AGREEMENT BETWEEN
SAN DIEGO UNIFIED PORT DISTRICT
and
DELOITTE CONSULTING, LLP
for
Salesforce.com Customer Relationship Management Implementation Services

The parties to this Agreement are the SAN DIEGO UNIFIED PORT DISTRICT, a public corporation ("District") and Deloitte Consulting LLP., ("Service Provider"). The parties agree to the following:

1. **SCOPE OF SERVICES.** Service Provider shall furnish all technical and professional labor, and materials to materially comply with Attachment A, Scope of Services, attached hereto and incorporated herein, as requested by District. Service Provider shall keep the Executive Director of the District or their designated representative informed of the progress of said services at all times.

2. **TERM OF AGREEMENT.** This Agreement shall commence on or after **June 3, 2019** and shall terminate on **January 31, 2020**, subject to earlier termination as provided below.

3. **COMPENSATION.** For performance of services rendered pursuant to this Agreement and as further described in Attachment B, Compensation and Invoicing, attached hereto and incorporated herein; District shall compensate Service Provider based on the following, subject to the limitation of the maximum expenditure provided herein:

    a. **Maximum Expenditure.** The maximum expenditure under this Agreement shall not exceed $1,500,000. Said expenditure shall include without limitation all sums, charges, reimbursements, costs and expenses provided for herein. Service Provider shall not be required to perform further services after compensation has been expended. In the event that the Service Provider anticipates the need for services in excess of the maximum Agreement amount, the District shall be promptly notified in writing. District and Service Provider must approve an amendment to this Agreement before additional fees and costs are incurred.

b. **Progress Documentation.** Service Provider shall provide District progress reports in a format and on a schedule as agreed upon by the parties. Progress reports shall include a description of work completed, cumulative dollar costs incurred, anticipated work for the next reporting period, percentage of work complete, and the expected completion date for remaining work. The report shall identify problem areas and important issues that may affect project cost and/or schedule. The report shall present actual percent completion versus planned percent completion.

d. **Additional Services; Task Authorizations**

(1) Additional services may be required for the completion of the services specified in this Agreement. For performance of Additional Services, District shall compensate Service Provider using the terms and conditions in Attachment B, Compensation and Invoicing. With Additional Services the maximum amount of this agreement shall not exceed $1,500,000. If Additional Services are required, they shall be undertaken by Service Provider only upon issuance of a Task Authorization (TA), Exhibit A, attached hereto and incorporated herein, for said services.

(2) An estimate of the level of effort shall be submitted to the District and negotiated for each Task Authorization. Pricing of each Task Authorization shall be governed by the cost and pricing information attached hereto and made a part of this Agreement as Attachment B, Compensation and Invoicing.

(3) A Task Authorization shall not be considered effective until the Task Authorization form has been signed by District and Service Provider.

(4) Service Provider shall bill for Additional Services in accordance with the terms of payment, including the documentation required in this Agreement. In addition, invoices for Additional Services shall cite the appropriate Task Authorization (TA) number.

4. **<u>RECORDS</u>**

a. Service Provider shall maintain full and complete billing and payment records of the cost of services performed under this Agreement. Such records shall be open to inspection of District at all reasonable times in the City of San Diego and such records shall be kept for at least three (3) years after the termination of this Agreement.

b. Such records shall be maintained by Service Provider for a period of three (3) years after completion of services to be performed under this Agreement or until all disputes, appeals, litigation or claims arising from this Agreement have been resolved, whichever is later.

c. Service Provider understands and agrees that District, at all times under this Agreement, has the right to review and to audit billing and payment records, whether or not final, which Service Provider or anyone else associated with the work has prepared or which relate to the work which Service Provider is performing for District pursuant to this Agreement regardless of whether such records have previously been provided to District. Service Provider shall provide District at Service Provider's expense a copy of all such records within five (5) working days of a written request by District. District's right shall also include inspection upon reasonable advance written notice, during normal business times, of the Service Provider's office or facilities where Service Provider is primarily are engaged in the performance of services pursuant to this Agreement. Service Provider shall, at no cost to District furnish reasonable facilities and assistance for such review and audit.

5. **SERVICE PROVIDER'S SUB-CONTRACTORS**

a. It may be necessary for Service Provider to sub-contract for the performance of certain technical services or other services for Service Provider to perform and complete the required services; provided, however, except as provided below, all Service Provider's sub-contractors shall be subject to prior written approval by District. The District hereby consents to Service Provider subcontracting or assigning any portion of the Services to any affiliate or related entity, whether located within or outside the United States. The Service Provider shall remain responsible to District for any and all services and obligations required under this Agreement, whether performed by Service Provider or Service Provider's sub-contractors. Service Provider shall compensate each Service Provider's sub-contractors in the time periods required by law. Any Service Provider's sub-contractors employed by Service Provider shall be independent Service Providers and not agents of District. Service Provider shall insure that Service Provider's sub-contractors satisfy all substantive requirements for the work set forth by this Agreement, including insurance and indemnification.

b. Listed below are the firms that the District has approved as Service Provider's sub-contractors to provide services under this Agreement:

NAME OF FIRM	TYPE OF SERVICES PROVIDED
N/A	N/A

c. Service Provider shall also include a clause in its Agreements with Service Provider's sub-contractors which reserves the right, during the performance of this Agreement and for a period of three (3) years following termination of this Agreement, for a District representative to audit any cost, compensation or settlement resulting from any items set forth in this Agreement. This clause shall also require Service Provider's sub-contractors to retain all necessary records for a period of three (3) years after completion of services to be performed under this Agreement or until all disputes, appeals, litigation or claims arising from this Agreement have been resolved, whichever is later.

6. **COMPLIANCE**

a. In performance of this Agreement, Service Provider and Service Provider's sub-contractors shall comply with the California Fair Employment and Housing Act, the American with Disabilities Act, and all other applicable federal, state, and local laws prohibiting discrimination, including without limitation, laws prohibiting discrimination because of age, ancestry, color, creed, denial of family and medical care leave, disability, marital status, medical condition, national origin, race, religion, sex, or sexual orientation. Service Provider shall comply with the prevailing wage provisions of the Labor Code, and the Political Reform Act provisions of the Government Code, as applicable.

b. Service Provider shall comply with all Federal, State, regional and local laws, and district Ordinances and Regulations applicable to Service Provider in its performance of services under this Agreement as exist now or as may be added or amended.

7. **INDEPENDENT ANALYSIS.** Service Provider shall provide the services required by this Agreement and arrive at conclusions with respect to the rendition of information, advice or recommendations, independent of the control and direction of District, other than normal contract monitoring provided, however, Service Provider shall possess no authority with respect to any District decision.

8. **ASSIGNMENT.** This is a personal services Agreement between the parties and Service Provider shall not assign or transfer voluntarily or involuntarily any of its rights, duties, or obligations under this Agreement without the express written consent of Executive Director (President/CEO) of District in each instance, except as set forth in Section 5(a).

9. **INDEMNIFY, DEFEND, HOLD HARMLESS AND LIMITATION ON LIABILITY**

a. **Duty to Indemnify, duty to defend and hold harmless.** To the fullest extent provided by law, Service Provider agrees to defend, indemnify and hold harmless the District, its agents, officers or employees, from and against any third party claim, demand, action, proceeding, suit, liability, damage, cost (including reasonable attorneys' fees) or expense solely for physical damage to real or tangible personal property or bodily injury or death to any person, including Service Provider's officers, agents, subcontractors, employees, ("Claim"), to the extent directly and proximately caused by, the negligence or intentional misconduct of Service Provider while engaged in the performance of services by Service Provider as provided for in this Agreement. The Service Provider's duty to defend, indemnify, and hold harmless shall not include any Claim arising from the active negligence, sole negligence or willful misconduct of the District, its agents, officers, or employees.

b. The Service Provider further agrees that the duty to indemnify, and the duty to defend the District as set forth in 9.a, requires that Service Provider pay all reasonable attorneys' fees and costs District incurs associated with or related to enforcing the indemnification provisions, and defending any Claim as defined in 9.a arising from the negligence or intentional misconduct of Service Provider while engaged in the performance of the services of the Service Provider provided for in this Agreement.

c. The District may, at its own election, conduct its defense, or participate in the defense of any Claim related in any way to this Agreement provided that no settlement or payment of any Claim shall be made by the District without the prior written approval of the Service Provider. If the District chooses at its own election to conduct its own defense, participate in its own defense or obtain independent legal counsel in defense of any Claim arising from the services of Service Provider provided for in this

Agreement, the District agrees to pay all reasonable attorneys' fees and all costs incurred by District.

d. Service Provider, its subsidiaries and subcontractors, and their respective personnel shall not be liable to the District for any claims, liabilities, or expenses relating to this Agreement, any Attachment A or Task Authorization, or the Services ("Claims") for an aggregate amount in excess of the fees paid by District to Service Provider under such Attachment A or Task Authorization, except to the extent resulting from the recklessness, bad faith or intentional misconduct of Service Provider or its subcontractors. In no event shall Service Provider, its subsidiaries or subcontractors, or their respective personnel be liable to Client for any loss of use, data, 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, any Attachment A or Task Authorization, or the Services.

10. **<u>INSURANCE REQUIREMENTS</u>**

a. Service Provider shall at all times during the term of this Agreement maintain, at its expense, the following minimum levels and types of insurance:

(1) Commercial General Liability (including, without limitation, Contractual Liability pursuant to policy terms and conditions, Personal Injury, Advertising Injury, and Products/Completed Operations) coverages, with coverage at least as broad as Insurance Services Office Commercial General Liability Coverage (occurrence Form CG 0001) with limits no less than one million dollars ($1,000,000) per Occurrence and two million dollars ($2,000,000) Aggregate for bodily injury, personal injury and property damage.

(a) The deductible or self-insured retention on this Commercial General Liability shall not exceed $5,000 unless District has approved of a higher deductible or self-insured retention in writing.

(b) The Commercial General Liability policy shall include the District; its agents, officers and employees as additional insureds in the form as required by the District specific to the Service Provider's wrongful acts or omissions in performance of Services under this Agreement. An exemplar endorsement is attached (Exhibit B, Certificate of Insurance, attached hereto and incorporated herein).

(c) The coverage provided to the District, as an additional insured and the Service Provider's activities hereunder, shall be primary and any insurance or self-insurance maintained by the District shall be excess of the Service Provider's insurance and shall not contribute to it.

(d) The Commercial General Liability policy shall be endorsed to include a waiver of transfer of rights of recovery against the District ("Waiver of Subrogation").

(2) Commercial Automobile Liability (Owned, Scheduled, Non-Owned, or Hired Automobiles) written at least as broad as Insurance Services Office Form Number CA 0001 with limits of no less than one million dollars ($1,000,000) combined single limit per accident for bodily injury and property damage.

(3) Workers' Compensation, statutory limits, is required of the Service Provider and all sub-consultants (or be a qualified self-insured) under the applicable laws and in accordance with "Workers' Compensation and Insurance Act", Division IV of the Labor Code of the State of California and any Acts amendatory thereof.

Employer's Liability, in an amount of not less than one million dollars ($1,000,000) each accident, $1,000,000 disease policy limit and $1,000,000 disease each employee. This policy shall be endorsed to include a waiver of subrogation endorsement, where permitted by law.

(4) Professional Liability insurance in the amount of $1,000,000 per claim and $1,000,000 aggregate.

(a) At the end of the agreement period, Consultant shall maintain, at its own expense, continued Professional Liability insurance of not less than two (2) years, in an amount no less than the amount required pursuant to this Agreement as long as such coverage remains commercially available and financially viable in the market place.

(b) Alternately, if the existing Professional Liability is terminated during the above referenced two-year period, Consultant shall maintain at its own expense, "tail" coverage in the same minimum amount as set forth in this paragraph as long as such coverage remains commercially available and financially viable in the market place.

(c) All coverages under this section shall be effective as of the effective date of this Agreement or provide for a retroactive date of placement that coincides with the effective date of this Agreement.

(5) Umbrella or Excess Liability insurance with limits no less than one million dollars ($1,000,000) per occurrence and aggregate. This policy must provide excess insurance over the same terms and conditions required above for the General Liability, Automobile Liability and Employer's Liability policies.

b. Service Provider shall furnish District with industry standard Acord certificates of insurance coverage for all the policies described above upon execution of this Agreement and upon renewal of any of these policies. A Certificate of Insurance in a form acceptable to the District as determined by A.M. Best ratings of at least A-, VIII or equivalent ratings from another nationally recognized rating firm, an exemplar Certificate of Insurance is attached as Exhibit B and made a part hereof, evidencing the existence of the necessary insurance policies and blanket endorsements required shall be kept on file with the District. Except in the event of cancellation for non-payment of premium, in which case notice shall be 10 days, all such policies must be endorsed so Service Provider must notify the District in writing at least 30 days in advance of policy cancellation. Service Provider shall also provide notice to District prior to cancellation of, or any adverse change in, the stated coverages of insurance unless Service Providers obtains replacement coverage meeting the terms and conditions hereunder without lapse.

c. The industry standard Acord Certificate of Insurance must delineate the name of the insurance company affording coverage and the policy number(s) specifically referenced to each type of insurance, either on the face of the certificate or on an attachment thereto. If an addendum setting forth multiple insurance companies or underwriters is attached to the certificate of insurance, the addendum shall indicate the insurance carrier or underwriter who is the lead carrier and the applicable policy number for the CGL coverage.

d. Furnishing insurance specified herein by the District will in no way relieve or limit any responsibility or obligation imposed by the Agreement or otherwise on Service Provider or Service Provider's sub-contractors or any tier of Service Provider's sub-contractors.

11. **APPROVAL OF SERVICES.** Service Provider shall be responsible for its services and Deliverables as defined in Section 16 resulting therefrom

conforming in all material respects to the requirements set forth in the applicable Task Authorization. To the extent that the review and acceptance process is not defined in Attachment A (Scope of Services) to this , the District shall review and approve each Deliverable and notify the Service Provider of any discovered deficiencies ("Deficiencies") therein within five (5) business days. Within two (2) business days or such other period agreed upon in the applicable Task Authorization, Service Provider shall correct such Deficiencies without additional compensation. District shall complete its review of the corrected Deliverable and notify Service Provider in writing of acceptance or rejection in accordance with the foregoing provisions of this Section. Such review shall be limited to the identified Deficiencies. Deliverables shall be deemed accepted by the District if not rejected, in writing, within five (5) business days of delivery. To the extent that any Deliverable has been approved by District at any stage of Service Provider's performance under a Task Authorization, Service Provider shall be entitled to rely on such approval for purposes of all subsequent stages of Service Provider's performance under such Task Authorization. In the event an approved Deliverable differs from the Specifications for such Deliverable, the Specifications shall be deemed modified to conform with such approved Deliverable. If Service Provider is unable to correct any Deficiency in a Deliverable within the period of time set forth above, District shall be entitled, at its option, to a refund or credit of professional fees paid to Service Provider under the applicable Task Authorization with respect to the services giving rise to such Deliverable and this shall be District's sole and exclusive remedy, and Service Provider's sole and exclusive obligation, with respect to any claim that the Deliverables do not conform to the requirements of this Agreement or such Task Authorization. Service Provider shall make decisions and carry out its responsibilities hereunder in a timely manner and shall bear all costs incident thereto so as not to delay the District, the project, or any other person related to the project, including the Service Provider or its agents, employees, or subcontractors.

12. **<u>INDEPENDENT CONTRACTOR</u>.** Service Provider and any agent or employee of Service Provider shall act in an independent capacity and not as officers or employees of District. The District assumes no liability for the Service Provider's actions and performance, nor assumes responsibility for taxes, bonds, payments or other commitments, implied or explicit by or for the Service Provider. Service Provider shall not have authority to act as an agent on behalf of the District unless specifically authorized to do so in writing. Service Provider acknowledges that it is aware that because it is an independent contractor, District is making no deductions from its fee and is not contributing to any fund on its behalf. Service Provider disclaims the right to any fee or benefits except as expressly provided for in this Agreement.

13. **<u>ADVICE OF COUNSEL</u>.** The parties agree that they are aware that they have the right to be advised by counsel with respect to the negotiations, terms and conditions of this Agreement, and that the decision of whether or not to seek the advice of counsel with respect to this Agreement is a decision which is the sole responsibility of each of the parties hereto. This Agreement 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 Agreement. The formation, interpretation and performance of this Agreement shall be governed by the laws of the State of California.

14. **<u>INDEPENDENT REVIEW</u>.** Each party hereto declares and represents that in entering into this Agreement it has relied and is relying solely upon its own judgment, belief and knowledge of the nature, extent, effect and consequence relating thereto. Each party further declares and represents that this Agreement is being made without reliance upon any statement or representation not contained herein of any other party, or any representative, agent or attorney of any other party.

15. **<u>INTEGRATION AND MODIFICATION</u>.** This Agreement contains the entire Agreement between the parties and supersedes all prior negotiations, discussion, obligations and rights of the parties in respect of each other regarding

the subject matter of this Agreement. There is no other written or oral understanding between the parties. No modifications, amendment or alteration of this Agreement shall be valid unless it is in writing and signed by the parties hereto.

16. **OWNERSHIP OF RECORDS.** Upon full payment under an applicable Task Authorization, any and all materials and documents, including without limitation drawings, specifications, computations, designs, plans, investigations and reports, prepared by Service Provider for delivery to District pursuant to this Agreement ("Deliverables"), shall be the property of District and the Service Provider shall deliver such Deliverables to District at the Don L. Nay Port Administration Building (located at 3165 Pacific Highway, San Diego, California 92101), except to the extent they contain intellectual property created prior to or independently of the performance of the Services, or created by Service Provider or its subcontractors as a tool for their use in performing the Services, plus any modifications or enhancements thereto and derivative works based thereon ("Service Provider Technology"). Service Provider grants to District the right to use, for District's internal business purposes, any Service Provider Technology included in the Deliverables in connection with its use of the Deliverables. However, Service Provider shall have the right to make duplicate copies of such materials and documents for its own file, or other purposes as may be expressly authorized in writing by District. Said materials and documents prepared or acquired by Service Provider pursuant to this Agreement (including any duplicate copies kept by the Service Provider) shall not be shown to any other public or private person or entity, except as authorized by District or as required by law or regulation or to respond to governmental inquiries, or in accordance with applicable professional standards or rules, or in connection with litigation pertaining to this Agreement or a Task Authorization. Service Provider shall not disclose to any other public or private person or entity any information regarding the activities of District, except as expressly authorized in writing by District or as required by law or regulation or to respond to governmental inquiries, or in

accordance with applicable professional standards or rules, or in connection with litigation pertaining to this Agreement or a Task Authorization.

17. **TERMINATION.** In addition to any other rights and remedies allowed by law, the either party may terminate this Agreement at any time with or without cause by giving thirty (30) days written notice to the other party of such termination and specifying the effective date thereof. In the event of a termination with cause, the breaching party shall have the right to cure the breach within the notice period. In the event of any termination, to the extent not in conflict with law or independence or professional rules, all finished or unfinished documents and other materials shall at the option of District be delivered by Service Provider to the Don L. Nay Port Administration Building (located at 3165 Pacific Highway, San Diego, California 92101) provided that any unfinished documents shall be provided on an as-is basis, without warranty or indemnity of any kind. Termination of this Agreement by Executive Director (President/CEO) pursuant to this paragraph shall release District from any further fee or claim for fees hereunder by Service Provider other than the fee earned for services which were performed prior to termination but not yet paid. Said fee shall be calculated and based on the schedule as provided in this Agreement.

18. **DISPUTE RESOLUTION**

a. If a dispute arises out of or relates to this Agreement, or the alleged breach thereof, and is not settled by direct negotiation or such other procedures as may be agreed, and if such dispute is not otherwise time barred, the parties agree to first try in good faith to settle the dispute amicably by mediation administered at San Diego, California, by the American Arbitration Association, or by such other provider as the parties may mutually select, prior to initiating any litigation or arbitration. Notice of any such dispute must be filed in writing with the other party within a reasonable time after the dispute has arisen. Any resultant Agreements shall be documented and may be used as the basis for an amendment or directive as appropriate.

b. If mediation is unsuccessful in settling all disputes that are not otherwise time barred within ninety (90) days after the effective date of the written notice beginning the mediation process (or such longer period as the parties may agree to in writing), and if both parties agree in writing, any still unresolved disputes may be resolved by arbitration administered at San Diego, California, by the American Arbitration Association, or by such other provider as the parties may mutually select, provided, however, that the Arbitration Award shall be non-binding and advisory only. Any resultant Agreements shall be documented and may be used as the basis for an amendment or directive as appropriate. On demand of the arbitrator or any party to this Agreement, sub-contractor and all parties bound by this arbitration provision agree to join in and become parties to the arbitration proceeding.

c. The foregoing mediation and arbitration procedures notwithstanding, all claim filing requirements of the Agreement documents, the California Government Code, and otherwise, shall remain in full force and effect regardless of whether or not such dispute avoidance and resolution procedures have been implemented, and the time periods within which claims are to be filed or presented to the District Clerk as required by said Agreement, Government Code, and otherwise, shall not be waived, extended or tolled thereby. If a claim is not timely filed or presented, such claim shall be time barred and the above dispute avoidance and resolution procedures, whether or not implemented or then pending, shall likewise be time barred as to such claims.

19. **PAYMENT BY DISTRICT.** Payment by the District pursuant to this Agreement does not represent that the District has made a detailed examination, audit, or arithmetic verification of the documentation submitted for payment by the Service Provider, made an exhaustive inspection to check the quality or quantity of the services performed by the Service Provider, made an examination to ascertain how or for what purpose the Service Provider has used money previously paid on

account by the District, or constitute a waiver of claims against the Service Provider by the District. The District may in its sole discretion withhold payments or seek reimbursement from the Service Provider for fees previously paid by the District for work performed by or on behalf of the Service Provider that did not comply with this Agreement, until such work is performed in compliance with this Agreement, upon thirty (30) days' prior written notice if not cured within such period. It is the express intent of the parties to this Agreement to protect the District from loss because of conduct by or on behalf of the Service Provider by agreeing to the foregoing.

20. **COMPLIANCE WITH PREVAILING WAGE LAWS (IF APPLICABLE)**

a. Service Provider acknowledges and agrees that it is the sole and exclusive responsibility of Service Provider to: (a) verify that all persons and/or entities (including, but not limited to, Service Provider or Subcontractors) who provide any labor, services, equipment and/or materials (collectively, "Services") in connection with any work shall comply with the requirements of California's and any other prevailing wage laws ("PWL") to the extent such laws are applicable and (b) determine whether any Services are subject to the PWL by obtaining a determination by means that do not involve the District.

21. **CAPTIONS.** The captions by which the paragraphs of this Agreement are identified are for convenience only and shall have no effect upon its interpretation.

22. **EXECUTIVE DIRECTOR'S SIGNATURE.** It is an express condition of this Agreement that said Agreement shall not be complete nor effective until signed by either the Executive Director (President/CEO) or Authorized Designee on behalf of the District and by Authorized Representative of the Service Provider.

a. Submit all correspondence regarding this Agreement to:

Keith Coffey
Chief Technology Officer, Information Technology
P.O. Box 120488
San Diego, CA 92112-0488
Tel. (619) 686-7285
Email: kcoffey@portofsandiego.org

b. The Service Provider's Authorized Representative assigned below has the authority to authorize changes to the scope, terms and conditions of this Agreement:

Name/title	Thomas Beyer, Principal
Name of firm	Deloitte Consulting, LLP.
Address	655 W Broadway, Suite 700 San Diego, CA 92101-8590
Tel.	(858) 239-3970
Fax	(619) 237-6801
Email:	thbeyer@deloitte.com

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c. Written notification to the other party shall be provided, in advance, of changes in the name or address of the designated Authorized Representative.

SAN DIEGO UNIFIED PORT DISTRICT	DELOITTE CONSULTING, LLP.
Keith Coffey Chief Technology Officer	Thomas Beyer Principal, Deloitte Consulting, LLP.

Approved as to form and legality:
GENERAL COUNSEL

By: Assistant/Deputy

A manually signed copy of this Agreement transmitted by email or any other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original signed copy of this Agreement.

ATTACHMENT A
SCOPE OF SERVICES

San Diego Unified Port District

This Scope of Services ("SOW") is for **Deloitte Consulting LLP.** ("SERVICE PROVIDER") to implement an enterprise Customer Relationship Management System (CRM) on the **Salesforce.com platform**. The objective of the District is to create a world class customer experience for anyone who consumes San Diego Unified Port District, ("DISTRICT") services in a cost-effective way - keeping customer data secure while affording streamlined accessibility to District information and services. The solution will, as defined by the Specifications under this SOW, employ forms and work flow management, communication, and reporting tools combined with a knowledge base of frequently asked questions; enabling District staff to optimize their responses to customer queries from all types of media. This system will be combined with the District's website to provide a consistent message to the District's customers, enable system users within the District to have visibility into resolution of any reported issue. This system will combine with a Permitting and Reservation system to create a seamless interface for District customers.

1. Scope Overview

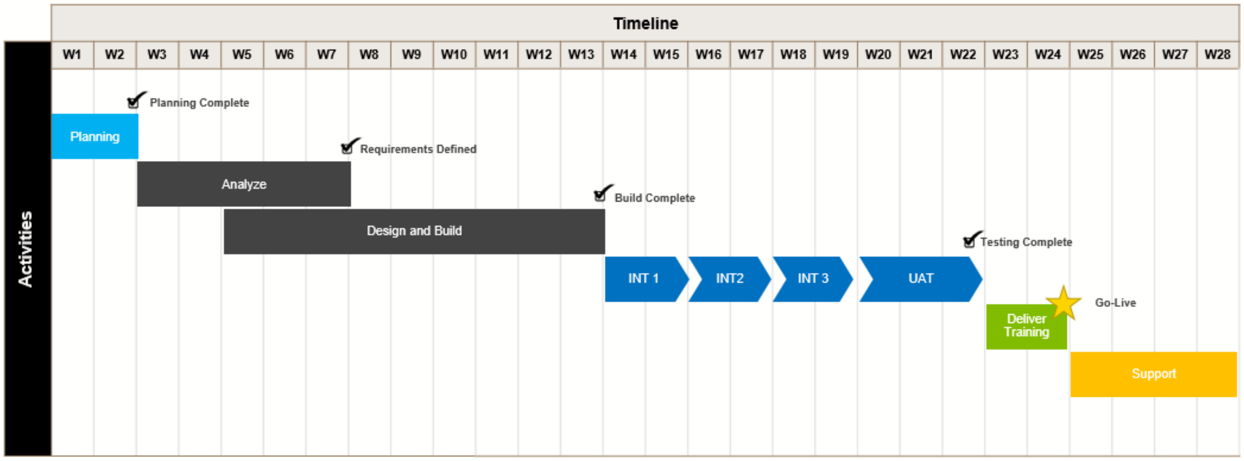
Through discovery sessions held with the District, Service Provider has identified the tasks to be undertaken as part of the services provided with this SOW. Service Provider has identified replacing the existing the SAP CRM system used by several departments with a Salesforce.com Service Cloud CRM as the key objective for Phase 1.
The project's scope entails account and contact management, case management, internal and external communications, a subset of the District's permitting processes, knowledge management, grants management, and an online Public self-service Portal. Service Provider will, in consultation with the appropriate stakeholders from the District, define detailed system requirements (in the form of "User Stories" and "Acceptance Criteria"), design the systems architecture, develop the system, integrate with legacy and new 3rd party applications as identified in this document, conduct thorough testing, and deliver the appropriate training curriculum to allow for a smooth transition for the District and its users. Throughout the project, Service Provider will require the District's assistance with certain activities which are defined in the roles and responsibilities section below, along with others that may be identified and agreed upon during the course of engagement. Further details on the project's scope are provided in the subsequent sections.

2. Timeline and Deliverables

Timeline

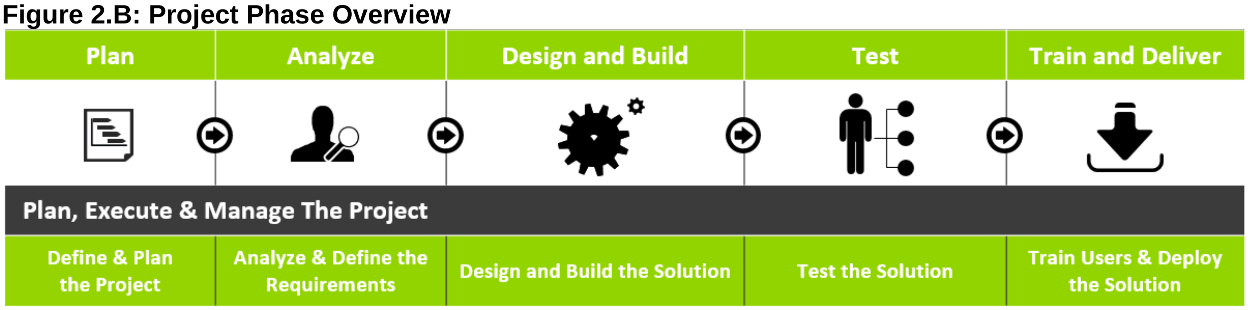
After discussions with the various District departments, Service Provider has concluded that approximately **28 weeks** will be required to deliver this SOW using a Hybrid Agile approach. This SOW is tentatively scheduled to begin on or after **June 3, 2019** We provide a high-level project timeline in the figure below:

Figure 2.A: Project Timeline



The purpose of each of these phases is outlined as follows:

Figure 2.B: Project Phase Overview



Plan

Service Provider and the District will develop and refine the project plan, so that both parties have a detailed understanding of the timing of key activities and an opportunity for making adjustments that conform to the high-level Project Timeline depicted in Figure 2.A above. The planning phase will also be used to finalize the tools and engagement model to be used throughout the rest of the project.

Analyze

Service Provider will begin the project with the Analyze phase where we will conduct process deep dives to define detailed department-specific functional requirements (in the form of “User Stories” and “Acceptance Criteria”), which will be refined and approved by the District. Once approved, a brief requirements analysis will be completed to validate assumptions made during initial project scoping. If necessary, Service Provider will then work with the District’s project leadership team to refine the project’s scope, adjust priorities, and reallocate resources as required (for example – if feedback from the users coming out of the deep dives indicate that more effort and resource effort is required in a particular area, and less in another, we will work with the District to alter the plan through the agreed upon Change Order Process).

Design and Build

Service Provider and the District will conduct a series of Design and Build sprints in order 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, Service Provider will perform systems unit testing in throughout this phase to ensure the solution is ready for Integration Testing with District users.

Test

The Test Phase will be broken up into 2 distinct sub-phases: Integration Testing and Use Acceptance Testing. Integration Testing will be managed by Service Provider but executed by District 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 District and focused on testing full end-to-end business scenarios to verify system usability and culminate with user acceptance sign-off.

Train & Deliver

Service Provider will manage the development of the training plan, curriculum, and training materials. This will include conducting train-the-trainer sessions and supporting end-user training. In addition, we will support the District 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 will all be facilitated.

Support Phase

After deployment, the project will transition into a support phase where the project team will support the District in the new environment. Service Provider will provide this support phase for 4 weeks after the go-live date. Activities during this phase consist of completing critical and high bug fixes and if capacity permits, deploying of minor enhancements.

Milestone Deliverables

The table below (Figure 2.C) provides a detailed overview of the milestone deliverables that will be developed and delivered to the District over the course of the engagement.

Figure 2.C: Milestone Deliverable Expectations

Deliverable Title	Deliverable Expectations
Project Scope Document	The purpose of the Project Scope Document is to define the project scope in terms of key functions that will be a part of the Phase 1 project. This milestone deliverable should include: • Project overview, including a description of the product of the project

	• Goals of the project • High-level timeline • High-level scope definition (later to be superseded by the Requirements Document deliverable) • List of project deliverables • Deliverables delivery and payment schedule • List of exclusions from scope • Key project stakeholders • Roles and responsibilities • Assumptions • Constraints • Risks
Project Management Plan	The purpose of the Project Management Plan is to define the project organization, approach and timeline, work planning and controls, resource management, and communication plans. The Project Management Plan is approved by the District and is maintained throughout the life of the project. The Project Management Plan should be documented and include the following: • Detailed Project Plan • Risk and Issue Management Plan • Scope/Requirements Management Plan • Change Management Plan (outlining the change control process) • Quality Management Plan • Resource Management Plan • Configuration Management Plan • Communication Plan
Testing Strategy	The purpose of the Test Strategy Document is to provide a common understanding of the testing phases, testing documentation, roles and responsibilities, tools and accelerators from our Hybrid Agile methodology. Service Provider’s traditional testing approach takes a common tactic to documenting test cases regardless of the type of test. This provides a single source of truth for the

	data related to testing including defect tracking against original requirements. Testing types to be executed are: • Unit Testing – to be executed during Design and Build Phase • Integration Testing – to be executed during Integration Test Cycles • User Acceptance Testing – to be executed during User Acceptance Testing Cycles Sign-off requirements for each test phase will be documented and approved in the Testing Strategy Deliverable
User Story and Acceptance Criteria Document	Once the functional deep dives are completed in the Analyze Phase, the department-level process details and requirement information gathered will be analyzed and assembled into the User Story and Acceptance Criteria Document. The purpose of the User Story and Acceptance Criteria Document is to accurately define what is needed by the District from the solution, in detail. This document will be used by the development team to build the solution during the Design and Build Phase. Additionally, the User Story and Acceptance Criteria Document will be referenced extensively by the functional team during Design and Build sessions and during the Testing Phase to confirm that the solution being delivered meets the specifications of the District and the involved departments. User Story and Acceptance Criteria Document will include: • User Stories defined by each department or sub-department group • Each User Story will be linked to 1 or more Functional Requirement(s)/Acceptance Criteria • Unique IDs for each User Story and Functional Requirement/Acceptance Criteria for tracking purposes
Training Approach Document	The purpose of the Training Approach Document is to define the methodologies, documentation, tools, and anticipated training courses required to enable future end users to utilize and operate the system. This document will include: • Identification of key audiences and user groups

	- Learning objectives by user group/functions - Details on the training materials to be produced - An overview of the train the trainer methodology - Logistics requirements for Training (resources, rooms, and equipment) - High-Level training roll-out schedule - Training evaluation approach - Key success factors
Conversion & Integration Approach Document	The purpose of the Conversion and Integration Approach document is to define the processes, tools, and resources involved with Data Conversions and Integrations. This document will include: - Definition of key conversion activities - Conversion timeline - Object/Table-level conversion scope by application - Detailed RACI matrix for conversion activities - Definition of key integration activities - Integration timeline - Integration scope by application - Detailed RACI matrix for integration activities - List of assumptions and risks related to Conversions and Integration
Completion of Build and Solution Design Documents	When the Build of the solution is complete, the Solution Design Documents will be developed to provide information on critical design details captured throughout the Design and Build Phase mapped back to the original User Stories captured in the Requirements Document. Design and Build sessions with internal District employees (and external customers, if requested) are necessary to inform development of this document and the corresponding design decision points. Coordination with the District’s Web Team may be necessary to adhere to the District’s Web Design Guidelines and templates. The Solution Design Document will consist of: Detailed overview of all custom UI components (internal and external)

	• Extract of detailed design requirements and decisions captured during the Design and Build Phase mapped back to the District's User Stories
Functional Unit Testing Sign-Off	Functional Unit Testing will be performed by the Service Provider team throughout the Design and Build Phase to confirm that all individual software components are functioning as defined in the User Story and Acceptance Criteria Document, and to verify that functionality is ready for Integration Testing by the District. Additionally, Functional Unit Testing will enable the development of Integration Test scripts which will be loaded into the designated testing tool prior to the start of Integration Testing. Functional Unit Testing sign-off criteria will be defined in the Testing Strategy deliverable.
Systems Integration Testing & Sign-Off	Systems Integration Testing (SIT) will be managed by Service Provider but executed by testers identified by the District. The purpose of Integration Testing is for the District to confirm that the solution and its integrations are working properly, and that it has been built in accordance to the requirements defined in the Requirements Document. Integration Testing sign-off criteria will be jointly defined by the District and Service Provider in the Testing Strategy deliverable.
Final Solution User Acceptance Testing & Sign-Off	Final Solution User Acceptance Testing (UAT) will be managed and executed by the District, with support from Service Provider. The purpose of User Acceptance testing is for the District to validate all system operations and to verify that users can execute critical end-to-end business scenarios. The completion of Final Solution User Acceptance Testing indicates the District's approval of the solution built. User Acceptance Testing sign-off criteria will be jointly defined by the District and Service Provider in the Testing Strategy deliverable.
Deployment Checklist, Sign Off & First User Live	The purpose of the Deployment Checklist is to confirm that all components of the project are ready to be deployed. The checklist that is developed will provide the project team with a tool to validate successful deployment of the solution. Items to include but not limited to: • Completion of User Acceptance Testing • Adherence to the District's Change Control Process

	(outlined in Appendix E) • Provision Production Environment • Stage environment code back up • Configuration migration from Stage environment • Code base migration from Stage environment • Data migration status (by object) • Production environment smoke testing
Support Period Report	The purpose of the Support Period Report is to provide the metrics related to types of incidents being reported about the system by its users. This report will include a breakdown of incidents by priority, department, and time. In addition, the Service Provider agrees to follow the District's Change Control process outlined in Appendix E when deploying changes to Production.

Milestone Deliverable Acceptance Process
The District and Service Provider will follow the Deliverable Acceptance process outlined below for each of the milestone deliverables that are defined as part of this document and corresponding Payment Schedule.

The District will approve each milestone deliverable that conforms in all material respects with the expectations defined in Figure 2.C or as otherwise agreed in writing by the parties (including in mutually agreed deliverable acceptance criteria) (the "Specifications"). If the District does not accept the deliverable because it does not conform in all material respects with the Specifications, the District must reply to Service Provider with all deficiencies in writing, by no later than ten (10) business days after the request to sign-off a milestone deliverable has been delivered to the District. Such correspondence must include all the deficiencies preventing acceptance, with reference to the applicable Specifications (the "Deficiencies").

Service Provider will complete corrective actions for the milestone deliverable to conform in all material respects to the applicable Specifications. District will complete its review of the corrected milestone deliverable and notify Service Provider in writing of acceptance or rejection in accordance with the foregoing provision.

An approved Milestone Deliverable Acceptance Form (Refer to *Appendix C*), signed by both parties, must be submitted with each invoice; provided that approval of a milestone deliverable will be deemed given by District if District has not delivered to Service Provider a notice of Deficiencies for such milestone deliverable prior to the expiration of the period for District's review thereof as set forth in this Section, or if District uses the milestone deliverable in production (and in such case, the approved Milestone Deliverable Acceptance Form will not be required prior to invoicing).

To the extent that any milestone deliverable has been approved by District at any stage of Service Provider's performance under this agreement, Service Provider will be entitled to rely on such approval of that specific deliverable for purposes of all subsequent stages of Service Provider's performance under this agreement. The District agrees that, in the event an approved milestone deliverable differs from the Specifications for such milestone deliverable, the Specifications will be deemed modified to conform to such approved milestone deliverable.

3. Department and Process Scope

The services provided with this SOW will be focused on improving the account and contact management, case management, grants management, and permitting processes currently in place at the District as well as creating a new Knowledgebase to replace Poogle. The below table outlines the capabilities that will be in scope for implementation in Phase 1, the proposed application to support each capability, and the departments which will benefit by the capability. The specifics of the application scope, integration scope and conversion scope for existing District data will be discussed in more detail in Sections 4, 5, and 6.

Figure 3.A: Overview of Process Scope by Department and Application

Capability	System/ Application	Departments in Scope
Contact & Account Management	Salesforce.com Service Cloud	Parks and Reservations, Environmental, District Clerk, General Services, Marketing
Case Management	Salesforce.com Service Cloud	Parks and Reservations, Environmental, District Clerk, General Services, Marketing
Knowledgebase	Salesforce.com Knowledgebase	Parks and Reservations, Environmental, District Clerk, General Services, Marketing
Permitting	Salesforce.com Service Cloud, Conga	Environmental, Parks and Special Events
Venue Booking / Reservations	Salesforce.com Service Cloud	Parks and Special Events
Online Payments	Authorize.Net	Environmental, Parks and Special

		Events
Communications	Conga, Twilio	Parks and Reservations, Environmental, District Clerk, General Services
Grants Management	Salesforce.com Service Cloud	Grants Management

Contact & Account Management
Service Provider will be implementing Salesforce.com Service Cloud that will support the District's Contact and Account management processes. The proposed solution will replace the District's existing SAP CRM system. The new system will be accessible by all of the District's licensed users.

Case Management
Service Provider's proposed Salesforce.com solution will also be able to handle intake and creation of support cases. The Public will be able to create cases by calling the District or using the proposed self-service Portal on the District's website. The system will also enable service-related notification generation in the District's SAP EAM system if the case involves a maintenance request. District employees will be able to track the status of cases from Salesforce.com.

Knowledgebase
Service Provider will be replacing the District's Poogle application with a new Salesforce.com Knowledgebase solution which will be accessible by all District departments and employees. Additionally, approved knowledge articles can be exposed externally to the Public and District customers via custom VisualForce pages.

Permitting
Service Provider will streamline the Environmental and Parks & Special Events departments' permitting processes using Salesforce.com. It will provide the Public with a checklist of required documents for the permit that they are applying for. Should the detailed requirements identify the need for custom or dynamic templates, Conga will be used in tandem with Salesforce.com to support those requirements, as well as to generate relevant documents. Service Provider will create an online web Portal through which the Public will be able to request permits online and see venue availability. The Public will also see the list of forms required for the permit and be able download those forms from the District website. The online web Portal will also be accessible on mobile devices through responsive mobile-friendly webpages.

Venue Booking / Reservations
Service Provider will develop a venue booking and reservations solution using the Salesforce.com platform. The application will allow District employees to see available venues for events and reserve them from the system. The Public will also be able to view and reserve available venues through the web Portal. Service Provider will work with the District to understand the detailed requirements for the venue booking capability during the Analyze phase. Although Salesforce.com will be able to support

most reservations-related requirements, Service Provider may recommend an accelerator should the complexity of the requirements be high.

Online Payments

Service Providers will incorporate online Credit Card payments as part of the District's permitting processes. The decision to incorporate credit card payment functionality will be dependent on the District's ability to provide an existing PCI-compliant payment gateway with a certified bank integration. During the Analyze Phase, we will work with the District to assess if the existing credit card payment solution can be leveraged for the permitting solution, as well as the level of complexity involved. Salesforce.com will only be used to pass data into the payment gateway and to indicate whether (or not) the payment was executed successfully. Salesforce.com will not be used as an accounting or bookkeeping application or for financial reporting, nor will Salesforce.com directly integrate with the District's financial system. The payment gateway will act as the broker of payment information by passing payment data to the bank for processing, providing payment status updates to Salesforce.com, and posting successful payments in the District's financial system. This will allow for a single point of truth for all payment information for downstream systems.

Communication

Service Provider will be implementing communications capabilities as part of this contract. These include communications with the Public for case status updates, reservation confirmations, and other such tasks. While Salesforce.com can communicate with users using its basic email communication feature, Service Provider recommends using Twilio to support the District's communications requirements. Twilio supports more advanced email and text communication capabilities which may better and more easily support the District's requirements. There will be an additional charge associated for using Twilio.

Grants Management

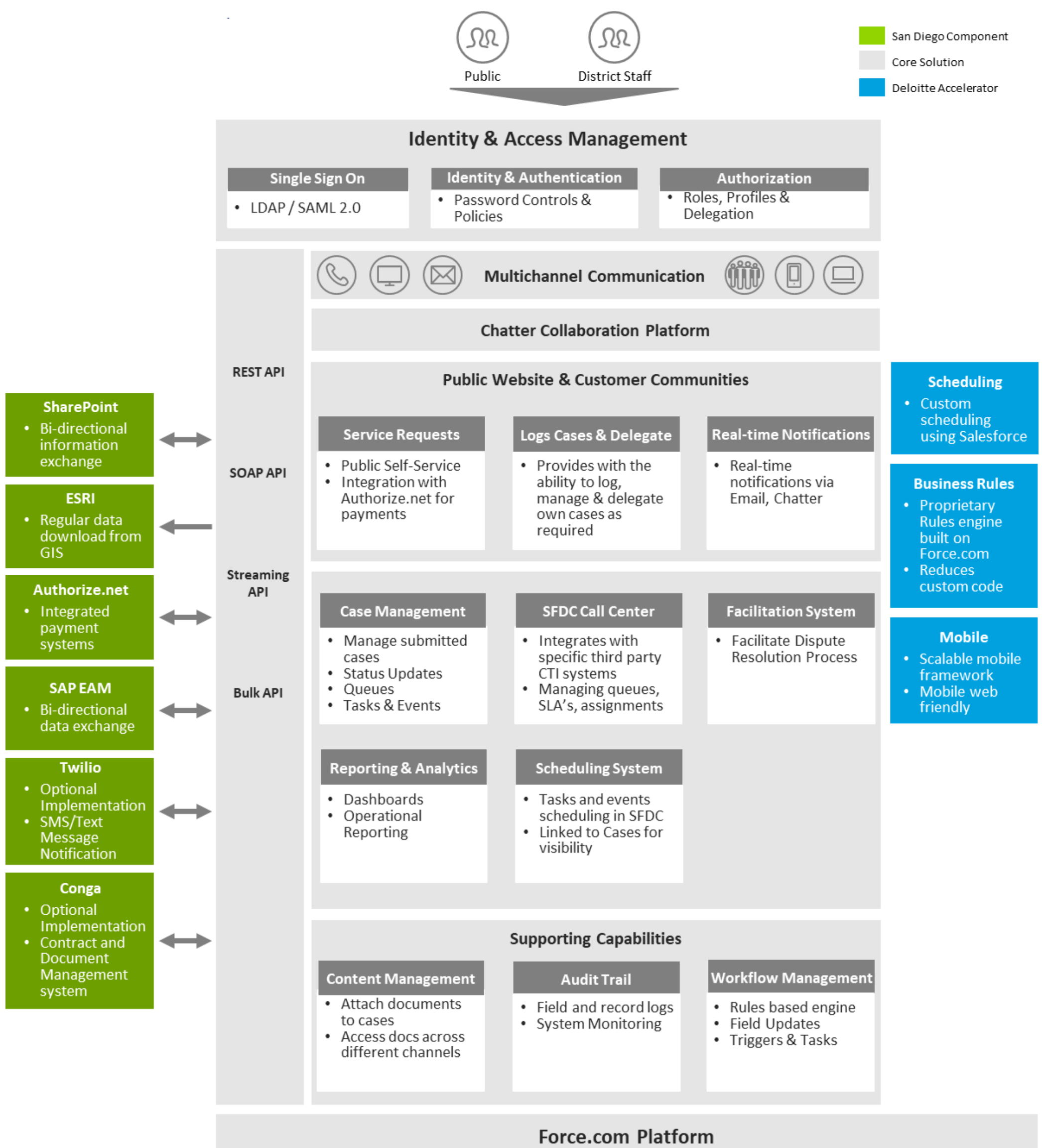
Service Provider will be implementing a grants management solution to support the tracking and management of grants and grant-funded projects. The grants management solution will be built on the Saleforce.com Service Cloud platform using a combination of standard and custom objects/tables. The solution will include project records, grant records, funder records, and inventory/equipment purchase records. Additionally, the solution will provide notifications to remind key stakeholders about upcoming reporting requirements and project end dates. The solution will not include any integrations, but will can support manual entry of key financial data points, such as remaining total budget amount, remaining grant award amount, total spend, etc.

4. Application Scope

Application Landscape

Service Provider will use Salesforce.com Service Cloud as the primary application to build the District's CRM implementation. More specifically, Salesforce.com's Government Cloud-based Service Cloud, which is a partitioned instance of Salesforce.com's multi-tenant public cloud infrastructure, specifically for use by U.S. federal, state and local government customers. Third-party applications providing additional features (outlined in Section 5 – Integration Scope) will be integrated with Salesforce.com by Service Provider and the District's existing vendors, further defined in the roles and responsibilities section below.
A high-level diagram of the application architecture is included below:

Figure 4.A: Solution Architecture



Applications to be Implemented
The Salesforce.com CRM application will be configured to enable the District to handle the processes highlighted in Table 4.B below. Additional processes may be identified during the Analyze Phase and may be brought into scope after assessing level of effort and by following the change control process outlined in *Section 12.*

Figure 4.B: Applications to be Implemented

Process	System/ Application
Account and Contact Management	The Account and Contact Management system currently supported by SAP CRM will be replaced by Salesforce.com Service Cloud.
Case Management	The Case Management process which is currently supported by SAP CRM and a variety of manual processes will be replaced by Salesforce.com Service Cloud.
Knowledgebase	Poogle, the District's existing Knowledgebase system, will be replaced by Salesforce.com Service Cloud's native Knowledgebase module.
Permitting	The in-scope permitting processes will be implemented primarily using Salesforce.com Service Cloud capabilities. However, if requirements call for custom or dynamic templates, a third-party application such as Conga may need to be procured and integrated to support them.
Park Reservations	The park availability check and reservations processes will be supported by a custom Salesforce.com Service Cloud application.
Online Payments	To support online payments for permitting and reservations processes, an integration will be developed with the District's existing, API-enabled payment gateway.
Communication	To support internal and external communication requirements, out-of-the-box Salesforce.com Service cloud capabilities will be configured. Should more advanced email templates or text message reminders be required, third-party applications such as Twilio and Conga may need to be procured and integrated to support them.
Grants Management	The grants management solution will be developed using out-of-the box Salesforce.com and up to 8 custom Salesforce objects.

Customizations Scope
Application customizations are more complex and take a significant amount of time to design, develop, test, and deliver.

The District agrees to the following limits to system customizations as part of this SOW:

Figure 4.C: System Customization Scope

Customization Type	Description	Max Limit
Email Templates	Email templates are customized communications templates used for internal and external email notifications, confirmations, reminders, or receipts.	30
VisualForce Pages	VisualForce pages are custom Salesforce.com pages which can be developed for internal or external facing data display, web-based entry forms, workflow pages, etc.	30
Customer Applications	Custom applications can be developed to support requirements or processes not supported by native Salesforce.com Service Cloud functionality	5

Applications with Functionality to be Retired

As Service Provider completes the implementation of the proposed solution and the system comes into use by the District, there will be several legacy systems that will have functionality retired. The anticipated systems impacted can be found in *Figure 4.D.* below. As a part of the retirement of certain functionality, the District will require conversion of certain data. Please refer to *Section 6 Conversion Scope* for more details. The below list is not an exhaustive or final list of systems with functionality to be retired but rather systems identified based on current requirements. This list may be expanded/contracted by following the change control process outlined in *Section 12.*

Figure 4.D: Systems with functionality to be Retired

System with Functionality to be Retired	Replacement System	Capability	Department
SAP CRM	Salesforce.com Service Cloud	Account and Contact Management Case Management	All
NetAdmin	Salesforce.com Service Cloud	Venue Booking	Parks and Reservations
DM5	SharePoint	Document Management	Parks and Reservations
Poogle	Salesforce.com Knowledgebase	Knowledgebase	District Clerk

5. Integration Scope

Service Provider understands that the District has several systems that need to be integrated and can leverage Salesforce.com APIs to create, retrieve, update, or delete records in Force.com from any external system that supports SOAP-based Web services, such as Java, .NET, or PHP client applications. Service Provider will be integrating the new Salesforce.com CRM system with the District's systems listed in the table below (Figure 5.A) as part of this SOW:

Figure 5.A: Integration Systems

System	Application Details	Integration Details
SharePoint	SharePoint serves as the District's primary content management system going forward. It will store documents and images generated or saved as part of the processes in-scope for Phase 1	Bidirectional API-based interface. Salesforce.com will store and retrieve files saved in SharePoint.
ESRI	ESRI is the primary source for the District's geolocation-based data, managed by the District's GIS team.	Unidirectional API-based interface. Salesforce.com will send location information to pull geospatial data from existing District GIS layers using existing geo-processing services. This contract will not support the updating of GIS layers from Salesforce.com. Google Maps will be used to display case data on District webpage.
Active Directory (SSO)	To support single sign-on (SSO), the District's existing SSO will be	Unidirectional API-based interface. AD data will be

	integrated so that user Active Directory data is used for user identification and authentication purposes.	passed into Salesforce.com to support single sign-on.
Authorize.Net	Authorize.net serves as the District's current credit card payment processor. Salesforce.com will pass permit payment data into Authorize.net's turn-key PCI-compliant payment gateway to support online payments.	Bidirectional API-based interface. Salesforce.com will pass a unique payment identifier and the payment amount into the payment gateway. The payment gateway will send Salesforce.com a payment success or failure notification to complete the payment transaction for the end user.
SAP EAM	SAP EAM serves as the District's primary asset management solution and will be integrated to support complaint-driven work order generation processes.	Bidirectional API-based interface. Salesforce.com will pass complaint data generated from the online self-service Portal or manually by District users into SAP EAM to create notifications. Once a work order has been manually created and completed by General Services, a notification will be sent back to Salesforce.com to update the case status.

LDAP Integration

Service Provider will implement the solution by integrating with the District's existing LDAP infrastructure. Salesforce.com provides ability to create users declaratively using a browser-based console, bulk-load new user data, use SAML-based automatic provisioning, or API calls that handle user registrations in real time. Delegated authentication single sign-on enables the District to integrate the system with LDAP (Lightweight Directory Access Protocol) service.

Salesforce.com solutions conform to the LDAP standards by delegated authentication processes against internal LDAP sources.

Delegated authentication single sign-on enables the District to integrate Salesforce.com with an authentication method that the District chooses. This enables the District to integrate authentication with the District's LDAP (Lightweight Directory Access Protocol) server or perform single sign-on by authenticating using a token instead of a password. The District manages delegated authentication at the profile level, allowing some users to use delegated authentication, while other users continue to use their Salesforce.com-managed password. Delegated authentication is set by profile, not organization wide and is a feature that can be enabled through Salesforce.com.

6. Conversion Scope

Service Provider will be responsible for managing the data conversion activities from legacy systems listed in the Conversion table below (Figure 6.A). Service Provider will be responsible for transforming the data and loading the data into the Salesforce.com solution. Service Provider will provide the process for data reconciliation of source and target systems.

The District is wholly responsible for data cleansing activities within the identified source systems but may request Service Provider to assist on a time and materials basis (in accordance with a mutually agreed and executed Change Order). The District is wholly responsible for performing the data extraction and providing Service Provider with a copy of the source system databases for all data sets to be converted. The District is wholly responsible for validating converted data and reconciliation counts. If there are numerous source systems with overlapping data sets, the District will identify and provide a single master data set to be converted to the CRM solution.

Figure 6.A: Data Conversion Scope

Data Source	Description of Data	Projected Volume
SAP CRM	Customer information (Contacts, Accounts, Addresses and TBD) – Need to determine if cases or activities are required	5,000-10,000 records (total)
Poogle	Previously used as Knowledgebase	5-10 pages in spreadsheet
NetAdmin	Previously used for venue management (customers, vendors, location, cost, event details, event documents, etc.)	6,000-7,000 events
SQL Server 2008	All documents previously stored in DM5 were migrated to SQL Server for storage. These documents will be migrated to SharePoint so that SharePoint becomes primary content management system	800 documents (PDFs)

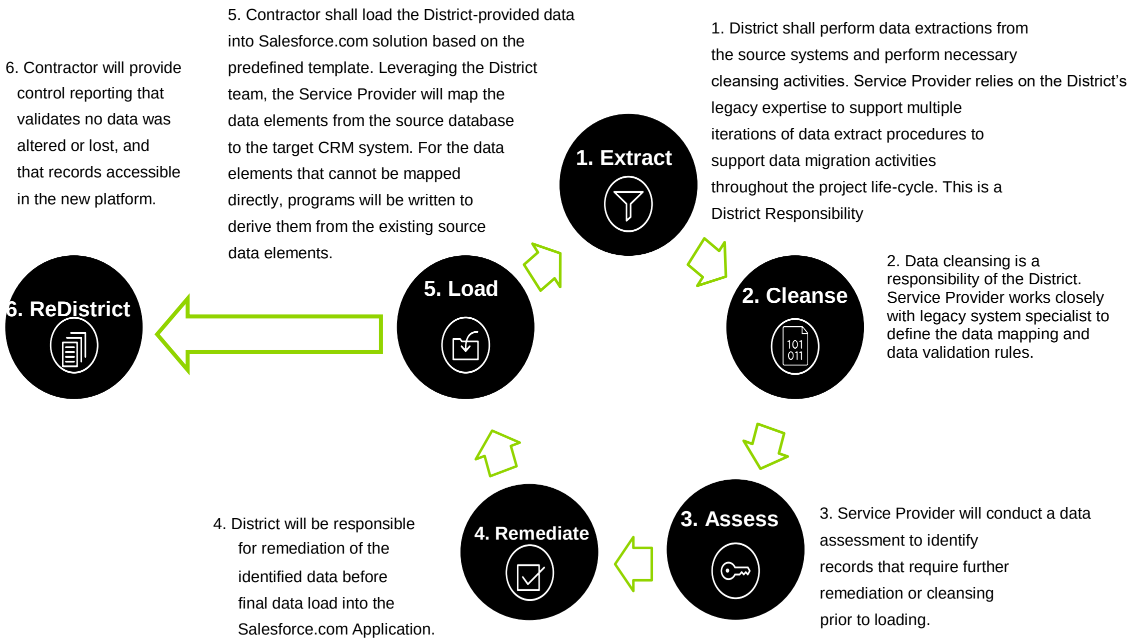
Service Provider will also support the conversion of up to 10 flat files or spreadsheets that support the business processes in-scope of this contract (including Grants Management). To align with best practices, data will only be converted into the new system to the extent that the data fits into the data structure of the new Salesforce.com system. There will be no effort made to extend the data structure to hold data for archival purposes.

Data Conversion Methodology

During the data migration process, Service Provider will work with the key District stakeholders to detail the conversion requirements and define a Data Conversion Plan to successfully migrate legacy data into the Salesforce.com solution.

The following diagram illustrates the activities performed to complete data conversion to the new system as well as outlining the primary responsibilities for conversion:

Figure 6.B: Data Conversion Methodology



7. Reports Scope

Salesforce.com's robust out-of-the-box Reporting and Dashboards will be utilized to fulfill reporting requirements. These tools are included with the licensing of the Salesforce.com solution. Salesforce.com offers a powerful suite of analytics and reporting tools to help the District view and analyze the District's data. To help the District monitor the District's organization, Salesforce.com offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. Users can also create new custom reports to access exactly the information they need.
As part of this contract, the Service Provider will develop the following number of reports by type:

Figure 7.A: Types of Reports

Report Type	Number	Description
Standard Reports	30	Reports or Dashboards that can be built from the Salesforce.com Report Builder using data that is sourced from Salesforce.com. These reports or dashboards require no customization, but basic configuration in the Salesforce.com Report Builder.
Custom	5	Transactional reports that require export format of PDF and MS Word using data that is sourced from Salesforce.com. Custom reports do not include Trending, Analytical, and/or non-transaction reports as

		these report types are not supported by the Force.com platform and would require a specialize reporting and analytics application.

8. Testing Scope

In order to validate the solution meets the District's requirements, Service Provider will work with the District team members to develop mutually agreed-upon test plans, "entry criteria" and "exit criteria" that will form the basis of test "acceptance criteria" and "sign-off" procedures. Entry criteria are defined to help readiness for a particular test phase. Exit criteria validate the desired results of each test cycle.

To support test planning, the requirements gathered during the Analyze Phase will be mapped to business processes using User Stories, and further refined into detailed Acceptance Criteria. Using these Users Stories and Acceptance Criteria, the Service Provider will work with the District to create detailed test scenarios to define expected, measurable outcomes as the solution is being built.

Service Provider's design and build demo sessions will provide a cycle of "Review and Acceptance" to elicit early feedback and document the changes required prior to the start of System Integration Testing. This helps cut down on testing efforts in the Test phase.

Overall testing activities consist of the following:

- **Unit Testing** is the first testing activity carried out as part of the Design and Build phase and is the process of testing an individual requirement. Service Provider will be responsible for unit testing the solution prior to beginning the Test Phase.

- **Test Scenarios** are driven by User Stories and Acceptance Criteria and will include a combination of data-based and user-based scenarios which will be executed in an iterative manner. These test scenarios comprehensibly cover business process flows and will test all integrations.

- **Test Scripts** break down the Test Scenarios into step by step system instructions and are mapped back to User Stories and Acceptance Criteria for traceability. This enables District testers to easily execute Test Scenarios and to validate the solution meets all system requirements.

- **Integration Testing (INT)** occurs during the first part of the Test Phase. During System Integration Testing, District testers will execute Test Scripts that specifically validate that the system is performing as expected across all integration points. Additionally, as mentioned above, Test Scripts will be mapped to each signed-off system requirement to ensure complete coverage. Service Provider will be responsible for fixing defects identified by the District throughout System Integration Testing.

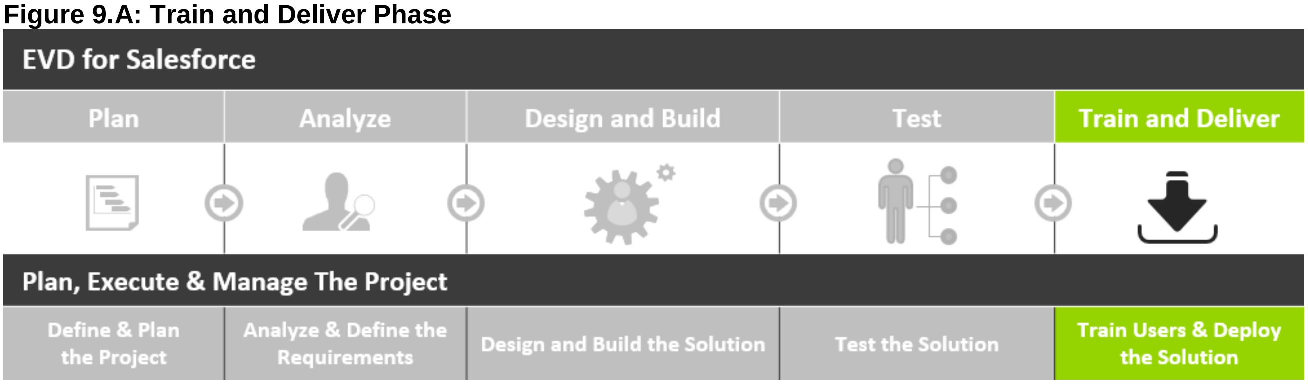
- **User Acceptance Testing (UAT)** occurs immediately after System Integration Testing has concluded. During User Acceptance Testing, the District will define and run longer end-to-end Test Scenarios to further validate the system meets system requirements and user needs. Service Provider will again be responsible for fixing defects identified during this test

- **Testing Sign-Off** requirements and procedures will be formalized as part of the testing strategy definition, developed jointly between the Service Provider and the District. The outcome will be documented as part of the Testing Strategy Deliverable due at the end of the Plan Phase.

9. Training Scope

Training Phase

Figure 9.A: Train and Deliver Phase



Service Provider understands that to implement the District's CRM solution and drive user adoption, a training strategy is required to transfer practical knowledge to the roughly 100 staff. Service Provider shall use the Train-the-Trainer Approach (described below), where Service Provider will train up to 10, District-identified trainers.
Service Provider and District will work together to plan and schedule the final training program to transfer practical knowledge and skills.

Logistics

To support training efforts, the District will be responsible for:

- Securing training facilities/classrooms with the capacity and capabilities (i.e. internet access, projector, printer, etc.) to support District training needs
- Securing computers that meet Salesforce.com's minimum performance and browser requirements (Service Provider recommends meeting Salesforce.com's "recommended" specifications)
- Ensuring District trainers and end-users are available during the Training Phase

The Service Provider will be responsible for:

- Coordinating support from appropriate Service Provider technical and functional experts
- Developing training materials for District trainers and staff

Train-the-Trainer Training Approach

Service Provider understands that as business departments continue to operate, they will need to periodically conduct training for their own users as they hire new employees and transition employees from one role to another. To that extent, Service Provider supports having a robust train-the-trainer training plan to prepare users identified by the District with the knowledge and expertise to train other District employees. In addition to

the train-the-trainer training that will be conducted, Service Provider will also provide the District with electronic and hard copies of the training materials and job aids to help the District's trainers with conducting future trainings themselves.
Service Provider will facilitate train-the-trainer training for up to 10 staff, including super users, through instructor-led-training (sample curriculum outlined below in Figure 9.B).
District Training staff will then deliver training to end users by department or functional user group with the support of Service Provider.
Super-Users will attend and support their department's end user training sessions to reinforce the training, support training delivery, and assist end users in using the system.

Figure 9.B: Sample Train-the-Trainer Training Curriculum

User Group	Proposed Courses	Total Training Duration
District Trainers	Salesforce.com Basic Navigation Service Requests Reports Knowledge Base Advanced Knowledge Base Dashboards Scripts, Troubleshooting, and Help Guides	Up to 12 hours

Course Name	Modules	Training Hours	Format
Salesforce.com Basic Navigation	Access and login Navigating the system System functionality overview System analysis capabilities overview	Up to 1 hour	Instructor-Led Training
Service Requests	Creating, modifying and cancelling service requests Workflows (accepting and routing service requests) Querying service request statuses Resolving service requests	Up to 4 hours	Instructor-Led Training
Reports	Prebuilt reports Modifying queries and reports Creating queries and reports	Up to 2 hours	Instructor-Led Training
Knowledge Base	Accessing the knowledge base	Up to 2 hours	Instructor-Led Training

	Navigating the knowledge base		
Advanced Knowledge Base	Knowledge base development Knowledge base maintenance	Up to 1 hour	Instructor-Led Training
Dashboards	Dashboard overview Customizing your dashboard	Up to 1 hour	Instructor-Led Training
Scripts, Troubleshooting and Help Guides	Accessing scripts Using troubleshooting and help guides	Up to 1 hour	Instructor-Led Training

Other Training Considerations

Training will be conducted in a UAT or Production (as appropriate) environment using District data, configuration settings, and terminology. The Service Provider will work with District staff, District trainers, and District super users to validate the training scenarios to be used for training delivery, demonstrations, practice, and training evaluation.

District staff and supervisors will need to work together to ensure training sessions are scheduled within the Training Phase, to ensure it is as close to system Go-Live as possible to minimize knowledge loss between training and system use.

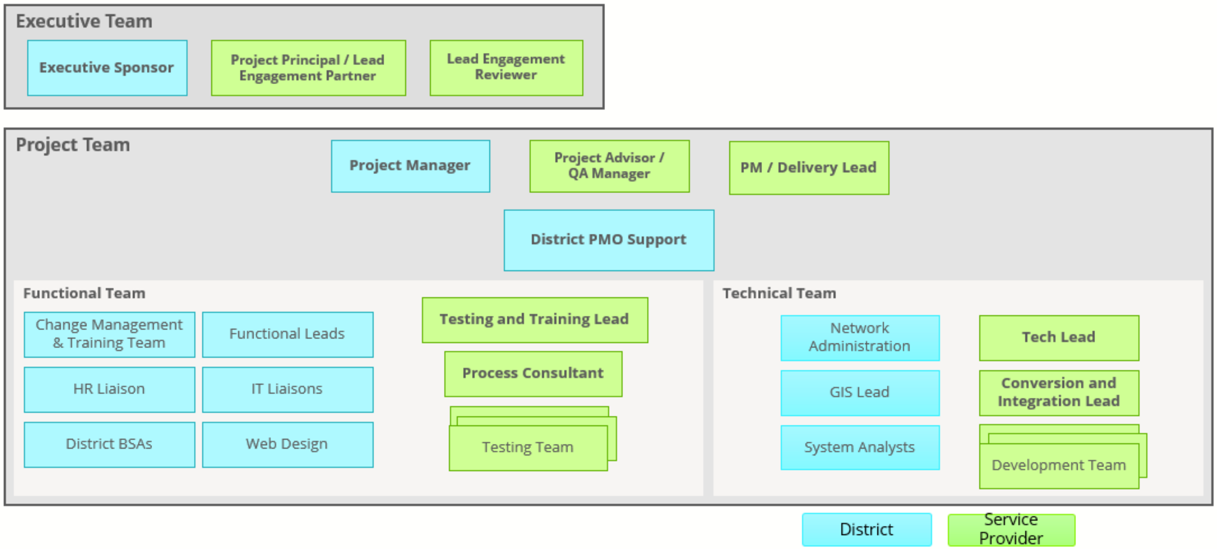
If after training, the Go-Live date is significantly delayed by more than 30 days and it is determined to be directly caused by Service Provider's sole fault or actions, the Service Provider will coordinate abbreviated refresher training to reaffirm core concepts and repeat course evaluations to confirm staff have retained the key knowledge, skills, and abilities they need to effectively use the new system.

10. Project Org Chart

This section describes the organizational structure of the project team and identifies key roles along with their responsibilities throughout the project. Through this structure, the Service Provider and District will establish the project processes and key decision makers that will facilitate rapid decision making and promote clear communication channels. Service Provider and District will jointly promote a clear and unified direction across the project.

The figure below depicts the organization structure for the proposed team to deliver the CRM project.

Figure 10.A: The CRM Project Organizational Chart



Each team is held accountable to complete their respective deliverables and activities to achieve the overall objectives of the project.

Figure 10.B: The CRM Project Team Responsibilities

Team	Responsibilities
Executive Team	The executive team is involved in monitoring project progress and addressing implementation, resource, change management, and risk issues.
Project Management Team	The Project Management team will utilize best practices and standards to develop the approach and provide the assets for effective project management throughout the engagement. The Project Management Team is ultimately responsible for the day to day execution of the project.
Functional Team	**Business Analysis** – Facilitate the requirements gathering and management process, conduct the business event analysis, perform business process re-engineering and design, define process controls and key procedures, and support the package configuration. **User Experience** – Conducts user research and design sessions to confirm the end solution meets the Districts requirements as set forth herein. **Quality Assurance** – Executes the structured evaluation of the developed solution, including functional and technical capabilities against the agreed upon requirements and design. Facilitates performance testing and user acceptance testing prior to the go/no-go decision. **Org Change and Training** – Addresses adoption and sustainability of the change initiatives and effort. Works to develop an integrated approach to communications, perform stakeholder engagement, conduct business preparation activities, prepare and deliver training, and support transition.

Technical Team	**Application Development Team** – Perform solution technical design, complete technical development and unit testing of the solution's components, including Salesforce.com and other boundary systems with which Salesforce.com will leverage and be integrated. **Solution Architecture & Deployment** – Creates enterprise architecture to match business need to technology capabilities and constraints. Coordinates and executes the deployment activities to smoothly transition to the new solution, including go/no go readiness and post-production stabilization. **Integration and Conversions Team** – Responsible for the design, development, and unit testing of integrations and conversions part of the SOW.

Service Provider Roles and Responsibilities

Figure 10.C: Service Provider Project Member Responsibilities

Project Role	Team	Responsibility
Project Principal	Executive Team	• Overall point of contact for the project • Responsible for the successful completion and delivery of the project • Lead Change Order discussions with the District • Provide guidance and direction to the Project Manager • Attend Executive Team meetings • Provides leadership and direction across the project teams • Develops the approach and provides the assets for effective Project Management
Project Manager / Delivery Lead	Project Management	• Overall project manager responsible for day to day project execution • Oversee project work streams, quality, financials, staffing, methods, standards and guidelines for the project. • Work closely with the stream leads to confirm that the solution will meet business and technical requirements. • Manage project issues, risks, deliverable quality, status reporting, and overall communications. • Attend process reviews, engagement reviews, and senior management reviews for the

		various project work streams.
Testing and Training Lead	Functional	• Develops training strategy and plan • Creates training curriculum and materials • Facilitates Train-the-Trainer sessions
Process Consultant	Functional	• Facilitates the requirements gathering and management process • Conducts the business requirement analysis • Performs business process re-engineering and design • Defines process controls and key procedures • Supports solution configuration
Conversion and Integration Lead	Technical	• Develops the solution for integrating the application to the boundary and corporate systems • Develops work assignments for the integration team • Monitors delivery on time and with high quality • Establishes integration standards and transaction protocols for consistency and reusability
Tech Lead	Technical	• Crafts the overall solution architecture • Oversees and provides guidance to the functional and technical teams on the architectural elements of the solution throughout project life cycle • Develops the deployment and cutover plan and oversees execution of the deployment plan • Leads execution of cutover and solution deployment

11. Assumptions

Over the course of this project, Service Provider will assume certain working assumptions which it will employ for all decision making. The assumptions for the project are listed below:

General Assumptions

Figure 11.A: General Assumptions

ID	Assumption
1	The Service Provider team will work onsite at District offices and remotely at Service Provider offices. When working at District offices the District will provide a reasonable amount of meeting space, conference rooms and workspaces for the Service Provider team to work effectively.
2	The District will provide access to all stakeholders in a timeframe supportive of the project plan and deliverable timeframes for subject matter input, decisions and clarifications.
3	The District will facilitate all communications with their existing system vendors regarding integration and conversion. This includes issue resolution and defect and integration aspects that need to be handled or escalated to facilitate sprint, testing, or deployment timelines.
4	The four system environments – Development/configuration (DEV), Testing (TEST), User Acceptance/Training (UAT), and Production (PROD) are included as a part of the license agreement between the District and Salesforce.com. Depending on data conversion requirements this may require additional Full Scale DB environments at additional cost to ensure testing accurately reflects production go live realities.
5	Backup and storage for the cloud hosted environment is provided as a part of the license agreement between the District and Salesforce.com.
6	Planning and execution of User Acceptance Testing (UAT) is the responsibility of the District. Service Provider will support the District in the UAT process, but execution will be the responsibility of the District.
7	Modification to the schedule resulting from delays in business decisions or reasonable availability of District staff may impact the proposed and planned timeline, ability to complete Deliverables, and fees proposed herein.
8	Service Provider and the District will work together, upon establishing a firm start date for the project, to establish specific dates for activities, deliverables, and milestones, including the go-live date; additionally, items to be considered for accommodation will include District holidays, District alternate work week schedule, District resource availability, etc.
9	The District will provide Service Provider the required access privileges such as logins and password to all District systems that will be converted from and integrated to. Access shall be provided in a timely and efficient manner within client security protocols. Delays in technical team access can delay overall timelines in critical phases so ensuring an efficient process for registration and access changes is key.
10	Project will receive support of District leadership through the life of the Project
11	The Project will receive required funding from the District Leadership Team
12	There could be business process changes as a result of the Project
13	The software identified for the Project will work as specified by the software vendor
14	Service Provider will not be building out new GIS Services for the District. Contractor will require the District's support in providing any GIS services that may be required for the project.

15	District is responsible for managing all activities related to the retirement of their legacy applications and/or functionality.

Application, Integration and Conversion Assumptions

Figure 11.B: Application, Integration and Conversion Assumptions

ID	Assumption
1	Service Provider will develop the required interfaces as outlined in *Section 5* of this SOW. The District will be responsible for providing the corresponding interface functionality from the incumbent District applications. The list of in-scope integrations is highlighted in *Section 5* of this document.
2	Conversion of historical data is limited to the data sources listed in *Figure 6.A* of this document. Changes to this list (addition or subtractions) will be handled via the Change Control process.
3	Service Provider will be responsible for managing the data conversion activities from legacy systems highlighted from the sources listed in *Section 6* of this document. The Extract and Transform aspects of the technical build will be executed by the District resources while the Load technical aspects will be executed by the Service Provider team.
4	The District will provide system access such as logins, passwords, data models, documentation, and data use cases for all source systems as needed.
5	The District will also coordinate access to District Vendors currently responsible for maintaining legacy systems. The District is responsible for procuring hours needed for vendors to support the data conversion activities from the legacy system and facilitation and overseeing their activities per the project schedule.
6	District Technology resources or Vendor resources will be available and scheduled in a way to support design conversations needed to support conversion or integration designs. Technical resources with contextual knowledge of the existing systems are a key success factor to these technical build items.
7	The District will be responsible for cleansing legacy data where needed but can engage Service Provider on a time and materials basis to assist in the effort. This request needs to be done in the Planning phase at the latest as late initiation of this task is logistically complex and cost prohibitive.
8	System Technical limitations or restrictions encountered causing additional customization on the new development (Conversion or Integration Build) will be handled via the Change Control process to accommodate for “work around” fix logic. This could include but would not be limited to Integration support tech, Batch Volume limitations, performance limitations, lack of existing error handling protocols.
9	A maximum of 30 custom forms shall be developed for Phase 1. Custom forms are PDF and/or MS Word forms generated within SFDC with merge field values sourced from Salesforce.com records. This could include letters/communications to the Public, templates requiring Public input, permits, etc.
10	The District will be responsible for the changes to their native web page

	resulting from self-service portal (i.e. layout and design updates, removal of forms and documents no longer required, etc.)
11	The District's Payment Gateway will integrate with Salesforce.com, the District's credit card processing bank, and the District's accounting system for payment posting.

Resource Assumptions

Figure 11.C: Resource Assumptions

ID	Assumption
1	The District will make reasonable efforts to identify District staff who have the necessary skills, time availability, program impact and success criteria alignment, and knowledge to effectively execute upon the responsibilities outlined herein or alternatively agreed upon by the District and Service Provider.
2	Agency representatives assigned to the project by the District will be empowered and have the necessary authority to make decisions, when requested, in a timely manner so as to not delay project activities proposed herein.
3	The District will coordinate with the current application support vendor(s) to participate throughout the project to support design, development, testing, and deployment activities on and for the legacy, existing, and 3rd party platforms per the project schedule. Examples of the effort that may be required include configuration/customization on the legacy platform, and exchange and integration of data. On many vendor solutions Service Provider can assist on a time and materials engagement basis if requested early enough (planning) in the program. Custom or niche vendor solutions may require direct negotiation with the Vendor or their preferred Integrator partners.
4	District staff assigned to the Project will be available as needed based on the project schedule to be defined in detail at the onset of the project. Service Provider and the program management team will document and raise any staffing or knowledge needs as part of the Standard Program Management (Risk, Action, Issue, Decision) RAID logs to document impacts to the program driven by resource availability
5	Service Provider will provide adequate resources to accomplish responsibilities identified as Service Provider's responsibilities. It will be the responsibility of Service Provider to train and transfer past knowledge to any Service Provider resources that are added to the project, post kickoff.
6	If any Service Provider resource needs named access to District systems, Service Provider will comply with District Information Security Requirements including each Service Provider resource signing a Third Party Agreement.

Training Assumptions

Figure 11.D: Training Assumptions

ID	Assumption
1	The project will leverage the train-the-training (TTT) approach to training end-users and Service Provider will be responsible for training the District trainers

	who will deliver end-user training (with support from the Service Provider).
2	The District will provide up to 10 in house trainers for knowledge transfer and TTT activities. Service Provider's staffing and deployment plans are based upon a train-the-trainer model leveraging these 10 resources.
3	Training audience for Instructor Led Training (ILT) is up to 100 end users in order to meet training timeline. Any significant deviation to this count would be handled via the Change Control process.
4	The District will be responsible for all training logistics and coordination, such as identification and preparation of classroom facilities, hardcopy of training materials, scheduling end-users into classes, tracking and monitoring attendance, and any training related communications with end-users.
5	Training facilities and equipment, including training rooms, hardware, network access, audio-visual equipment, and classroom supplies will be provided by the District in accordance with the project timeline and milestones.
6	Training logistics and related compliance activities, inclusive of enrollment/registration, attendance tracking, classroom set-up, material reproduction and distribution will be the responsibility of District resources.
7	Service Provider will provide resources with prior experience in curriculum development and training delivery to deliver all Train the Trainer and to support the District resources in all in-person end-user training.

12. Change Control – Scope Change Control Process

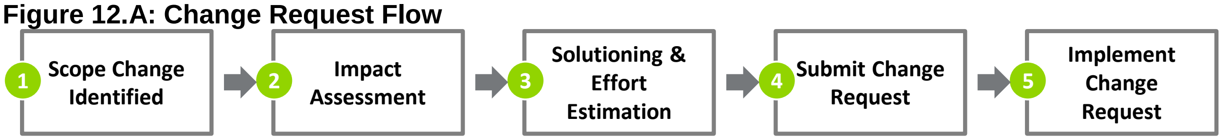
Changes in scope must be addressed with a clearly defined change control process that assesses and documents the impact of the change in scope and enables informed decision making. Our Scope Change Control Process is designed to identify, document, track and address issues that impact cost, timelines and service delivery and changes can be initiated by the project manager, stakeholders or any member of the project team.

Based on past experience managing similar projects to the District's CRM, Service Provider will define a structured approach to decision making of changes in scope by establishing a Change Control Committee (CCC). The CCC will collaborate with project leadership from the District and Service Provider teams to review scope change requests, approver deny scope change requests and identify needed escalation as defined in the plan. The CCC will review and approve or reject proposed scope improvements and enhancements.

Scope Change Requests

Service Provider and the District can manage the scope of the project and control the extent of scope changes. To help control scope, the project will define a scope change process that is similar to the process flow below:

Figure 12.A: Change Request Flow



Scope changes may not require any additional effort or even require less effort than initially planned, but these requests will follow the same scope control process in order to ensure that the District and Service Provider both have a clear understanding the most recent state of the solution requirements. Any scope change request will require the formal submission of the Scope Change Order Form mentioned in *Appendix D.*

ATTACHMENT B
COMPENSATION AND INVOICING

San Diego Unified Port District

Payments will be made following the successful completion and acceptance of each deliverable. Payments are based on a fixed price which is tied to the completion of key deliverables of each project phase.

Figure 13.A: Deliverables and Payments Schedule

Milestone Deliverable Name	Phase	Anticipated Completion Date	Payment %/ Cumulative %	Payment Amount
Project Scope Document	Initiate (Plan)	June 14, 2019	5%	$75,000
Project Management Plan	Initiate (Plan)	June 14, 2019	5%	$75,000
Testing Strategy	Initiate (Analyze)	July 19, 2019	5%	$75,000
User Story and Acceptance Criteria Document	Planning (Analyze)	July 19, 2019	5%	$75,000
Training Approach Document	Planning (Analyze)	July 19, 2019	5%	$75,000
Conversion & Integration Approach Document	Planning (Analyze)	July 19, 2019	5%	$75,000
Completion of Build and the Solution Design Documents	Execution (Design & Build)	August 30, 2019	15%	$225,000
Functional Unit Testing Sign-Off	Execution (Design & Build)	August 30, 2019	15%	$225,000
Integration Testing & Sign-Off	Execution (Test)	October 11, 2019	15%	$225,000
Final Solution User Acceptance Testing & Sign-Off	Execution (Test)	November 1, 2019	15%	$225,000
Deployment Checklist, Sign Off & First User Live	Execution (Test)	TBD – Based on Holiday Schedule	5%	$75,000
Support Period Report	Close Out (Deliver)	TBD – Based on Holiday Schedule	5%	$75,000
Total:				$1,500,000

APPENDIX

Appendix A: Requirements

Below are the baseline system requirements the District provided the Service Provider prior to the Analyze Phase. These requirements are considered valid and will only be superseded by the approved User Story and Acceptance Criteria Document deliverable due at the end of the Analyze Phase.

1. Customer Service Request Management Requirements

No.	Category	Requirement	Business Rules	System Capability	Comments
1.01	Request Management	The system provides the ability for a user to create an account with password.		OOTB Salesforce – User Mgmt	
1.02	Request Management	The System provides the administrator ability to create role based user accounts		OOTB Salesforce – User Mgmt	
1.03	Request Management	The system provides the ability for the District user / customer to select the service request (business activity) type from a drop-down list or auto fill.		OOTB Salesforce – Case Mgmt	
1.04	Request Management	The system provides a system generated unique service / case number (identifier) for each service request that is created.		OOTB Salesforce – Case Mgmt	
1.05	Request Management	The system provides a unique identifier for each service / case request beginning with an administrator assigned number i.e. with the year.		Custom Numbering Sequence	Deloitte does not recommend custom numbering sequence
1.06	Request Management	The system provides a status field that includes, but is not limited to: open, in progress, suspended, field verification, on hold, complete, escalated, or other.		OOTB Salesforce – Case Mgmt	

No.	Category	Requirement	Business Rules	System Capability	Comments
1.07	Request Management	The system allows the status field to be automatically updated when certain workflow items are completed.		OOTB Salesforce – Case Mgmt; Workflow	
1.08	Request Management	The system provides the ability to link forms (such as PDF) and other documents (e.g., pictures) to requests.		OOTB Salesforce - Attachments	
1.09	Request Management	The system displays whether or not there is an attachment (at intake, in work queue, and query).		OOTB Salesforce – Case Mgmt; Attachments	
1.10	Request Management	The system provides the ability for requestors to submit requests anonymously based on request type. Internal or external facing		OOTB Salesforce – Use generic user for external requests	
1.11	Request Management	The system allows the entry of multiple requests from a single call without reentering profile data.		OOTB Salesforce - API	
1.12	Request Management	The system provides the ability to auto-populate fields based on previous calls or other known data.		OOTB Salesforce – Case Mgmt	
1.13	Request Management	The system provides the ability for District customers / users to enter a service request as a predefined service area (e.g., block, address range, grid) with multiple instances.		OOTB Salesforce – Case Mgmt PLUS Address Validation Tool Integration	Deloitte recommends address validation; Smarty Streets was used at City of San Diego
1.14	Request Management	The system provides the ability for a service		OOTB Salesforce	

No.	Category	Requirement	Business Rules	System Capability	Comments
		request type field to allow distinction between initial or follow-up inquiry.		– Case Mgmt	
1.15	Request Management	The system provides the ability to capture different types of intake data, including but not limited to: date, requestor profile data, issue type, issue description, time of day problem occurred, safety concern, location, etc.		OOTB Salesforce – Case Mgmt and Fields	
1.16	Request Management	The system provides the ability to force the required entry of fields based on service request type.		OOTB Salesforce – Case Mgmt and Fields	
1.17	Request Management	The system provides the ability for a user to see business rules, e.g. amount of time required to fulfill request, for each service request type.		SLA Setup / TAT Reports for completed requests.	Assuming this is SLA related
1.18	Request Management	The system provides the ability to capture the asset linkage data and inventory.		Need Asset Mgmt	Asset Mgmt is not part of Phase 1
1.19	Request Management	The system provides hot keys for frequently used functions.		Custom solution required	Deloitte does not recommend hot keys; Browser hotkeys can interfere with custom hot keys
1.20	Request Management	The system provides hot keys for frequently		Duplicate of above	

No.	Category	Requirement	Business Rules	System Capability	Comments
		used functions.			
1.21	Request Management	The system provides the ability for District users to set up appointments via a calendaring feature/Integration with MS outlook.		Custom appointment solution will be needed; Custom Outlook calendar invite solution will be needed.	
1.22	Request Management	The system provides a template for "actions to be taken" field(s) to provide for complete documentation of the system request.		OOTB Salesforce – Case Mgmt and Fields	
1.23	Request Management	The system provides the ability to allow entry for multiple address descriptions for the same location per service request, each able to be assigned a type code (e.g., reporting, mailing, problem location, vanity address, etc.), which can be verified against the District's GIS system, utilizing the GIS layer appropriate to the type of service request.		OOTB Salesforce – Case Mgmt and Fields PLUS Custom GIS Integration	Deloitte recommends minimizing the use of multiple address on single request; GIS validation will be part of custom GIS integration
1.24	Request Management	The system provides the ability to display existing open service requests when the District user enters an address and, should the requestor be calling about an existing request, allow that information to be added		Use solution for requirement 1.31 to track cases related to same issue	

No.	Category	Requirement	Business Rules	System Capability	Comments
		to the original ticket so that a count of callers on the same request can be maintained.			
1.25	Request Management	The system provides the ability to display recently closed (and transferred) service requests when the agent enters a name, phone, number, email, address.		OOTB Salesforce - Account and Contact Lookup with Related Cases	
1.26	Request Management	The system provides the ability to display complete call history when the agent enters a name, phone, number, email address, address.		OOTB Salesforce - Account and Contact Lookup with Related Activities	
1.27	Request Management	The system provides the ability to add additional information regarding the exact location of the service request issue (e.g., actual location of meter, sprinkler problem or downed tree).		OOTB Salesforce – Case Mgmt and Fields	Add “Problem Location Description” field to Case
1.28	Request Management	The system provides the ability to add/change information to the intake form at a later date (e.g., customer calls back or after field verification).		OOTB Salesforce – Case Mgmt	
1.29	Request Management	The system provides the ability to automatically determine duplicate requests by type, date range, and physical location/geography (e.g., alleys, location in		Custom solution for proximity-based duplicate needed	

No.	Category	Requirement	Business Rules	System Capability	Comments
		park, open field, etc.).			
1.30	Request Management	The system allows duplication algorithms to be configured at the service type level.		Custom solution for proximity-based duplicate needed	
1.31	Request Management	The system provides the ability to create parent-child relationships so multiple service requests may be linked to a master request.		OOTB Salesforce – Parent Record Look-Up	
1.32	Request Management	The system provides the ability to automatically link more than one master service request to another master service request.		Custom duplicate check logic can link duplicate child records to parent case	Need more information
1.33	Request Management	The system provides the ability to create a follow-on action without generating a new service request.		OOTB Salesforce - Workflow	
1.34	Request Management	The system provides the ability to map all nearby requests for manual duplication at time of intake.		Custom solution for proximity-based duplicate needed	Need to information to understand manual vs automated logic defined in 1.32
1.35	Request Management	The system provides a unique identifier for each requestor, so that all requests and contacts from a requestor may be linked (e.g., for the purpose of		OOTB Salesforce – Community User and Contact Mgmt	

No.	Category	Requirement	Business Rules	System Capability	Comments
		providing a history for that requestor).			
1.36	Request Management	The system provides the ability to recognize repeat callers/web District users and assign unique identifier appropriately.		OOTB Salesforce – Contact Mgmt	
1.37	Request Management	Noting that some requestors may choose to remain anonymous, the system provides the ability to require District user - administrator to satisfy a prompt about the requestor's choice.		OOTB Salesforce – Record Auto-Numbering	
1.38	Request Management	The system provides the ability to redact requestor information for reporting, printing or service fulfillment if the requestor chooses to remain anonymous.		Field Level Security can be used to restrict visibility of requestor data. Customization will be required to redact based on conditions.	
1.39	Request Management	The system provides administrative tools for name correction, duplicate checking, and merging of contacts.		OOTB Duplicate check rules can be used.	
1.40	Request Management	The system provides an undo function for the most recently entered field.		For inline edits, undo function is available OOTB	
1.41	Request Management	The system requires District user confirmation of a deletion.		OOTB Salesforce – Confirm deletion	
1.42	Request	The system provides an		OOTB	

No.	Category	Requirement	Business Rules	System Capability	Comments
	Management	automatic default to today's date with the ability to override.		Salesforce – Date Field Default	
1.43	Request Management	The system provides the ability to record activity notes related to a request that are unlimited in length, and provides scrolling capabilities for viewing.		Unlimited text is not possible. Multiple (practically unlimited) note records can be created	Max limit of 32,000 characters on Salesforce long text field
1.44	Request Management	The system provides the ability to display notes in reverse chronological order and include author identification.		OOTB Salesforce – Related list sorting	
1.45	Request Management	The system provides automatic date/timestamp by District user ID for all activity.		OOTB Salesforce – Standard Fields	
1.46	Request Management	The system provides the ability to record the person making an activity note entry based on District user ID.		OOTB Salesforce – Standard Fields	
1.47	Request Management	The system provides spell checking capabilities.		Spell check can be run through browser spell check / browser add-ons like Grammarly.	
1.48	Request Management	The system provides auto save capabilities.		Custom auto-save functionalit	Deloitte does not recommen

No.	Category	Requirement	Business Rules	System Capability	Comments
				y is not recommended	d “auto save” as this can result in dirty data and invalid records
1.49	Request Management	The system provides the ability to set up approval authority based on request type or task.		OOTB Salesforce - Workflow	
1.50	Request Management	The system provides the ability to display the requestor's previous interactions using different search features.		OOTB Salesforce – Case Mgmt and Related Cases and Activities	
1.50	Request Management	The system provides the ability to display the requestor's previous interactions using different search features.		OOTB Salesforce – Case Mgmt and Related Cases and Activities	
1.51	Request Management	The system provides the ability to prevent a request from being closed until all associated work is completed.		Custom validation rule required on case object to look up related Work Order status	Solution built for City of San Diego
1.52	Request Management	The system provides the ability to have the knowledge base content and service request form simultaneously appear on the computer monitor.		OOTB Salesforce – Case Mgmt with Knowledge Related List	

No.	Category	Requirement	Business Rules	System Capability	Comments
1.53	Request Management	The system provides the ability to initiate a service request from within a knowledge base article using the appropriate template for service request entry based on request type.		Hyperlinks in the knowledge article can redirect users to the new case creation page.	
1.54	Request Management	The system provides the ability to initiate an inquiry record from within a knowledge base article to record the topic of the call.		OOTB Salesforce – Assign Knowledge Article used to resolve inquiry Case	
1.55	Request Management	The system provides context-sensitive online help when a procedure is incorrectly executed.		OOTB Salesforce – Error / Validation message	
1.56	Request Management	The system provides the ability to track the origin of the request.		OOTB Salesforce – "Source" field on Case	Can auto-populate from web requests
1.57	Request Management	The system provides the ability to audit a request based on District user-defined criteria.		Field-level tracking is OOTB	
1.58	Request Management	The system provides the ability to associate a request with multiple requestors.		Contact Roles can be used to tag more than one requestor / contact to a request.	There are multiple requirements that seem to be related to duplicates. Need to finalize on expected behavior

No.	Category	Requirement	Business Rules	System Capability	Comments
					of system
1.60	Routing and Escalation	The system provides the ability to automatically route requests as cases with attachments to the appropriate provider, department, or staff for prompt action, to notify the department that the case is in queue, and to allow the department to forward the case to another department or return it to District user/originator if necessary.		OOTB Salesforce –Case Queues and Queue Assignment	
1.61	Routing and Escalation	The system provides the ability to establish (business rules e.g. time allowed) for each of the steps in a request that is sent to multiple departments.		SLA per case step / type , violation identification and actions can be built with customizations or configuration based on complexity.	Reports and dashboards can be used to identify delayed Cases
1.62	Routing and Escalation	The system allows case / tasks to be routed or re-routed manually to work queues.		OOTB Salesforce – Case Queues and Queue Assignment	
1.63	Routing and Escalation	The system allows notification of an item in the work queue (or member(s) of a group) via email or dynamic refresh of the work queue display.		OOTB Salesforce – Case Queues	

No.	Category	Requirement	Business Rules	System Capability	Comments
1.64	Routing and Escalation	The system provides the ability to route a service request to an outside agency.		Community users can be assigned cases / records for work.	
1.65	Routing and Escalation	The system provides the ability to automatically assign staff on a geographic basis.		Note: Custom solution required for GIS-based assignment / location based assignment.	
1.66	Routing and Escalation	The system provides the ability to assign staff based on responses to flex questions.		Criteria based assignments are configurable. Salesforce assignment rules.	
1.67	Routing and Escalation	The system allows case / tasks to be routed or re-routed manually to work queues.		Duplicate of 1.62 OOTB Salesforce – Case Queues and Queue Assignment	
1.68	Routing and Escalation	The system provides the ability to map the shortest distance daily routes.		Salesforce Field Service Lightning or other Routing Software required	Need Field Service Lightning or other routing software
1.69	Routing and Escalation	The system provides the ability to create the		Salesforce Field	Need Field

No.	Category	Requirement	Business Rules	System Capability	Comments
		shortest distance daily route for selected and assigned service requests in a work queue. i.e. several meter problems		Service Lightning or other Routing Software required	Service Lightning or other routing software
1.70	Routing and Escalation	The system provides the ability to dynamically reroute service requests.		Salesforce Field Service Lightning or other Routing Software required	Need Field Service Lightning or other routing software
1.71	Routing and Escalation	The system provides the ability to automatically assign a priority code, based on transaction (business activity) type, with an override allowed (e.g., for Commissioners requests, managing directors' office requests, service requests which impact a large group of requestors, time sensitive requests, or after hours requests).		OOTB Salesforce – Case Mgmt Priority field defaults	
1.72	Routing and Escalation	The system provides the ability to escalate requests manually or automatically based on predefined escalation rules		OOTB Salesforce – Workflow; Case Queues and Queue Assignment	
1.73	Routing and Escalation	The system provides the ability to automatically escalate service requests that indicate the presence of critical safety issues. The system should		Need More Information – Sounds like a call center application (CTI) is	We assume CTI integration to be out of scope for Phase

No.	Category	Requirement	Business Rules	System Capability	Comments
		include the ability to provide prompts/questions to an agent to help in determining level of criticality, including taking actions such as transfers to 911.		needed for scripting	1
1.74	Routing and Escalation	The system provides the ability to create and update automatic or manual reminders that are time triggered and defined for each query type.		Reports can be scheduled (Queries) . Time based workflows can fire based on time intervals after events / criteria is met	
1.75	Routing and Escalation	The system provides alerts and notifications to responsible parties upon call assignment or when past due.		OOTB Salesforce – Activities and Activity Notification and Dashboards	
1.76	Routing and Escalation	The system provides the ability to alert at threshold volumes for service types.		OOTB Salesforce – Reporting and Dashboards	Can leverage reports and dashboards to see open case volumes by type
1.77	Routing and Escalation	The system provides automatic escalation to supervisor(s) for past due, emergency, high visibility/urgent requests		Customizations will be required if criteria beyond the	

No.	Category	Requirement	Business Rules	System Capability	Comments
		or large volumes of requests.		record (high volume) needs to be considered for escalation	
1.78	Routing and Escalation	The system provides the ability to push alerts to mobile devices.		SF Mobile app – OOTB function for internal users.	
1.79	Routing and Escalation	The system provides the ability to set business hours in calculation of performance against (policies), noting that business hours may be different across different service request types.		Salesforce business hours modules can be used. If business hours are different by case type – customization will be required.	
1.80	Routing and Escalation	The system provides the ability to identify requests that are nearing their assigned (business rule) time in system.		Reports and list views sorted by due date can be used to narrow down these records.	
1.81	Routing and Escalation	The system provides the ability to identify requests that have exceeded their (business rule) time in system.		Overdue reports can filter out records in violation of SLA	
1.82	Routing and	The system provides		Time	

No.	Category	Requirement	Business Rules	System Capability	Comments
	Escalation	the ability to notify a specified list of District users that a service request is nearing completion.		based workflow / alerts to remind users of time to complete task	
1.83	Routing and Escalation	The system provides the ability to notify a specified list of District users that a service request has not been completed in the agreed upon (business rule) timetable.		Report emailed to users / email alerts to notify users of SLA violation.	
1.84	Routing and Escalation	The system provides the ability to flag a service request as "under investigation." This will cause the system to retain the service request and all associated attachments as long as the record remains under investigation, even if normal records retention policy rules would have deleted it.		OOTB Salesforce – Case Status field or Custom Field	Can use Boolean field to indicate a case is under investigation, which could filter it from deletion
1.85	Routing and Escalation	The system provides the ability to enter multiple outcomes for a service request.		OOTB Salesforce – Case Mgmt and Fields	Multi select outcome or closure reason field
1.86	Routing and Escalation	Language Options:		Translation workbench for internal users is available to translate field labels and values to other	

No.	Category	Requirement	Business Rules	System Capability	Comments
				languages.	
1.87	Routing and Escalation	The system provides the ability to enter multiple outcomes for a service request.		Duplicate of 1.85	
1.88	Multi-Channel Integration	The system provides the ability to accept requests or inquiries and track those requests in a single database or source from multiple channels, including:		See below	
1.89	Multi-Channel Integration	In Person		OOTB Salesforce – Case Mgmt	Create by District user
1.90	Multi-Channel Integration	By Phone		OOTB Salesforce – Case Mgmt	Create by District user
1.91	Multi-Channel Integration	By Email		OOTB Salesforce – Case Mgmt	Create by District user
1.92	Multi-Channel Integration	By USPS mail		OOTB Salesforce – Case Mgmt	Create by District user
1.93	Multi-Channel Integration	By Kiosk		OOTB Salesforce – Case Mgmt	Create by District user
1.94	Multi-Channel Integration	By TTY		OOTB Salesforce – Case Mgmt	Create by District user
1.95	Multi-Channel Integration	By email		OOTB Salesforce – Case Mgmt	Create by District user
1.96	Multi-Channel Integration	By web forms from District Web Site		OOTB Salesforce – Case Mgmt	Through self-service web portal

No.	Category	Requirement	Business Rules	System Capability	Comments
					and form
1.97	Multi-Channel Integration	Via tablet/pad/smartphone		OOTB Salesforce – Case Mgmt	Through self-service web portal and form or create by District user
1.98	Multi-Channel Integration	Via social media (e.g. Twitter, Facebook, etc.)		OOTB Salesforce – Case Mgmt	Create by District user
1.99	Communications Management	The system provides the ability to support both unstructured and structured inbound e-mails.		OOTB Email to case. Case record will have attached email which will help in further data input.	
2.00	Communications Management	The system provides the ability to date/time stamp attachment entries.		OOTB Salesforce – Attachment and Standard Fields	
2.01	Communications Management	The system provides the ability to recognize invalid format or entries.		OOTB Salesforce – Field Validations	
2.02	Communications Management	The system provides the ability to share service request-related notes generated by District personnel.		OOTB Salesforce – Case Notes; Security and Permissions settings	
2.03	Communications	The system provides internal real-time		OOTB Salesforce	

No.	Category	Requirement	Business Rules	System Capability	Comments
	Management	message routing capability for broadcasting content to all, or a specific group of District users		- Chatter	
2.04	Documentation Management	The system provides the ability to handle Microsoft and or Apple products (Word, Excel, PowerPoint, etc.).		OOTB Salesforce – Attachment upload	Can upload and attach most common formats
2.05	Documentation Management	The system allows a District user to check in/check out/store documents without going through menu options within the source products.		Non-Native Salesforce capability	Live document updates and check in/out capabilities should be managed via SharePoint
2.06	Documentation Management	The system provides the ability to view documents in their native format without having the original application loaded on the viewer's computer.		Certain web friendly documents will be displayed – PDF, Word, Powerpoint, html, txt, images etc.	
2.07	Documentation Management	The system provides the ability for the District's public web site to interface with the CRM tool's database so that requestors can access it via the web.		Custom Force.com Pages for External Users	Leverage custom Force.com pages and the community portal
2.09	Documentation Management	Ability to generate report on all fields: By Date, by time, by request type, by District		OOTB Salesforce Reporting	Assuming all these items are captured

No.	Category	Requirement	Business Rules	System Capability	Comments
		member District, by District defined geographic unit, on resolution time, on dollar amounts, on any combination of data in the system			on case in Salesforce, report can be created

2. Self Service Request Management Requirements (Public access through the District's public facing applications)

No.	Category	Requirement	Business Rules	System Capability	Comments
3.01	Requestor Self Service	The system provides the ability for the District's public web site to interface with the CRM tool's database so that requestors can access it via the web.		Duplicate of 2.07	
3.03	Requestor Self Service	The system provides the ability for requestors to create a requestor defined map with updated service request content.		Google Maps integration required to support mapping needs; non-native Salesforce functionality	Leverage similar solution to City of San Diego Google Maps integration recommended to support mapping needs.
3.04	Requestor Self Service	The system provides the ability for the public web site to provide instructions for non-English speaking individuals.		Google Translate Webpage; Can support complete translation of page, but maintenance efforts will dramaticall	City of San Diego leveraged Google translate on page to support Spanish speakers

No.	Category	Requirement	Business Rules	System Capability	Comments
				y increase	
3.05	Requestor Self Service	The system supports the presentation of information through a limitless number of web links.		Salesforce Knowledge Articles can be searched and displayed via customer Force.com pages or through the community portal	We will leverage the community portal or Visual Force pages
3.06	Requestor Self Service	The system provides the ability for a requestor to use a single account log-in to access a variety of District services regardless of the department offering the service for the purpose of submitting or tracking requests.		OOTB Salesforce – Community Portal or custom Force.com pages	
3.07	Requestor Self Service	The system provides the ability for requestors to create (and change) a personal password.		OOTB Salesforce – Community Portal User	
3.08	Requestor Self Service	The system provides the ability for requestors to submit requests anonymously based on request / business activity type.		OOTB Salesforce – Case Mgmt	Create case from non-logged in user; not entering contacting details
3.09	Requestor Self Service	The system provides the ability for requestors to track requests anonymously based on request type.		OOTB Salesforce – Community Portal	View open Cases by Case Type
3.10	Requestor	The system provides		OOTB	Using

No.	Category	Requirement	Business Rules	System Capability	Comments
	Self Service	the ability to auto-suggest service request content based on the type of request being created.		Salesforce - Community Portal; Dynamic picklists	OOTB community portal case create, dynamic picklists can provide logical options based on request type
3.11	Requestor Self Service	The system provides the ability for requestors to submit and update personal contact information in a requestor profile, which would be validated by the District.		OOTB Salesforce – Community Portal User with field validations	If manual approval of profile changes is required, custom workflow would be required
3.12	Requestor Self Service	The system provides the ability to create a contact log that identifies the frequency and number of interactions with requestors, regardless of channel utilized.		OOTB Salesforce – Contact Mgmt and related Activities and Cases	Cases created would be tracked at the contact level, and Activities created would be tracked at the contact level
3.13	Requestor Self Service	The system provides the ability to send e-mail (requestor preferred method) confirmations of any changes requestors made to their requestor profile.		OOTB Work Flow emails can be sent out when profile updates match	Conga is recommended for email templates

No.	Category	Requirement	Business Rules	System Capability	Comments
				workflow entry criteria	
3.14	Requestor Self Service	The system provides the ability for web entry forms for the public to use the same business-defined editing rules as transactions entered by a District user.		OOTB Salesforce – Community Portal and Force.com pages	
3.15	Requestor Self Service	The system provides the ability to tailor the web entry forms for public use to a subset of transactions used by the District.		OOTB Salesforce – Community Portal and Force.com pages	
3.16	Requestor Self Service	The system provides the ability to notify a requestor of the expected (time frame) for the request type and direct them to place a call for more urgent needs.		OOTB Salesforce – Knowledge Articles	
3.17	Requestor Self Service	The system provides the ability to provide additional information defined for the request type, such as questions that determine whether the appropriate request type has been selected.		OOTB Salesforce – Knowledge Articles	
3.18	Requestor Self Service	The system provides the ability for on-line service requests to generate error messages indicating the missing information if all required information is not entered.		OOTB Salesforce – Community Portal; Case Mgmt; Required fields and field validations	
3.19	Requestor	The system provides		Configurab	

No.	Category	Requirement	Business Rules	System Capability	Comments
	Self Service	the ability for the District to temporarily disable certain service request types.		le case type setup can help enable disable case types to the public.	
3.20	Requestor Self Service	The system provides the ability to conduct on-line transactions and reservations, including but not limited to: applying for permits, reserving locations, filing a meter complaint,		OOTB Salesforce – Community Portal Workflow Custom scheduling solution	Self-service reservation and permitting would leverage workflow and custom scheduling solution
3.21	Requestor Self Service	The system provides the ability to validate addresses entered by a requestor on a self-service request.		OOTB Salesforce – Case Mgmt PLUS Address Validation Tool Integration	Deloitte recommends address validation; Smarty Streets was used at City of San Diego
3.22	Requestor Self Service	The system provides the ability to require an e-mail address confirmation on entry point.		OOTB Salesforce – Required fields	
3.23	Requestor Self Service	The system provides the ability for a requestor to attach a document or image to the service request		OOTB Salesforce – Attachment	
3.24	Requestor Self Service	The system provides the ability to create a business rule that limits the number of attachments that can be posted to a single		OOTB Salesforce – Attachment	Can add custom rule to limit number of attachmen

No.	Category	Requirement	Business Rules	System Capability	Comments
		service request.			t (done for City of San Diego)
3.25	Requestor Self Service	The system provides a trouble-shooting guide for requestors		OOTB Salesforce – Knowledge Articles	
3.26	Requestor Self Service	The system provides the ability to track a District user's activity when they are attempting to resolve issues.		OOTB Salesforce – Field-level tracking	
3.27	Requestor Self Service	The system provides ability for call center agent to retrieve a service request that was submitted online via self-service		OOTB Salesforce – Case Mgmt and Case Search	
3.28	Requestor Self Service	The system provides the ability to post web entries as real-time transactions to the CRM database.		OOTB Salesforce – Community Portal	
3.29	Requestor Self Service	The system provides the ability to display to the requestor a confirmation page after submission of a service request via the web.		OOTB Salesforce – Community Portal and Case save confirmation	
3.30	Requestor Self Service	The system provides the ability to display to the requestor a confirmation page after submission of a service request via the web.		Duplicate of 3.30	
3.31	Requestor Self Service	The system provides the ability to automatically send an email to the requestor that submits a request		Email confirmation can be sent. Customizat	Conga is recommended for email templates,

No.	Category	Requirement	Business Rules	System Capability	Comments
		through the website to acknowledge receipt with the unique service request number.		ion is needed if specific formatting is needed.	if required
3.32	Requestor Self Service	The system provides the ability for a requestor to identify multiple email addresses to be used for confirmation or status updates.		Custom Solution Required	
3.33	Requestor Self Service	The system allows requestor to review the status of a service request and their service request history.		OOTB Salesforce – Contact Mgmt; Case Related List	
3.34	Requestor Self Service	The system provides the ability to control how or if additional information can be added to an existing service request.		OOTB Salesforce – Case Mgmt and Edit Permissions	
3.35	Requestor Self Service	The system provides the ability to notify a requestor upon change of status of a service request such as completion of the request.		OOTB Salesforce – Case Notifications	
3.36	Requestor Self Service	The system provides ability for requests submitted via requestor self-service to be automatically routed to the District user/originator call center for prompt case assignment based on the District's business rules as defined in the CRM system.		OOTB Salesforce – Case Queue Assignment Rules	

No.	Category	Requirement	Business Rules	System Capability	Comments
3.37	Requestor Self Service	The system provides ability for call center agent to retrieve a service request that was submitted online via self-service		Duplicate of 3.27	
3.38	Requestor Self Service	The system provides ability to detect duplicates when a call comes into District user/originator and a requestor has already submitted a request.		Custom duplicate solution will be required	Proximity based duplicate request was defined above. Is this different?
3.39	Requestor Self Service	The system provides the ability for a call center agent to retrieve any documents or images included with a service request submitted online via self-service.		OOTB Salesforce – Case Attachments	
3.40	Requestor Self Service	The system provides the ability to automatically send a requestor satisfaction survey based on request type within a District user-defined timeframe.		Survey force Appexchange app can be used to send out automatic surveys. Some customization and configuration is required for initial setup.	
3.41	Requestor Self Service	The system provides the ability for requestors to opt-in/out of e-mailings, newsletters, surveys and/or special promotions.		Communication preferences can be captured and respected	

No.	Category	Requirement	Business Rules	System Capability	Comments
				before sending out communications. Will require customizations.	
3.42	Requestor Self Service	The system provides the ability to scan social media sites and parse information into usable form.		Not OOTB in standard Service Cloud	Other solutions will need to be discussed for contextualization
3.43	Requestor Self Service	The system provides the ability to complete/attach forms/applications to the service request.		OOTB Salesforce – Case Attachments	Can also create custom web form for application
3.44	Requestor Self Service	The system provides the ability to capture multiple address types.		OOTB Salesforce -Case Fields	
3.45	Requestor Self Service	The system provides the ability to capture multiple phone numbers.		OOTB Salesforce -Case Fields	
3.46	Requestor Self Service	The system provides the ability to capture multiple email addresses.		OOTB Salesforce -Case Fields	
3.47	Requestor Self Service	The system provides the ability to capture multiple email addresses.		Duplicate of 3.47	

3. Park Reservation and Permitting

No.	Category	Requirement	Business Rules	System Capability	Comments
5.01	Park Reservation	The system provides the ability for the District		OOTB Salesforce	

No.	Category	Requirement	Business Rules	System Capability	Comments
	and Permitting	user / customer to select the service request (business activity) type from a drop down list or auto fill.		– Case Fields and Community Portal	
5.02	Park Reservation and Permitting	Allows user to view parks and information about each park with mouse over a map or diagram depicting the park; including availability via web page including calendar	Stylized usable for event planning (drawing) GIS	Custom Solution will be required	Custom Force.com and availability solution will be developed. Will leverage some of City of San Diego's scheduling solution.
5.03	Park Reservation and Permitting	User can select park permit / reservation by TYPE: (via dropdown menu)	Admin Add or delete event types	OOTB Salesforce – Case Fields and Community Portal	
5.04	Park Reservation and Permitting	TYPE: Small Event: family picnic, wedding, funeral		OOTB Salesforce – Case Fields and Community Portal	
5.05	Park Reservation and Permitting	TYPE: Corporate and large events: Car shows etc.		OOTB Salesforce – Case Fields and Community Portal	
5.06	Park Reservation and Permitting	TYPE: Moving Events: large and Small Parades etc.		OOTB Salesforce – Case Fields and Community Portal	

No.	Category	Requirement	Business Rules	System Capability	Comments
5.07	Park Reservation and Permitting	TYPE: Sporting Events: 10K's etc.		OOTB Salesforce – Case Fields and Community Portal	
5.08	Park Reservation and Permitting	User is prompted to select event TYPE		OOTB Salesforce – Case Fields and Community Portal	
5.09	Park Reservation and Permitting	After TYPE selected a standard (administrator customizable) Web form for that event TYPE is generated	Not actual " form" but path to the next step	OOTB Salesforce – Community Portal Permit Object or custom page	Can leverage OOTB or more customized force.com form
5.1	Park Reservation and Permitting	The system will allow requestors to select a "SUB-TYPE" i.e. birthday party, family reunion, funeral, wedding etc.		OOTB Salesforce – Case Fields and Community Portal	
5.11	Park Reservation and Permitting	System prompts user to create account with password to submit form	How far can a user go without a Password	OOTB Salesforce – Community Portal	
5.12	Park Reservation and Permitting	System collects: Name; first last, Street address, District, State, Zip-code. Email address, phone number, communication preference		OOTB Salesforce – Community Portal User Setup	
5.13	Park Reservation and Permitting	System generates a unique customer number and transaction or case/request number		OOTB Salesforce – Community	

No.	Category	Requirement	Business Rules	System Capability	Comments
				Portal User Setup	
5.14	Park Reservation and Permitting	System facilitates searches by customer name, phone number, customer number, or case/requesting number		OOTB Salesforce Search	Global search can be used
5.15	Park Reservation and Permitting	System allows for attachment of forms to requests i.e. insurance documents	Customer can submit themselves or District user can attach	OOTB Salesforce - Attachments	
5.17	Park Reservation and Permitting	System can display customer history showing all previous requests and permits granted or denied		OOTB Salesforce – Community Portal Contact Mgmt and Related Records (Activities, Cases, Permits, etc.)	
5.18	Park Reservation and Permitting	System shall link to Credit Card / Bank cash card payment system		Custom PCI-compliant solution is required	Requires PCI compliant, payment gateway.
5.19	Park Reservation and Permitting	System will be "mobile" capable: useable on android and apple smart phone devices, all "pad" devices	Internal and external customers	OOTB Salesforce – Mobile Responsive pages	
5.20	Park Reservation and Permitting	System shall have form field validation. i.e. zip and District must match from a look up table for example	Accommodate international addresses	OOTB Salesforce – Field Validations	

No.	Category	Requirement	Business Rules	System Capability	Comments
5.21	Park Reservation and Permitting	System shall have spell check		Spell check can be handled by browser or browser plug-in	Browser spell check or browser add-in
5.22	Park Reservation and Permitting	System shall support Active Directory Single Sign on		OOTB Salesforce – SSO integration	
5.23	Park Reservation and Permitting	The system provides a status field that includes, but is not limited to: open, in progress, suspended, field verification, on hold, complete, escalated, or other.	Internal Admin has option to change status field terminology	Duplicate of 1.06 OOTB Salesforce – Case Mgmt Status Field	
5.24	Park Reservation and Permitting	The system provides the ability to automatically route requests as cases / notifications with attachments to the appropriate provider, department, or staff for prompt action, to notify the department that the case is in queue, and to allow the department to forward the case to another department or return it to District user/originator if necessary.		Duplicate of 1.60 OOTB Salesforce –Case Queues and Queue Assignment	
5.25	Park Reservation and Permitting	The system creates a "interactive" "mobile" map and calendar of Park statuses enabling permitting Staff, District General Services and Harbor Police to see the permit issued or in progress status for planning and		Custom solution most likely required	Potential Google Maps or GIS integration and custom Force.com page

No.	Category	Requirement	Business Rules	System Capability	Comments
		enforcement on a 7/24 basis			
5.26	Park Reservation and Permitting	The system will enable the requestor to see the status of their requests by logging in to their account	Also show requestor, pending approval various documents, i.e. insurance, site maps, fire marshal, 501c3 status letters - system notifies customer of missing documents with deadline	OOTB Salesforce – Community Portal PLUS Case Mgmt PLUS Custom Permitting Solution	Permitting solution and workflow may require customization
5.27	Park Reservation and Permitting	email can be generated by Permitting staff(by system) to notify a user of required documents and forward appropriate link to a web form to fill out.		Requires custom template to enable user friendly communication	Conga is recommended to support email templates
5.29	Park Reservation and Permitting	System can notify requestor if deposit has not been received and give a deadline for the permit to be valid.		OOTB Salesforce – Case Fields	May be part of large custom permitting solution
5.31	Park Reservation and Permitting	System will generate a permit when approval is finished. Permit will be delivered to requestor via requestor's	print from account created	Custom template will be required; either	Conga is recommended to support permit

No.	Category	Requirement	Business Rules	System Capability	Comments
		preferred method		custom Visual Force or Conga	template and communication
5.32	Park Reservation and Permitting	System allows users (admins) to set business rules unique to specific parks by park number i.e. park is only allowed to have # of people	Related to compatibility of event - Admin override of business rules	Custom validations and rules engine	Will be included as part of custom permit solution
5.33	Park Reservation and Permitting	System allows users (admins) to set situational business rules, i.e. one park has scheduled a funeral so the park on either side will be considered unavailable for corporate parties at the same time.	Related to compatibility of event - Admin override of business rules	Custom validations and rules engine	Will be included as part of custom permit solution
5.34	Park Reservation and Permitting	System shall allow customer to save work and return to same location to complete		Custom Submit vs standard Save button or OOTB status field	As long as required fields are populated for save, user can return. User will need to indicate when application is ready to submit
5.35	Park Reservation and Permitting	Notifications: Capability for notifications to be sent, surveys sent, or thank you note, reminders (auto)		Need more detailed requirement Some OOTB notifications can be	Conga is recommended to support templates

No.	Category	Requirement	Business Rules	System Capability	Comments
				used	
5.36	Park Reservation and Permitting	Park permit to have a link back to 311 from the actual permit		OOTB Salesforce – Case Mgmt and Attachments	
5.38	Park Reservation and Permitting	Save application for 3 years		Custom archiving or deletion rules can be defined	Does Port want to archive or delete?
5.39	Park Reservation and Permitting	Public facing permitting capability		OOTB Salesforce – Community Portal PLUS Case Mgmt PLUS Custom Permitting Solution	Permitting solution and workflow may require customization
5.4	Park Reservation and Permitting	Site and leagues Districts field management	Multi/simultaneous reservation holds to be reviewed by staff	OOTB Salesforce – Separate Event Type at Sports venue	
5.41	Park Reservation and Permitting	Customer account management		OOTB Salesforce – Community Portal	
5.42	Park Reservation and Permitting	eGift card capability		OOTB Salesforce – Contact Types (Payor vs Event Owner)	Gifting a park reservation to another person

No.	Category	Requirement	Business Rules	System Capability	Comments
5.43	Park Reservation and Permitting	Search by telephone, name, email, organization, date range, zip code etc.		OOTB Salesforce – Global Search	
5.44	Park Reservation and Permitting	Escalation: work flow time in progress		OOTB Salesforce – Workflow Rules	
5.45	Park Reservation and Permitting	Set up and break down days should appear on calendar with variance in pricing for setup etc.		Custom Permitting / Scheduling Solution	Will fall into custom permitting solution
5.46	Park Reservation and Permitting	Administrator defined calendar days, blackouts, holidays, maintenance closures etc.		Custom Permitting / Scheduling Solution	Will fall into custom permitting solution
5.47	Park Reservation and Permitting	Admin manage and change fee structure.		OOTB Salesforce – Custom Object or Custom Labels	Depending on complexity, may require custom solution

4. General Permitting

The District permits various commercial activities that occur on the tidelands. Some examples are Environmental Usage Permits, Boat Bottom Cleaning, News Stand Deployment, Park Usage permits, reservation/event permits

No.	Category	General Requirements	Business Rules	System Capability	Comments
6.01	General Permitting	The system shall allow / require a user to create an account with password		OOTB Salesforce – Community Portal User Setup	
6.02	General Permitting	The system shall allow users to choose a business activity from a drop-down list		OOTB Salesforce – Community Portal User Setup	

6.03	General Permitting	The system shall allow / require users to fill out forms with pertinent information as it relates to the specific activity they have chosen		OOTB Salesforce – Fields and Field Layout by Object	
6.04	General Permitting	The system shall allow / require a user to attach a document to their request. i.e. license, pictures, insurance documents.		OOTB Salesforce – Attachments and Validation Rules	
6.05	General Permitting	The system shall create a workflow biased upon the type of permit request		OOTB Salesforce - Workflow	
6.06	General Permitting	The system shall for internal use display number of days until a certain document is required to be submitted		OOTB Salesforce – Formula Field	

5. System Integration

#	Category	General Requirement	Business Rules	System Capability	Comments
1	System Integration	SAP Financial	Link to payment portal	Not true integration to FI. Will need details on payment to support automated or manual accounting update process	
3	System Integration	Documentum	N/A	N/A	Integration will be with SharePoint
4	System	Share Point	Bi-	Custom	District-

	Integration		directional integration	Integration required	wide. Microsoft collaboration/document library app
5	System Integration	MS Outlook	Exchange connector	Ability to send emails from Port addresses and calendar invites	
6	System Integration	ARC GIS	Unidirectional integration	Custom GIS integration will be developed based on requirements	District-wide. ESRI GIS app

6. Reporting

Req. No.	Category	Reporting Requirement	Business Rules	System Capability	Comments
6.01	Reporting	The System provides the ability to generate reports based on a set of key performance indicators as designated by the Port.		OOTB Salesforce - Reporting	Please provide KPIs that require tracking
6.02	Reporting	The System provides a set of standard reports that will provide statistical reporting, including but not limited to:			
6.03	Reporting	Open service requests		OOTB Salesforce - Reporting	
6.04	Reporting	Closed service requests (fulfillment)		OOTB Salesforce - Reporting	

6.05	Reporting	Past due service requests		OOTB Salesforce - Reporting	
6.06	Reporting	Service requests related to an address, location, or intersection		OOTB Salesforce - Reporting	
6.07	Reporting	Service requests that have been escalated		OOTB Salesforce - Reporting	
6.08	Reporting	Service requests that are classified as high priority/urgent		OOTB Salesforce - Reporting	
6.09	Reporting	Average time to complete		OOTB Salesforce - Reporting	
6.1	Reporting	The System provides the ability for all reports to be date sensitive, including the ability to print/run for prior year's data, fiscal year, calendar year, date range (e.g., event reporting).		OOTB Salesforce - Reporting	
6.11	Reporting	The System provides the ability for reports to be run against both current and archived data.		Need BI Solution for reports against archived data	
6.12	Reporting	The System provides backlog, service activity, and closure rate statistics for all work order activities.		OOTB Salesforce - Reporting	
6.13	Reporting	The System provides the ability to report on quality measures such as number of ticket reassignments and quality of ticket entry and updates.		OOTB Salesforce - Reporting	Need to understand what "quality of ticket entry" means

6.14	Reporting	The System provides the ability to generate variance analysis reports comparing the actual time to complete to the estimate provided to the resident.		SLA Variance can be supported	
6.15	Reporting	The System provides ability to generate "hot-spot" reporting for geographic areas in pre-defined zones (e.g., zip code, census tract, etc.) or user-defined areas.		OOTB Salesforce - Reporting	
6.16	Reporting	The System provides the ability to generate "event" reporting based on time and location.		OOTB Salesforce - Reporting	
6.17	Reporting	The System provides number of inquiries per division/department.		OOTB Salesforce - Reporting	
6.18	Reporting	The System provides reporting on customer satisfaction.		OOTB Salesforce - Reporting	Through surveys
6.19	Reporting	The System provides the ability to print copies of records, standardized forms, emails, and letters.		OOTB Salesforce – Print screen PLUS Conga for letters and templates	Depending on template requirements, Conga may be recommended
6.2	Reporting	The System allows reports to be viewable on the screen, in hard-copy format, or available via the web (if security has been allowed to do		OOTB Salesforce - Reporting	

		this for the specific report(s)).			
6.21	Reporting	The System allows report results to be viewed in graphical format.		OOTB Salesforce - Reporting	
6.22	Reporting	The System allows report results to be viewed on a map.		Will leverage Google Maps to display case data	
6.23	Reporting	The System provides user friendly ad hoc query capabilities that do not require a user to understand backend database table structure.		OOTB Salesforce - Reporting	
6.24	Reporting	The System provides the ability to create calculated fields.		OOTB Salesforce – Summary Fields	
6.25	Reporting	The System allows multiple users to develop and run queries simultaneously.		OOTB Salesforce - Reporting	
6.27	Reporting	The System allows querying on multiple parameters (and within fields).		OOTB Salesforce - Reporting	
6.28	Reporting	The System allows query selection criteria to be named and saved for future use.		OOTB Salesforce - Reporting	
6.29	Reporting	The System allows newly defined reports to be added to the product's menus.		OOTB Salesforce - Reporting	
6.3	Reporting	The System allows for scheduling of pre-defined reports that can be waiting for the staff or		OOTB Salesforce - Reporting	

		pushed to them via email on demand, monthly, weekly, etc.			
6.31	Reporting	The System provides wizards to help guide the report writing process.		OOTB Salesforce - Reporting	
6.32	Reporting	The System provides that the report writer contain an author log, users, and date of most recent update.		OOTB Salesforce - Reporting	
6.33	Reporting	The System provides the ability to utilize pivot tables in the reports.		OOTB Salesforce - Reporting	Need more detail, but OOTB Reporting should cover this requirement
6.34	Reporting	The System provides the ability to flag reports or certain elements of the report as confidential and set permissions for access to reports.		OOTB Salesforce - Reporting	Field-level permissions
6.35	Reporting	The System provides the ability to filter reports by department and for department to secure access to departmental reports.		OOTB Salesforce - Reporting	
6.36	Reporting	The System provides report writer capabilities for the development of custom reports (e.g., Business Objects and Business Intelligence).		SFDC can be integrated with BI solution	

6.37	Reporting	The System provides the ability to export report data into other applications and formats (e.g., PowerPoint, Excel, Adobe, comma delimited, SQL, etc.).		OOTB Salesforce - Reporting	CSV, PDF, etc.
6.38	Reporting	The System provides report writer capabilities that allow direct export of a report or attachment to email.		OOTB Salesforce - Reporting	
6.39	Reporting	The System provides the ability to print labels, including mailing labels for resident-related mailings.		Custom templates	Depending on complexity, we may recommend Conga
6.4	Reporting	The System provides the ability to generate letters with appropriate formatting for mailing or sending via email.		Custom templates	Depending on complexity, we may recommend Conga
6.41	Reporting	The System provides the ability to record when and which types of form letters have been sent.		OOTB Salesforce – Communications	
6.42	Reporting	The System provides the ability to store copies of correspondence sent in an electronic/digital format.		OOTB Salesforce – Communications	
6.43	Reporting	The System has the ability to report on specified fields in a mobile environment.		OOTB Salesforce - Reporting	

6.44	Reporting	The System provides a data dictionary.		OOTB Salesforce - Object Fields Export	
6.45	Reporting	The System has the ability to run reports without impacting system performance levels.		OOTB Salesforce - Reporting	
6.46	Reporting	The System provides the capability to export data to multiple formats.		OOTB Salesforce - Reporting	Duplicate
6.47	Reporting	The System provides the ability to track information only calls by topic.		OOTB Salesforce - Reporting	
6.48	Reporting	The System provides the ability to auto refresh queries.		Ability to refresh saved reports and dashboards	
6.49	Reporting	The System provides dashboard capabilities that will display reporting information based on user defined roles within the CRM system.		OOTB Salesforce - Reporting Dashboards	
6.5	Reporting	The System provides the ability to customize dashboard information based on a user's desired level of information.		OOTB Salesforce - Reporting Dashboards	
6.51	Reporting	The System provides the ability to create dashboards on a real time basis.		OOTB Salesforce - Reporting Dashboards	
6.52	Reporting	The System provides the ability to use dashboards on a real time basis.		OOTB Salesforce - Reporting Dashboards	

6.53	Reporting	The System has the capability to drill down on data contained in the dashboards.		OOTB Salesforce - Reporting Dashboards	
6.54	Reporting	The System has the capability to establish "joins" in the database.		Certain limitations apply to OOTB Salesforce Reporting	
6.55	Reporting	The System has the capability to perform calculations.		Need More Information	
6.56	Reporting	The System has the capability to conduct a drill down from within a document generated by the system.		OOTB Salesforce - Reporting Dashboards	
6.58	Reporting	The System provides the ability to assign and/or link management summary reports for comparison over time and benchmarking against other municipalities.		Depending on detailed requirement, may require more robust reporting platform	
6.59	Reporting	The System provides the ability to generate reports based on resident surveys.		OOTB Salesforce - Reporting	
6.6	Reporting	The System provides the ability to conduct trending analysis.		Depending on detailed requirement, may require more robust reporting platform	
6.61	Reporting	The System provides the ability to search and report on data associated		OOTB Salesforce - Reporting	

		with service requests such as agent, resident contact information, address, FAQ article, special event, weather issue and/or request type.			
6.62	Reporting	The System provides crew level analytics and productivity reports.		OOTB Salesforce - Reporting	Need detailed requirements on what needs to be tracked
6.63	Reporting	The System provides the ability to create triggers to compare forecasted data to actual data.		Depending on detailed requirement, may require more robust reporting platform	
6.64	Reporting	The System provides the ability create "flags" on specific fields that are identified based on business rules.		OOTB Salesforce - Reporting	

7. Security

Req. No.	Category	General Requirement	Business Rules	Software Capability	Comments
7.01	Service Requirement	Vendor warrants that the software shall not contain any code that weakens the security of the application or the network that does not support a software requirement, including computer viruses, worms, time bombs, back doors, Trojan horses, Easter		Code Scans Available	

		eggs, and all other forms of malicious code.			
7.02	Service Requirement	The Vendor shall disclose the existence of all known methods for bypassing computer authentication in the procured product, and provide written documentation that all such access points created by the Vendor have been permanently deleted from the system.		Salesforce Requirement	
7.03	Service Requirement	The Vendor shall provide summary documentation of the procured product's security features and security-focused instructions on product maintenance, support, and reconfiguration of default settings.		Salesforce Requirement	
7.04	Service Requirement	If any sensitive District data is shared with the Vendor, the Vendor shall return or document the secure disposal of the District's data that is no longer needed by the Vendor		Should be included as part of contract	

7.05	Software System Integrity	The Vendor shall provide a system that generates error messages that provide information necessary for corrective actions without revealing information that could be exploited by adversaries.		OOTB Salesforce	
7.06	Software System Integrity	The Vendor shall not permit user credentials to be transmitted or shared in clear text. The Vendor shall not store user credentials in clear text, hard code credentials in the programming code, store credentials in any configuration files, or store credentials in software scripts, unless the Vendor and District agree that this is an acceptable practice for the procured product given the protection offered by other security controls. The Vendor shall only allow access protocols that encrypt or securely transmit login credentials (e.g., tunneling through Secure Shell Terminal Emulation [SSH], Transport Layer Security			

		[TLS]).			
7.07	Software System Integrity	The Vendor shall verify that the addition of security features does not adversely affect connectivity, latency, bandwidth, response time, and throughput specified.			
7.08	Access Management	Applications designed for normal end users shall run in the standard user context without elevated system administration privileges.			
7.09	Access Management	The Vendor shall document of all accounts (including, but not limited to, generic and/or default) that need to be active for proper operation of the procured product.			
7.1	Access Management	The Vendor shall configure each component of the procured product to operate using the principle of least privilege. This includes operating system permissions, file access, user			

		accounts, application-to-application communications, and energy delivery system services.			
7.11	Access Management	The Vendor shall document options for defining access and security permissions, user accounts, and applications with associated roles. The documentation should contain specific aspects of assigned privileges, with explanations for unique tasks, roles, and abilities granted within the software by each security role. The Vendor shall configure these options, as specified by the District.			
7.12	Access Management	The Vendor shall time stamp audit trails and log files, as specified by the District. The Vendor shall provide a list of all log management capabilities that the procured product is capable of generating and the format of those logs. This list shall identify which of those logs are enabled by default.			

7.13	Access Management	The Vendor shall document the levels, methods, and capabilities for authentication and authorization. The Vendor shall deliver a product that adheres to standard authentication protocols.			
7.14	Event Log Management	The Vendor shall provide logging capabilities or the ability to support the District's existing logging system. Logging capabilities provided by the Vendor shall be configurable by the District and support the District's security auditing requirements. As specified by the District, the procured product shall cover the following events, at a minimum (as appropriate to their function):			
7.15		Information requests and server responses			
7.16		Successful and unsuccessful authentication and access attempts			
7.17		Account changes			
7.18		Privileged use			
7.19		Application start-up and shutdown			
7.2		Application failures			

7.21		Major application configuration changes			
7.22		Any configuration changes or use with administrative privileges			
7.23	Event Log Management	The Vendor shall provide standard time synchronization in the procured product (e.g., Network Time Protocol [NTP], and IEEE 1508-2008). If the Vendor is not providing standard time synchronization and is providing an authoritative time source, the procured product shall be configured to synchronize to the authoritative time source.			
7.24	System maintenance Support	The Vendor shall provide summary documentation of its secure product development life cycle including the standards, practices, and development environment (including the use of secure coding practices) used to create or modify Vendor-provided energy delivery system hardware, software, and firmware.			

7.25	System maintenance Support	The Vendor shall provide timely software updates compatible with operating systems current to the release period. Under no circumstances shall an application's dependencies be compatible only with software that is End of Life (EOL) or scheduled to be EOL within 12 months of the software update's release. This includes operating systems, Internet browsers, and other third-party software versions such as Java or Adobe Flash.			
7.26	System maintenance Support	The Vendor shall provide documentation of its patch management program and update process (including third-party hardware, software, and firmware). This documentation shall include resources and technical capabilities to sustain this program and process.			

7.27	System maintenance Support	The Vendor shall provide a secure process for users to submit problem reports and remediation requests. This process shall include tracking history and corrective action status reporting.			

8. App Development / API Development – Integration

Req. No.	Category	General Requirement	Business Rules	Software Capability	Comments
8.01	API Openness to integration	Support for transformation and mapping between XML, XSD Validation, Xpath navigation, CSV, JSON, XLS		OOTB Salesforce	
8.02	API Openness to integration	Support a broad range of endpoints and message formats		OOTB Salesforce	
8.03	API Protocols	Native support for protocols: REST, SOAP, JSON, TCP/UDP, HTTP/S, EJB/RMI, MQTT, AMQ,AS2, SWIFT, FTP/S, SMTP/IMAP/POP3,SSH, MQ,.		OOTB Salesforce	
8.04	API Development	No code environment with templates for common end point connectors		OOTB Salesforce	

9. Mobile Environment

Req. ID	Category	Functional Requirement	Business Rule	Software Capability	Comments

9.1.1	Mobile	Supports access from major mobile device platforms including iOS, Android, and Windows. List all supported mobile devices.		OOTB Salesforce	Field user can access the system using an iPhone, iPad, or Windows Tablet with WIFI capability to view assigned work orders.
9.1.2	Mobile	Supports web-based access through Internet Explorer, Google, or Firefox.		OOTB Salesforce	Field user accesses the system using a Windows tablet through a VPN connection with an Internet Explorer browser.
9.1.7	Mobile	Ability to automatically optimize display for screen size of device used.		OOTB Salesforce on standard screens	Field user accesses the system on their iPhone to see assigned work orders.

10. User Types

User Types	Named Users	Concurent Users
Public Access users	None	Unlimited
Incoming Call Operators and Supervisors	20	20
Departmental Users / Admins	25	25
IT System Administrators	10	1

Appendix B: Optional Services

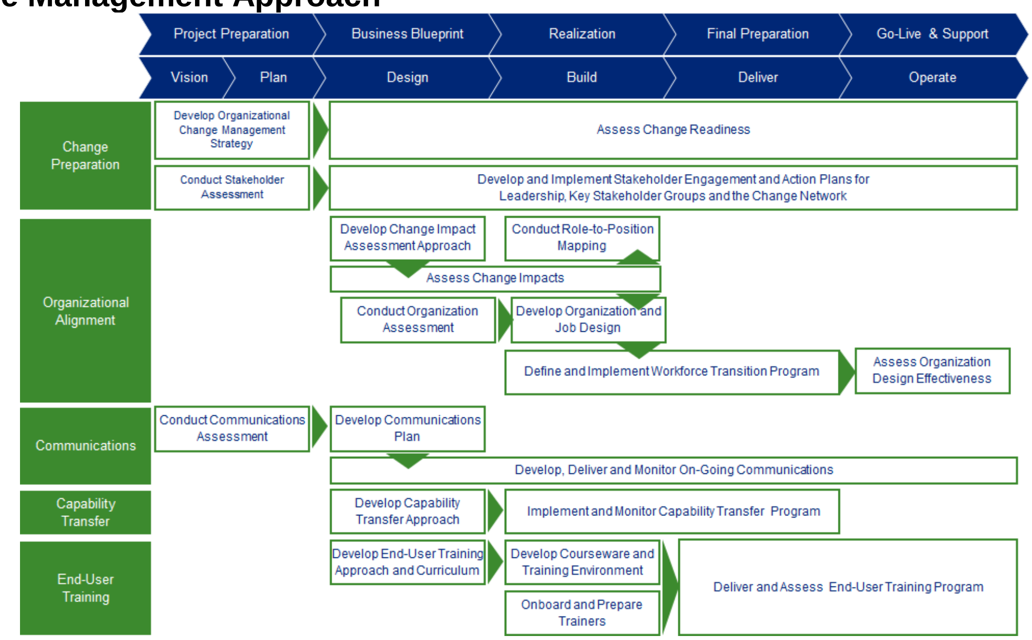
Change Management Services

Our change management approach will lead to less risk and the strongest possible business and technical solution for the District. The comprehensive, practical approach will help address the District's overarching project challenges, as well as any activity-specific challenges that may arise along the way.

This document summarizes the defined approaches for executing the OCM discipline for CRM. OCM activities include efforts within five areas of focus – or sub-disciplines. The OCM sub-disciplines described in this document (and their associated tasks and deliverables) include:

- Change Preparation
- Organizational Alignment
- Communications
- Capability Transfer
- End-User Training

Change Management Approach



App. B Figure 1: Change Management Approach

The goals of the OCM Strategy are to:

- Establish a structured framework to help individuals adapt to changes to their work environment, including new roles, responsibilities, processes, and technology
- Help employees become capable using the new technology as part of their business responsibilities
- Provide employees with opportunities to get involved with the initiative, demonstrate leadership and serve as a change champion among their peers
- Achieve maximum levels of ownership and action across all levels of the organization in response to the initiative

Appendix C: Milestone Deliverable Acceptance Form

Milestone ID and Title:		
Deliverable Implementer: [Name the role responsible for the realization of this deliverable]	Scheduled Fulfillment Date: [mm-dd-yyyy]	Actual Fulfillment Date: [mm-dd-yyyy]
Deliverable Description: *[Describe the deliverable in specific and measurable terms, per the Scope of Work]*		
Acceptance Criteria: *[List the acceptance criteria that reflect successful realization of this deliverable]* Acceptance criteria must be Specific, Measurable, Agreed, Realistic and Timely (SMART), per the Scope of Work.		
Changes to Involved or Affected User Stories and Acceptance Criteria (if applicable): *[Describe (per User Story) any changes to the Acceptance Criteria that result from the realization of this deliverable]*		
Approved/Rejected by District: Signature:.. Name:... Date:...		

Appendix D: Change Order Form

<table>
<tr><td>Change Request
Number:</td><td>Date:</td><td>Project Name:</td></tr>
<tr><td colspan="3">Requesting Party and Project Manager:

Receiving Party and Project Manager:</td></tr>
<tr><td colspan="3">Change Description:
[Insert a detailed description of the change, the area of the project schedule/plan being modified, and the benefits of making the change]</td></tr>
<tr><td colspan="3">Project Schedule/Plan Revision:
[Insert new dates, or attach a revised project schedule/plan, which shows the impact of the change, if any]</td></tr>
<tr><td colspan="3">Fees Revision:
Additional Fees: [insert value]
Additional Fees Due Date: [insert date]</td></tr>
<tr><td colspan="3">Agreed:
District of San Diego — Contractor
Signature: — Signature:
Printed Name: — Printed Name:
Title: — Title:
Date: — Date:</td></tr>
</table>

Appendix E: District Production Change Control Board

Any Production Changes implemented or deployed to District Services must comply with the District's Change Control Board (CCB) process. This applies to both on-premises District Services as well as District SaaS Services. In general:

- The District's CCB meeting occurs on Wednesdays at 11AM.
- Changes for the upcoming week should be submitted by Tuesday close of business, before the District CCB meeting.
- All changes to Production must have a Change Ticket submitted. Modifications to content are not considered changes for the purpose of CCB.
- Change Tickets must have the following information:
    - Date of the change
    - Start time / end time of the change
    - Description of the change
    - Change plan details
    - Will the change be service-impacting? (Will the Service go down?)
        - If the change is service-impacting, how long will the Service be down?
        - Is there a customer notification page that will be displayed during the outage?
    - Roll back plan for the change
    - Test plan for the change
    - Service Provider contact information for IT to call if there are issues
- "Emergency Changes" can be made outside the typical weekly cycle, but must be approved by a CCB member prior to the change being executed.
- It will be decided during the project whether District Staff or Service Provider will submit Change Tickets.

ATTACHMENT B
COMPENSATION & INVOICING
San Diego Unified Port District

This Attachment B is for Deloitte Consulting's ("Service Provider" or "Deloitte") Salesforce.com Customer Relationship Management (CRM) implementation services as set forth in Attachment A.

1. **COMPENSATION**

   a. For the performance and completion of the services under this Agreement, District shall pay Service Provider compensation as set forth hereunder.

      (1) Service Provider shall be compensated and reimbursed by District on the basis of invoices submitted each month for services performed during the preceding month. Invoice(s) shall be Lump Sum, Fixed Fee, or Time and Materials or any combination of all three.

         (a) Each invoice for Lump Sum work shall include:

            Date work performed;
            Description of the work performed;
            Direct Costs.

         (b) Each invoice for Fixed Fee work shall include:

            Date work performed;
            Description of the work performed;
            Percent of total work being invoiced;
            Percent of total work completed;
            Direct Costs.

         (c) Each invoice for Time and Materials work shall include:

            Date work performed;
            Description of the work performed;
            Hours worked by personnel classification;
            Rate per personnel classification;
            Total personnel cost by classification; and
            Direct Costs.

      (2) Professional services shall be invoiced in accordance with the following Deliverables Payment Schedule:

Milestone Deliverable Name	Phase	Payment %/ Cumulative %	Payment Amount

Project Scope Document	Initiate (Plan)	5%	$75,000
Project Management Plan	Initiate (Plan)	5%	$75,000
Testing Strategy	Initiate (Plan)	5%	$75,000
User Story and Acceptance Criteria Document	Planning (Analyze)	5%	$75,000
Training Approach Document	Planning (Analyze)	5%	$75,000
Conversion & Integration Approach Document	Planning (Analyze)	5%	$75,000
Completion of Build and the Solution Design Documents	Execution (Design & Build)	15%	$225,000
Functional Unit Testing Sign-Off	Execution (Design & Build)	15%	$225,000
Integration Testing & Sign-Off	Execution (Test)	15%	$225,000
Final Solution User Acceptance Testing & Sign-Off	Execution (Test)	15%	$225,000
Deployment Checklist, Sign Off & First User Live	Execution (Test)	5%	$75,000
Support Period Report	Close Out (Deliver)	5%	$75,000
Total:			$1,5000,000

b. **<u>Reimbursable Expenses: As prescribed in Attachment A</u>**

2. **<u>INVOICING</u>**

a. **<u>Payment Documentation</u>.** As a prerequisite to payment for services, Service Provider shall invoice District for services performed and for reimbursable expenses authorized by this Agreement, accompanied by such records, receipts and forms as required.

b. Service Provider shall include the following information on each invoice submitted for payment by District, in addition to the information required in Section 1, above:

1) Agreement Title
2) If applicable, the Task Authorization(s) (TA) number being charged.
3) The following certification phrase, with printed name, title and signature of Service Provider's project manager or designated representative:

"I certify under penalty of perjury that the above statement is just and correct according to the terms of Document No. ___________, and that payment has not been received."

4) Dates of service provided
5) Date of invoice
6) A unique invoice number

c. District shall, at its discretion, return to Service Provider, without payment, any invoice, which has been submitted without the above information and certification phrase.

d. All invoices shall be sent via email to **IT_Invoices@portofsandiego.org**. Invoices shall also be mailed to the attention of: Kurt Smith, IT Business Partner Manager. San Diego Unified Port District, P.O. Box 120488, San Diego, CA 92112-0488.

e. Should District contest any portion of an invoice, that portion shall be held for resolution, but the uncontested balance shall be processed for payment. District may, at any time, conduct an audit of any and all billing and payment records kept by Service Provider for the Services. Any overpayment discovered in such an audit may be charged against the Service Provider's future invoices and any retention funds.

f. Service Provider shall submit all invoices within thirty (30) days of completion of work represented by the request and within sixty (60) days of incurring costs to be reimbursed under the Agreement. Payment will be made to Service Provider within thirty (30) days after receipt by District of a proper invoice. If payment is not received within thirty (30) days after receipt of an invoice, Service Provider may suspend or terminate the Services.

EXHIBIT A
TASK AUTHORIZATION FORM
San Diego Unified Port District

(DEPARTMENT NAME)
San Diego Unified Port District
P.O. Box 120488
San Diego, CA 92112-0488
(619) 686-____
Fax (619) 725-____

TASK AUTHORIZATION NO. _

(Date)

(Name)
(Title)
(Name of Company)
(Address)
(City, State, Zip)
Email:

Subject: Task Authorization for Agreement No. __- 20__
(Agreement Title)

You are authorized to proceed with the work described in this correspondence, in an amount not to exceed $_____________. This Task Authorization is in accordance with the terms of the subject agreement. **Please cite TA #_** on invoice(s) for this Task.

TASK DESCRIPTION

1.	Requestor:		4.	WBS or IO/ Cost Center:	
2.	Date of Request:		5.	Task Start Date:	
3.	Task Budget:	$	6.	Task End Date:	
7.	**Task Title:**				

8. **Scope of Services.**

9. **Contractor Staffing** (If applicable)

Name	Classification	Hours
	Staff as needed per Agreement rates	

10. **List of Sub-Contractors** (If applicable)

N/A

11. Please acknowledge acceptance of this Task Authorization by signing below and returning via mail to _______________, Contracts Administrator, at the address above.

APPROVALS

Service Provider:

Signature:

Name:

Title:

Firm:

Date:

Project Manager:

Signature:

Name:

Title: Project Manager

Date:

Manager:

Signature:

Name:

Title: Manager

Date:

Director/Chief Engineer:

Signature:

Name:

Title: Director/Chief Engineer

Date:

EXHIBIT B
CERTIFICATE OF INSURANCE
San Diego Unified Port District

By signing this form, the authorized agent or broker ***certifies*** the following:

(1) The Policy or Policies described below have been issued by the noted Insurer(s) [Insurance Company(ies)] to the Insured and is (are) in force at this time.

(2) As required in the Insured's agreement(s) with the District, the policies include, or have been endorsed to include, the coverages or conditions of coverage ***noted on page 2 of this certificate.***

(3) Signed copies of ***all*** endorsements issued to effect require coverages or conditions of coverage are attached to this certificate.

Return this form to: **San Diego Unified Port District**
c/o Ebix BPO
P.O. Box 100085 – 185
Duluth, GA 30096 – OR –
Email: portofsandiego@ebix.com
Fax: 1-866-866-6516

Name and Address of Insured (Consultant)	SDUPD Agreement Number: ____________________ **This certificate applies to all operations of named insureds on District property in connection with all agreements between the District and Insured.**

CO LTR	TYPE OF INSURANCE	POLICY NO.	DATES	LIMITS
	Commercial General Liability ☐ Occurrence Form ☐ Claims-made Form Retro Date __________ ☐ Liquor Liability Deductible/SIR: $_________		**Commencement Date:** **Expiration Date:**	**Each Occurrence:** **$**________________________________ **General Aggregate:** **$**________________________________
	Commercial Automobile Liability ☐ All Autos ☐ Owned Autos ☐ Non-Owned & Hired Autos		**Commencement Date:** **Expiration Date:**	**Each Occurrence:** **$**
	Workers Compensation – Statutory Employer's Liability		**Commencement Date:** **Expiration Date:**	E.L. Each Accident $ E.L. Disease Each Employee $ E.L. Disease Policy Limit $
	Professional Liability ☐ Claims Made Retro-Active Date ______________		**Commencement Date:** **Expiration Date:**	Each Claim $
	Excess/Umbrella Liability		**Commencement Date:** **Expiration Date:**	Each Occurrence: $______________________ General Aggregate:$______________________

CO LTR	COMPANIES AFFORDING COVERAGE	A. M. BEST RATING OR EQUVALENT
A		
B		
C		
D		

A. M. Best Financial Ratings of Insurance Companies Affording Coverage Must be A-VII or better unless approved in writing by the District.

Name and Address of Authorized Agent(s) or Broker(s)	E-mail Address: Phone: Fax Number:
	Signature of Authorized Agent(s) or Broker(s)

Date:

SAN DIEGO UNIFIED PORT DISTRICT

REQUIRED INSURANCE ENDORSEMENT

ENDORSEMENT NO.	EFFECTIVE DATE	POLICY NO.
NAMED INSURED:		
GENERAL DESCRIPTION OF AGREEMENT(S) AND/OR ACTIVITY(IES): All written agreements, contracts and leases with the San Diego Unified Port District and any and all activities or work performed on district premises		

Notwithstanding any inconsistent statement in the policy to which this endorsement is attached or in any endorsement now or hereafter attached thereto, it is agreed as follows:

1. The San Diego Unified Port District, its officers, agents, and employees are additional insureds in relation to those operations, uses, occupations, wrongful acts, and activities described generally above, including activities of the named insured, its officers, agents, employees or invitees, or activities performed on behalf of the named insured specific to Service Provider's wrongful acts or omissions in performance of Services under this Agreement.

2. Insurance under the policy(ies) listed on this endorsement is primary and no other insurance or self-insured retention carried by the San Diego Unified Port District will be called upon to contribute to a loss covered by insurance for the named insured.

3. This endorsement shall include a waiver of transfer of rights of recovery against the San Diego Unified Port District ("Waiver of Subrogation").

4. The policy(ies) listed on this endorsement will apply separately to each insured against whom claim is made or suit is brought except with respect to the limits of the insurer's liability.

5. As respects the policy(ies) listed on this endorsement, with the exception of cancellation due to nonpayment of premium, thirty (30) days written notice will be given to the San Diego Unified Port District prior to the effective date of cancellation unless Service provider obtains replacement coverage meeting the terms and conditions hereunder without lapse. In the event of cancellation due to nonpayment of premium, ten (10) days written notice shall be given.

Except as stated above, and not in conflict with this endorsement, nothing contained herein shall be held to waive, alter or extend any of the limits, agreements or exclusions of the policy(ies) to which this endorsement applies.

____
(NAME OF INSURANCE COMPANY)

____
(SIGNATURE OF INSURANCE COMPANY AUTHORIZED REPRESENTATIVE)

MAIL THIS ENDORSEMENT AND NOTICES OF CANCELLATION:

San Diego Unified Port District, c/o Ebix BPO
P.O. Box 100085 – 185
Duluth, GA 30096 – OR –
Email to: portofsandiego@ebix.com
Fax: 1-866-866-6516