work Force Report Job Categories-Trade**

**Brick, Block or Stone Masons**  
Brickmasons and Blockmasons  
Stonemasons

**Carpenters**

**Carpet, floor and Tile Installers and Finishers**  
Carpet Installers  
Floor Layers, except Carpet, Wood and Hard  
Tiles  
Floor Sanders and Finishers  
Tile and Marble Setters

**Cement Masons, Concrete Finishers**  
Cement Masons and Concrete Finishers  
Terrazzo Workers and Finishers

**Construction Laborers**

**Drywall Installers, Ceiling Tile Inst**  
Drywall and Ceiling Tile Installers  
Tapers

**Electricians**

**Elevator Installers and Repairers**

**First-Line Supervisors/Managers**  
First-line Supervisors/Managers of  
Construction Trades and Extraction Workers

**Glaziers**

**Helpers, Construction Trade**

Brickmasons, Blockmasons, and Tile and  
Marble Setters

Carpenters

Electricians

Painters, Paperhangers, Plasterers and Stucco  
Pipelayers, Plumbers, Pipefitters and

Steamfitters

Roofers

All other Construction Trades

**Millwrights**

Heating, Air Conditioning and Refrigeration  
Mechanics and Installers  
Mechanical Door Repairers

Control and Valve Installers and Repairers

Other Installation, Maintenance and Repair  
Occupations

**Misc. Const. Equipment Operators**

Paving, Surfacing and Tamping Equipment  
Operators

Pile-Driver Operators

Operating Engineers and Other Construction  
Equipment Operators

**Painters, Const. Maintenance**

Painters, Construction and Maintenance  
Paperhangers

**Pipelayers and Plumbers**

Pipelayers

Plumbers, Pipefitters and Steamfitters

**Plasterers and Stucco Masons****Roofers****Security Guards & Surveillance Officers****Sheet Metal Workers****Structural Iron and Steel Workers****Welding, Soldering and Brazing Workers**

Welders, Cutter, Solderers and Brazers

Welding, Soldering and Brazing Machine  
Setter, Operators and Tenders

**Workers, Extractive Crafts, Miners**