

**ORIGINAL**

**CONTRACT RESULTING FROM REQUEST FOR PROPOSAL NUMBER 10089997-23-C  
Computer Aided Design Drafting Software**

This Contract (Contract) is entered into by and between the City of San Diego, a municipal corporation (City), and the successful proposer to Request for Proposal (RFP) #10089997-23-C, Computer Aided Design Drafting Software (Contractor).

**RECITALS**

On or about 3/8/2023, City issued an RFP to prospective proposers on services to be provided to the City. The RFP and any addenda and exhibit thereto are collectively referred to as the "RFP." The RFP is attached hereto as Exhibit A.

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

City wishes to retain Contractor to provide **Computer Aided Design Drafting Software (CADD)** as further described in the Scope of Work, attached hereto as Exhibit B. (Services).

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

**ARTICLE I  
CONTRACTOR SERVICES**

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

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

**1.3 Contract Administrator.** The Engineering & Capital Projects Department (Department) is the Contract Administrator for this Agreement. Contractor shall provide the Services under the direction of a designated representative of the Department as identified in the Notice to Proceed.

**ARTICLE II  
DURATION OF CONTRACT**

**2.1 Term.** This Contract shall be for a period of five (5) years beginning on the Effective Date. The City may exercise the option by mutual written agreement to extend this Contract for one (1) additional three (3) year period. This option shall be mutually agreed to in writing not less than thirty (30) days prior to expiration of the five year term.

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

## ARTICLE III COMPENSATION

*Kirk M. Fisher* Digitally signed by Kirk M. Fisher  
Date: 2024.04.09 15:40:49 -0400

**3.1 Amount of Compensation.** City shall pay Contractor for performance of all Services rendered in accordance with this Contract in an amount not to exceed **\$13,923,987**.  
*(The not to exceed amount will be added in this final Contract prior to the final execution of the Contract by the City, with the Contractor's initials indicating acceptance.)*

Contractor must immediately inform the City when the cumulative value of work done under this Agreement exceeds eighty percent (80%) of the total compensation authorized in this paragraph, or when it reasonably appears to Contractor that the cumulative value of work done under this Agreement may exceed the total compensation authorized in this paragraph within forty-five (45) days.

## ARTICLE IV WAGE REQUIREMENTS

4.1 Reserved.

## ARTICLE V CONTRACT DOCUMENTS

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

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

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

- 1<sup>st</sup> Any properly executed written amendment to the Contract
- 2<sup>nd</sup> The Contract
- 3<sup>rd</sup> The RFP and the City's written acceptance of any exceptions or clarifications to the RFP, if any

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

5<sup>th</sup> Contractor's Proposal

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

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

*[Remainder of page intentionally left blank]*

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

CONTRACTOR

CITY OF SAN DIEGO  
A Municipal Corporation

DLT Solutions, LLC

Proposer

2411 Dulles Corner Park, Suite 800

Street Address

Herndon, VA 20171

City

800-262-4358

Telephone No.

sales@dlt.com

E-Mail

BY:

Print Name: *Alia Khouri*  
Chief Operating Officer  
General Services Branch  
Deputy Chief Operating Officer

Date Signed

BY:

*Chris Dewey*

Signature of  
Proposer's Authorized  
Representative

Chris Dewey

Print Name

VP - Sales

Title

05/04/2023

Date

Approved as to form this 10<sup>th</sup> day of

July, 2024.  
MARA W. ELLIOTT, City Attorney

BY:

*Dana Gaudin*  
Deputy City Attorney

**Per Addendum D: Completed and signed RFP signature page is required, with most recent addendum listed as acknowledgment of all addenda issued.**

**DLT Solutions Acknowledges the receipt of the following Addenda:**

- Addendum A
- Addendum B
- Addendum C
- Addendum D

**EXHIBIT A  
PROPOSAL SUBMISSION AND REQUIREMENTS**

**A. PROPOSAL SUBMISSION**

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

**1.1 Reserved.**

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

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

**1.4 Pre-Proposal Conference.** No pre-proposal conference will be held for this RFP.

**1.4.1 Reserved.**

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

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

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

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

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

**2.2 Exceptions requested by proposer, if any.** Proposers must list or reference each specific exception they are requesting to the Scope of Work, the Contract, or the

Exhibits thereto. For each requested exception, proposers must provide proposed alternative or amended language in their initial proposal submittal for potential consideration. The proposer must also present written factual or legal justification for any exception requested to the Scope of Work, the Contract, or the Exhibits thereto.

It is not acceptable for proposers to take exception to terms or conditions in general, with a request to later discuss or negotiate specific terms within the RFP / Contract. Nor is it acceptable to refer to other contracts for alternative language. The City will not consider exceptions addressed elsewhere in the proposal, nor will the City consider exceptions for which no specific alternative or amended language is provided.

Any exceptions to the Contract that have not been accepted by the City in writing are deemed rejected. The City, in its sole discretion, may accept some or all of proposer's exceptions, reject proposer's exceptions and deem the proposal nonresponsive, or award the Contract without proposer's proposed exceptions.

**2.3 The Contractor Standards Pledge of Compliance Form.**

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

**2.5 Reserved.**

**2.6 Reserved.**

**2.7 Reserved.**

**2.8 Additional Information as required in Exhibit B.**

**2.9 Reserved.**

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

**2.10 A title page.**

**2.11 A table of contents.**

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

**2.13 Proposer's response to the RFP, including the following exhibits.**

**2.13.1 Exhibit D Pricing Proposal.**

**2.13.2 Exhibit E Functional Requirements.**

**2.13.3 Exhibit F Interrogatories.**

**2.13.4 Exhibit G IT Mandatory Requirements.**

**2.14** An additional redacted version of Proposer's response to the RFP containing redactions of confidential, proprietary or other information which proposer alleges to be exempt from disclosure under the California Public Records Act, including the legal basis for such exemption, as fully set forth in Section 9. Public Records below.

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

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

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

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

**6. Reserved.**

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

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

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

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

**9. Public Records.** By submitting a proposal, the proposer acknowledges that any information submitted in response to this RFP is a public record subject to disclosure unless the City determines that a specific exemption in the California Public Records Act (CPRA) applies. If the proposer considers any part of its proposal confidential, proprietary or otherwise exempt from disclosure under the CPRA, the City may protect such information and treat it with confidentiality to the extent permitted by law, however proposer must also submit a redacted version of the proposal including specific legal exemptions at the time of proposal submittal. It will be the responsibility of the proposer to provide to the City the specific legal grounds on which the City can rely in withholding information requested under the CPRA should the City choose to withhold such information. General references to sections of the CPRA will not suffice. Rather, the proposer must provide a specific and detailed legal basis, including applicable case law, that clearly establishes the requested information is exempt from the disclosure under the CPRA. If the proposer does not provide a specific and detailed legal basis for requesting the City to withhold proposer's confidential or proprietary information at the time of proposal submittal, City will release the information as required by the CPRA and proposer will hold the City, its elected officials, officers, and employees harmless for release of this information. It will be the proposer's obligation to defend, at proposer's expense, any legal actions or challenges seeking to obtain from the City any information requested under the CPRA withheld by the City at the proposer's request.

Furthermore, the proposer shall indemnify and hold harmless the City, its elected officials, officers, and employees from and against any claim or liability, and defend any action brought against the City, resulting from the City's refusal to release information requested under the CPRA which was withheld at proposer's request.

Nothing in the Contract resulting from this proposal creates any obligation on the part of the City to notify the proposer or obtain the proposer's approval or consent before releasing information subject to disclosure under the CPRA.

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

## **B. PRICING**

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

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

For example, if the lowest total estimated contract price of all proposals is \$100, that proposal would receive the maximum allowable points for the price category. If the total estimated contract price of another proposal is \$105 and the maximum allowable points is 60 points, then that proposal would receive  $(1 - ((105 - 100) / 100)) \times 60 = 57$  points, or 95% of the maximum points. The lowest score a proposal can receive for this category is zero points



(the score cannot be a negative number). The City will perform this calculation for each Proposal.

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

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

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

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

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

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

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

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

#### **3.2 Reserved.**

**3.3 Mandatory Interview/ Oral Presentation/ Demonstration.** The City will require proposers to interview and/or make an oral presentation/ demonstration if they are the highest score or one or more proposals score within fifteen (15) points or less of the proposal with the highest score. Only the proposer with the highest scoring proposal and those proposers scoring within fifteen (15) points or less of the highest scoring proposal will be asked to interview and/or make an oral presentation/ demonstration. Interviews and/or oral presentations/demonstrations will be made to the Evaluation Committee in order to demonstrate the solution, clarify the proposals, and to answer any questions. The interviews and/or oral presentations/demonstrations will be scored as part of the selection process. Additionally, the Evaluation Committee may require proposer's key personnel to interview.

Interviews may be by telephone, via Teams or Zoom, and/or in person. Multiple interviews may be required. Proposers are required to complete their oral presentation and/or interviews/ demonstrations within seven (7) workdays after the City's request. Proposers should be prepared to discuss and substantiate any of the areas of the proposal submitted, as well as proposer's qualifications to furnish the subject goods and services. Proposer is responsible for any costs incurred for the oral presentation and interview of the key personnel.

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

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

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

	MAXIMUM EVALUATION POINTS
<b>A. Responsiveness to the RFP Functional and IT Mandatory Requirements.</b>	35
1. Conformity of the proposed product to the City functional and applicable IT mandatory requirements	
2. Minimal or limited customization to Proposer's software proposed solution	
3. Technical aspects	
4. Risk Profile (e.g., exception requests)	
<b>B. CADD Project Approach, Maintenance, Support &amp; Training.</b>	25
1. Project Management Plan effectiveness and efficiency	
2. Project Timeline Implementation Strategy	
3. Staffing and Project Organization clarity and structure	
4. Migration Strategy effectiveness and the ability to maintain uninterrupted operations	
5. Approach to Training, Customer Support, and Ongoing Development Services	

MAXIMUM  
EVALUATION  
POINTS

**C. Experience**

15

1. Proposer's previous background and experience in providing CADD application services in similar size and scope

**D. Price**

10

**E. Mandatory Interview/Oral Presentation (if held pursuant to Section 3.3 above) at no cost to the City.**

15

1. Demonstrate in real time that your program meets the requirements of the RFP
2. Demonstrate the functions described in the RFP
3. Thoroughness and clarity of presentation

SUB TOTAL MAXIMUM EVALUATION POINTS:

100

**F. Participation by Small Local Business Enterprise (SLBE) or Emerging Local Business Enterprise (ELBE) Firms\***

12

FINAL MAXIMUM EVALUATION POINTS INCLUDING SLBE/ELBE:

112

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

**D. ANNOUNCEMENT OF AWARD**

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

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

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

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

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

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

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

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

**4. Reserved.**

**5. Reserved.**

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

## **EXHIBIT B SCOPE OF WORK**

### **A. Background**

1. The City of San Diego (City) Engineering & Capital Projects (E&CP) Department currently utilizes Bentley Systems Computer Aided Design and Drafting (CADD) applications to analyze, design, plan, and construct engineering projects for the City's Capital Improvements Program (CIP). The City provides CADD software applications to over 325 CADD users citywide that are dependent on the applications and workflows of CIP projects.
2. Bentley System provides the City with ProjectWise, Microstation, Open Roads Designer Suite, FlowMaster and a host of other applications tools for modeling, drafting and other engineering designing functions. These software's are used by various City Departments, especially in Engineering & Capital Projects, Storm Water, Environmental Services, Public Utilities and Transportation Departments to create detailed engineering plans and specifications for construction projects that are utilized by architects, engineers, geospatial professionals, contractors, and consultants. Engineers and drafting classifications are dependent on the applications and workflows for planning, design and construction of CIP projects.
3. The City's overall goal is to have an effective and sustainable CADD solution that includes cloud data storage, maintenance, support, training, standards customizations and data configurations of engineering applications. The CADD applications will need to address Civil, Architectural, and other engineering related aspects in order to plan, design and construct all assets in order to support the CIP.

### **B. Specifications**

1. This application suite will require maintenance, support, training, cloud storage, application configuration, customizations, packing deployments, and geospatial configuration for plan and profiles views of construction drawings for various assets which includes Water, Sewer, Storm Water, Drainage, Treatment Plants, Pump Stations, Parks, Public Buildings, Airport Facilities, Recreation Facilities, Reservoirs, Dams, Bridges, Signals, Street Lights, Rail, Utilities Undergrounding, Streets and Traffic related projects.
2. The application suite requires Cloud Hosting/ Software as a Service (SaaS) storage along with development and production environments. This database storage will need to include versioning, check-in and check-out functionality, information sharing capabilities with a minimum of 10TB of optimum storage space with the ability to add space, as needed. The database environment will also require a collaboration server, configuration of CADD standards, resources, and managed workspaces for environments.

3. A data migration and conversion process of existing file formats will be required to convert files into the new format extensions. This effort will be critical part of implementation phase and files will need to be reviewed and tested to ensure conversions are accurate and data has been converted correctly with no errors or corruption during data migration.

4. The engineering design applications will need to have a dedicated print/ plot module for large scale plotting and provide customized pen, black & white and color table selections for all printing/ plotting sizes. The software must be able to incorporate high resolution orthophotography and photogrammetry from various file extensions, Microsoft Office Suite applications, Adobe products etc. The application will need to provide customization to the plan and profile views and support 2D and 3D drafting models, cells, line styles, weights, and colors. This application software will also require automated sheet creation, profiling, design cell templates, conflict resolution detections, scaling, hydraulic calculation functionality and integration to data collectors for importing and exporting data points.

5. The Contractor will need to refer to City of San Diego – Department of Information Technology (DoIT) FY23-27 IT Strategic Plan to assess any mitigation and transition needs. The contractor will also need to provide tools for creating application packages to end-user's computers. The applications will need to be compatible with third party applications such as TranSoft-AutoTurn, Trimble, CorpsCon, FloMonster, Axiom, DAT/EM Photogrammetry, StarNET and other engineering related applications.

### **C. Training**

1. The Contractor will need to provide onsite and virtual trainings of all new applications to all City of San Diego CADD Users and Subject Matter Experts (SME's). On-going training and train the trainer instructions will be required to ensure CADD users have the knowledge and skillset available to be productive in the new software.

2. Training Strategy & Recommended Training Plan: Contractor shall have an outline and describe the appropriate training for the Project Team as Administrators and Trainers as well as End Users based on the requirements in this proposal. The plan must include training materials (e.g., user manuals) and be reflected in the training costs for this proposal. The manuals must be routinely updated as policies or programs are upgraded. These manuals can also be electronic. Training will begin no later than thirty (30) calendar days after the solution is installed and accepted by the City. The City prefers virtual training due to the number of personnel, however the City will also want the option for on-site training. Please describe details of the types of training provided as well as training documents. Indicate if the training is provided as part of this proposal or available as part of continuing support.

3. Responsive proposals should provide straightforward, concise information that satisfies the requirements noted herein. Emphasis should be placed on conformity to the requirements of this RFP (with only limited exceptions requested), completeness of the proposal, and clarity of content. Any false or misleading statements found in the proposal may be grounds for disqualification.

#### **D. SUPPORT SERVICES.**

1. The Contractor shall provide on-going, comprehensive support for day-to-day operations and maintenance. The contractor shall provide on-site and virtual support services to facilitate enhancements, customizations, configurations, troubleshooting and deployment of the CADD applications. These resources must be available during core business days, Monday through Friday - 6:00 a.m. to 6:00 p.m. (Pacific Time) at multiple locations.
2. The contractor will be responsible for creating application packages and deployments utilizing the City's System Center Configuration Manager (SCCM) deployment packaging system. This will also include providing exemption reports for those applications that failed.

#### **E. PRODUCT LICENSES.**

1. System User Software License Agreements. Contractor shall provide a copy of all System User software license agreements they will be requesting the City to execute. The license agreements should address all software components including third-party software, base system software provided by the Contractor, and custom software developed specifically for this project. The software license agreements provided should be the actual documents (or exact duplicates) of the forms used for this project, not a typical sample document.
  - a. Licensing Model. Contractor shall clearly indicate the nature of their Solution's licensing model (i.e., Named User, Concurrent User, Flat Subscription, or volume-based metrics [e.g., transactions, unlimited 'enterprise' style licensing or named licenses]).
  - b. License Transfer. Solution licensing must be easily transferred by a City Administrator, should the need occur (e.g., member of staff leaves the organization).
  - c. Licensing Volume Changes. Solution must allow the City to increase or decrease its licensing requirements through the duration of the contract.
  - d. Unused Licensing Volume. Solution must allow the City to 'roll-over' unused licensing (e.g., transactions into subsequent contract terms, should the City choose to exercise its right to extend the Contract term).
  - e. Overage Costs. Solution must clearly describe the circumstances and thresholds (if any) under which the City may become liable for overage costs (e.g., exceeding bandwidth, storage, transactions, etc.).
  - f. Not-to-Diminish Rights. Any resulting agreement between the City and Contractor will ensure that the functionalities of the solution purchased, irrespective of whether it has been purchased as a set of more than one software product supplied as a single price, will be retained for the duration of the agreement, inclusive of any agreed extensions. Any resulting incremental unitary purchases of software will be made against the same software originally purchased under this agreement.

g. **Third Party Use.** Contractor will grant City a non-exclusive license during the Contract Term to install and/or execute solution on machines operated by or for City solely to facilitate City's authorized access to and use of the acquired solution. City's primary third-party information technology service providers shall have access to and use of the Solution solely to provide support for City's internal business use.

**F. UPGRADES, UPDATES AND MAINTENANCE.**

1. The contractor will be responsible for providing the City with application version upgrades of CADD applications and updates as needed. The contract is required to provide all application maintenance and they are completed in a timely manner, technical support is available to the City of San Diego applications are on the current version. Contractors shall make available to City all upgrades, updates, and versions to the software, as they are released, at no additional charge. These changes must be scheduled with City in advance to test and communicate out to all affected users.

a. **Scheduled Maintenance.** Contractor will provide 72 hours' notice of any upgrades that require platform down time of over one (1) hour. Scheduled Maintenance will occur only outside of the core City hours of 8am to 5pm PT.

b. Before scheduling any system downtime, Proposer will inquire with the City about the timing and only schedule the downtime upon reaching written agreement with the City about the time and duration.

c. **Hosting Facility Services.** Contractors assumes all responsibility for the computing environment supporting the hosted applications.

d. **Application Administration.** Applications provided under this agreement will be the responsibility of the contractor. Contractor will own and manage the application, related databases, supporting computing software, and necessary operating systems. Data is owned by City of San Diego.

e. **Application Administration.** Applications provided under this agreement will be the responsibility of the contractor. Contractor will own and manage the application, related databases, supporting computing software, and necessary operating systems.

f. **Ownership of Data.** All data collected on behalf of the City of San Diego is the property of the City. None of the data will be used for any other purpose. Upon termination or expiration of any contractual agreement, the Contractor will retain the City's data for a minimum of ninety (90) days and will transfer City data in its possession to the City at no cost by using a method that protects the confidentiality of the information being exchanged and as agreed upon by the City but, at a minimum, data records will be provided in ASCII comma, separated value (CSV) format, with binary images in TIFF, JPG, or PDF format. The City retains the right to test the data extraction process on an annual basis. Upon the expiration of the ninety (90) day period, Contractor and its hosted service provider shall have no obligation to maintain or provide any City data and shall thereafter, unless legally prohibited, delete in such a manner as prevents recovery through normal/laboratory means, all City data in its systems or otherwise in its possession or under its control.



**G. CLOUD HOSTING/ SOFTWARE AS A SERVICE (SaaS)**

1. Contractor shall provide Cloud Hosting/ Software as a Service (SaaS) solution which must be approved by the City of San Diego Cyber Security Team during planning and prior to being implemented.

**H. PROFESSIONAL SERVICES (Project Management, Overall Approach, Training & Support).**

1. Contractors shall provide a project plan for the milestone-based, fixed-price delivery of the implementation services.

a. **Single Point of Contact:** The Contractor must identify a single point of contact for all contract management activities. The Contractor's Project Manager's name and resume must be submitted with the proposal. The successful Contractor must not change the Project Manager without written City approval.

b. **Project Management Plan:** The Contractor must contain a comprehensive and practical description of the Contractor's plans for project management with regards to City staff engagement, implementation of the proposed solution, control mechanisms including staff organizational structure, progress reporting, major decision making, sign-off procedures, and internal control procedures. The Contractor shall also indicate flexibility in meeting changes in program requirements and coping with problems.

c. **Project Timeline:** The Contractor must submit a project plan that meets the needs of the RFP and indicates a thorough understanding of the scope of work as outlined in this RFP. The Contractor must identify realistic person hours of effort and responsibilities for the deliverable and each work activity. Contractors must fully describe each of the key milestones and estimated completion dates. Include the following milestones:

Step 1: Project Kick-Off meeting and presentation of implementation plan.

Step 2: Project preparation and finalization of business requirements.

Step 3: Configuration, interfaces and Data Migration.

Step 4: Application Testing by Proposer.

Step 5: Customer Acceptance Testing.

Step 6: Training.

Step 7: Cut Over and Acceptance.

Step 8: Stabilization Period; and

Step 9: Post-Production Maintenance and Support.

d. **Project Delays:** Proposer must also describe typical project delays when implementing a CADD solution and how project delays will be addressed should they occur. The process for submitting Change Requests, remedying project delays and proposed payment 'holdbacks' for missed milestones should also be detailed. All assurances that sufficient resources and knowledgeable experienced staff are available to meet any of the project schedule must be described.

e. **Scope Management:** Proposer must describe the change control process for scope management. This should include the initiation of any scope changes and subsequent approvals.

f. **Staffing and Project Organization:** The Contractors organization chart must be included with all proposed personnel, including the supervisor level, functional responsibilities, key personnel, and other staff members who will be involved in the project and percentage of time dedicated to

project. Contractor will need to provide resumes of staff to include minimum experience and an executive summary of the primary position. Contractor should describe their commitment to ensuring the composition of the project team will remain consistent throughout the course of the implementation phase. Project team cannot be substituted, or staff added without prior notice and acceptance by the City. Prime Contractor may use subcontractors; however, the Prime Contractor must be the Proposer. All subcontractors must be listed in the Contractor Standards Pledge of Compliance form. If Contractor wishes to bring in a subcontractor for performance under the agreement, the City must approve the subcontractor in writing. The Contractor must also identify key resources located in the San Diego area.

g. **Migration Strategy:** Contractor must describe the migration strategy for this project based on the Bentley Systems database of approximately 10TB. (How would the Proposer determine the best process for moving all past/historical data into the new CADD Software solution?) Detail your methodology for testing/QA and ensuring risk of business disruption is properly mitigated. This migration strategy must be reflected in the migration costs for this proposal. Proposers must describe their experience with migrating these specific database /data types and describe what difficulties may be encountered during migration due to these data types.

h. **Final Application Testing & Acceptance:** Please outline and describe the acceptance testing process that will confirm system operations and ensure that the system meets all functional requirements as outlined in this RFP.

i. **Transition Plan:** Please outline and describe the proposed transition plan that ensures proposed solution has been validated and tested and have obtained the City's final acceptance that the Proposer is prepared to deliver all services to the requirements described in the Agreement.

k. **Levels of Support:** Please describe in detail the levels of support provided for this solution and how they align with the City's requirements. In this description, please include the terms of the support and the services provided. The support level pricing must be reflected in the cost proposal. If there are saving opportunities, please provide additional options as available.

**I. CONTRACT ADMINISTRATOR.** The Department Representative for this Contract is identified in the notice of award and is responsible for overseeing and monitoring this Contract.

**J. FUNCTIONAL REQUIREMENTS RESPONSE TEMPLATE (EXHIBIT E)**

The City has provided potential technical requirements for the proposed solution as shown in the Functional Requirements matrix. Proposers are required to indicate whether their solution meets City requirements, to what extent it meets City requirements, and to what extent modifications or customizations are required.

All requirements identified with a "Fully Compliant" response shall be assumed to be available in an 'Out of-the-Box' format at the time of RFP submittal (i.e., beyond release candidate and beta testing). Proposer must describe how the proposed solution is fully compliant in the "Comments" section. All requirements identified with a "Partially Compliant" response shall require further explanation from the Proposer in the "Comments" section. If there are costs associated with making the requirement fully compliant, please provide the associated details and costs. If the Proposer fails to provide an

accompanying elaboration for the “Partially Compliant” status, the City shall consider the requirement to be “Not Compliant”. All requirements identified with a “Not Compliant” response shall be assumed to mean that the Proposer cannot or will not be able to meet this requirement without further customization or development of their product. All requirements identified with a “N/A” response shall also require further explanation from the Proposer in the “Comments” section.

**EXHIBIT C**



**THE CITY OF SAN DIEGO**

**GENERAL CONTRACT TERMS AND PROVISIONS**

**APPLICABLE TO GOODS, SERVICES, AND CONSULTANT CONTRACTS**

**ARTICLE I  
SCOPE AND TERM OF CONTRACT**

**1.1 Scope of Contract.** The scope of contract between the City and a provider of goods and/or services (Contractor) is described in the Contract Documents. The Contract Documents are comprised of the Request for Proposal, Invitation to Bid, or other solicitation document (Solicitation); the successful bid or proposal; the letter awarding the contract to Contractor; the City's written acceptance of exceptions or clarifications to the Solicitation, if any; and these General Contract Terms and Provisions.

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

**1.3 Contract Extension.** The City may, in its sole discretion, unilaterally exercise an option to extend the Contract as described in the Contract Documents. In addition, the City may, in its sole discretion, unilaterally extend the Contract on a month-to-month basis following contract expiration if authorized under Charter section 99 and the Contract Documents. Contractor shall not increase its pricing in excess of the percentage increase described in the Contract.

**ARTICLE II  
CONTRACT ADMINISTRATOR**

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

**2.1.1 Contractor Performance Evaluations.** The Contract Administrator will evaluate Contractor's performance as often as the Contract Administrator deems necessary throughout the term of the contract. This evaluation will be based on criteria including the quality of goods or services, the timeliness of performance, and adherence to applicable laws, including prevailing wage and living wage. City will provide Contractors who receive an unsatisfactory rating with a copy of the evaluation and an opportunity to respond. City may consider final evaluations, including Contractor's response, in evaluating future proposals and bids for contract award.

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

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

### ARTICLE III COMPENSATION

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

**3.2 Invoices.**

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

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

**3.2.3 Goods Contracts.** Contractor must submit invoices for goods to City within seven days of the shipment. Invoices must describe the goods provided.

**3.2.4 Parts Contracts.** Contractor must submit invoices for parts to City within seven calendar (7) days of the date the parts are shipped. Invoices must include the manufacturer of the part, manufacturer's published list price, percentage discount applied in accordance with Pricing Page(s), the net price to City, and an item description, quantity, and extension.

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

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

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

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

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

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

#### **ARTICLE IV SUSPENSION AND TERMINATION**

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

**4.2 City's Right to Terminate for Convenience.** City may, at its sole option and for its convenience, terminate all or any portion of this Contract by giving thirty (30) days' written notice of such termination to Contractor. The termination of the Contract shall be effective upon receipt of the notice by Contractor. After termination of all or any portion of the Contract, Contractor shall: (1) immediately discontinue all affected performance (unless the notice directs otherwise); and (2) complete any and all additional work necessary for the orderly filing of

documents and closing of Contractor's affected performance under the Contract. After filing of documents and completion of performance, Contractor shall deliver to City all data, drawings, specifications, reports, estimates, summaries, and such other information and materials created or received by Contractor in performing this Contract, whether completed or in process. By accepting payment for completion, filing, and delivering documents as called for in this section, Contractor discharges City of all of City's payment obligations and liabilities under this Contract with regard to the affected performance.

**4.3 City's Right to Terminate for Default.** Contractor's failure to satisfactorily perform any obligation required by this Contract constitutes a default. Examples of default include a determination by City that Contractor has: (1) failed to deliver goods and/or perform the services of the required quality or within the time specified; (2) failed to perform any of the obligations of this Contract; and (3) failed to make sufficient progress in performance which may jeopardize full performance.

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

**4.3.2** If City terminates this Contract, in whole or in part, City may procure, upon such terms and in such manner as the Purchasing Agent may deem appropriate, equivalent goods or services and Contractor shall be liable to City for any excess costs. Contractor shall also continue performance to the extent not terminated.

**4.4 Termination for Bankruptcy or Assignment for the Benefit of Creditors.** If Contractor files a voluntary petition in bankruptcy, is adjudicated bankrupt, or makes a general assignment for the benefit of creditors, the City may at its option and without further notice to, or demand upon Contractor, terminate this Contract, and terminate each and every right of Contractor, and any person claiming rights by and through Contractor under this Contract.

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

**4.5.1 Termination for Convenience.** If the termination is for the convenience of City an equitable adjustment in the Contract price shall be made. No amount shall be allowed for anticipated profit on unperformed services, and no amount shall be paid for an as needed contract beyond the Contract termination date.

**4.5.2 Termination for Default.** If, after City gives notice of termination for failure to fulfill Contract obligations to Contractor, it is determined that Contractor had not so failed, the termination shall be deemed to have been effected for the convenience of City. In such event, adjustment in the Contract price shall be made as provided in Section 4.3.2. City's rights and remedies are in addition to any other rights and remedies provided by law or under this Contract.



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

## ARTICLE V ADDITIONAL CONTRACTOR OBLIGATIONS

**5.1 Inspection and Acceptance.** The City will inspect and accept goods provided under this Contract at the shipment destination unless specified otherwise. Inspection will be made and acceptance will be determined by the City department shown in the shipping address of the Purchase Order or other duly authorized representative of City.

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

**5.3 Responsibility for Damages.** Contractor is responsible for all damage that occurs as a result of Contractor's fault or negligence or that of its' employees, agents, or representatives in connection with the performance of this Contract. Contractor shall immediately report any such damage to people and/or property to the Contract Administrator.

**5.4 Delivery.** Delivery shall be made on the delivery day specified in the Contract Documents. The City, in its sole discretion, may extend the time for delivery. The City may order, in writing, the suspension, delay or interruption of delivery of goods and/or services.

**5.5 Delay.** Unless otherwise specified herein, time is of the essence for each and every provision of the Contract. Contractor must immediately notify City in writing if there is, or it is anticipated that there will be, a delay in performance. The written notice must explain the cause for the delay and provide a reasonable estimate of the length of the delay. City may terminate this Contract as provided herein if City, in its sole discretion, determines the delay is material.

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

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

**5.7 Warranties.** All goods and/or services provided under the Contract must be warranted by Contractor or manufacturer for at least twelve (12) months after acceptance by City, except automotive equipment. Automotive equipment must be warranted for a minimum of 12,000 miles or 12 months, whichever occurs first, unless otherwise stated in the Contract. Contractor is responsible to City for all warranty service, parts, and labor. Contractor is required to ensure that warranty work is performed at a facility acceptable to City and that services, parts, and labor are available and provided to meet City's schedules and deadlines. Contractor may establish a warranty service contract with an agency satisfactory to City instead of performing the warranty service itself. If Contractor is not an authorized service center and causes any damage to equipment being serviced, which results in the existing warranty being voided, Contractor will be liable for all costs of repairs to the equipment, or the costs of replacing the equipment with new equipment that meets City's operational needs.

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

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

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

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

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

**5.12 Safety Data Sheets.** If specified by City in the solicitation or otherwise required by this Contract, Contractor must send with each shipment one (1) copy of the Safety Data Sheet (SDS) for each item shipped. Failure to comply with this procedure will be cause for immediate termination of the Contract for violation of safety procedures.

**5.13 Project Personnel.** Except as formally approved by the City, the key personnel identified in Contractor's bid or proposal shall be the individuals who will actually complete the work. Changes in staffing must be reported in writing and approved by the City.

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

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

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

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

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

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

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

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

## **ARTICLE VI INTELLECTUAL PROPERTY RIGHTS**

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

**6.2 Intellectual Property Rights Assignment.** For no additional compensation, Contractor hereby assigns to City all of Contractor's rights, title, and interest in and to the content of the Deliverable Materials created by Contractor or its employees, agents, or subcontractors, including copyrights, in connection with the services performed under this Contract. Contractor

shall promptly execute and deliver, and shall cause its employees, agents, and subcontractors to promptly execute and deliver, upon request by the City or any of its successors or assigns at any time and without further compensation of any kind, any power of attorney, assignment, application for copyright, patent, trademark or other intellectual property right protection, or other papers or instruments which may be necessary or desirable to fully secure, perfect or otherwise protect to or for the City, its successors and assigns, all right, title and interest in and to the content of the Deliverable Materials. Contractor also shall cooperate and assist in the prosecution of any action or opposition proceeding involving such intellectual property rights and any adjudication of those rights.

**6.3 Contractor Works.** Contractor Works means tangible and intangible information and material that: (a) had already been conceived, invented, created, developed or acquired by Contractor prior to the effective date of this Contract; or (b) were conceived, invented, created, or developed by Contractor after the effective date of this Contract, but only to the extent such information and material do not constitute part or all of the Deliverable Materials called for in this Contract. All Contractor Works, and all modifications or derivatives of such Contractor Works, including all intellectual property rights in or pertaining to the same, shall be owned solely and exclusively by Contractor.

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

**6.5 Intellectual Property Warranty and Indemnification.** Contractor represents and warrants that any materials or deliverables, including all Deliverable Materials, provided under this Contract are either original, or not encumbered, and do not infringe upon the copyright, trademark, patent or other intellectual property rights of any third party, or are in the public domain. If Deliverable Materials provided hereunder become the subject of a claim, suit or allegation of copyright, trademark or patent infringement, City shall have the right, in its sole discretion, to require Contractor to produce, at Contractor's own expense, new non-infringing materials, deliverables or works as a means of remedying any claim of infringement in addition to any other remedy available to the City under law or equity. Contractor further agrees to indemnify, defend, and hold harmless the City, its officers, employees and agents from and against any and all claims, actions, costs, judgments or damages, of any type, alleging or threatening that any Deliverable Materials, supplies, equipment, services or works provided under this contract infringe the copyright, trademark, patent or other intellectual property or proprietary rights of any third party (Third Party Claim of Infringement). If a Third Party Claim

of Infringement is threatened or made before Contractor receives payment under this Contract, City shall be entitled, upon written notice to Contractor, to withhold some or all of such payment.

**6.6 Software Licensing.** Contractor represents and warrants that the software, if any, as delivered to City, does not contain any program code, virus, worm, trap door, back door, time or clock that would erase data or programming or otherwise cause the software to become inoperable, inaccessible, or incapable of being used in accordance with its user manuals, either automatically, upon the occurrence of licensor-selected conditions or manually on command. Contractor further represents and warrants that all third party software, delivered to City or used by Contractor in the performance of the Contract, is fully licensed by the appropriate licensor.

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

**6.8 Royalties, Licenses, and Patents.** Unless otherwise specified, Contractor shall pay all royalties, license, and patent fees associated with the goods that are the subject of this solicitation. Contractor warrants that the goods, materials, supplies, and equipment to be supplied do not infringe upon any patent, trademark, or copyright, and further agrees to defend any and all suits, actions and claims for infringement that are brought against the City, and to defend, indemnify and hold harmless the City, its elected officials, officers, and employees from all liability, loss and damages, whether general, exemplary or punitive, suffered as a result of any actual or claimed infringement asserted against the City, Contractor, or those furnishing goods, materials, supplies, or equipment to Contractor under the Contract.

## ARTICLE VII INDEMNIFICATION AND INSURANCE

**7.1 Indemnification.** To the fullest extent permitted by law, Contractor shall defend (with legal counsel reasonably acceptable to City), indemnify, protect, and hold harmless City and its elected officials, officers, employees, agents, and representatives (Indemnified Parties) from and against any and all claims, losses, costs, damages, injuries (including, without limitation, injury to or death of an employee of Contractor or its subcontractors), expense, and liability of every kind, nature and description (including, without limitation, incidental and consequential damages, court costs, and litigation expenses and fees of expert consultants or expert witnesses incurred in connection therewith and costs of investigation) that arise out of, pertain to, or relate to, directly or indirectly, in whole or in part, any goods provided or performance of services under this Contract by Contractor, any subcontractor, anyone directly or indirectly employed by either of them, or anyone that either of them control. Contractor's duty to defend, indemnify, protect and hold harmless shall not include any claims or liabilities arising from the sole negligence or willful misconduct of the Indemnified Parties.

**7.2 Insurance.** Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or

in connection with the performance of the work hereunder and the results of that work by Contractor, his agents, representatives, employees or subcontractors.

Contractor shall provide, at a minimum, the following:

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

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

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

**7.2.4 Technology Professional Liability Errors and Omissions Insurance** appropriate to the Consultant's profession and work hereunder, with limits not less than \$2,000,000 per occurrence. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by the Vendor in this agreement and shall include, but not be limited to, claims involving security breach, system failure, data recovery, business interruption, cyber extortion, social engineering, infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, and alteration of electronic information. The policy shall provide coverage for breach response costs, regulatory fines and penalties.

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

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

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

20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used).

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

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

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

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

**7.3 Self Insured Retentions.** Self-insured retentions must be declared to and approved by City. City may require Contractor to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or City.

**7.4 Acceptability of Insurers.** Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A-VI, unless otherwise acceptable to City.

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

**7.5 Verification of Coverage.** Contractor shall furnish City with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by City before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive Contractor's obligation to provide them. City reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

General Contract Terms and Provisions

Revised: January 16, 2020

OCA Document No. 1685454\_2



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

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

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

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

## **ARTICLE VIII BONDS**

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

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

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

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

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

and effect as required under this Contract, will be a material breach of the Contract subject to termination of the Contract.

**8.2 Alternate Security.** City may, at its sole discretion, accept alternate security in the form of an endorsed certificate of deposit, a money order, a certified check drawn on a solvent bank, or other security acceptable to the Purchasing Agent in an amount equal to the required Bond.

## **ARTICLE IX CITY-MANDATED CLAUSES AND REQUIREMENTS**

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

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

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

### **9.1.3 Non-Discrimination Requirements.**

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

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

in Contract termination, debarment, or other sanctions. Contractor shall ensure that this language is included in contracts between Contractor and any subcontractors, vendors and suppliers.

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

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

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

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

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

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

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

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

**9.1.9 Product Endorsement.** Contractor shall comply with Council Policy 000-41 which requires that other than listing the City as a client and other limited endorsements, any advertisements, social media, promotions or other marketing referring to the City as a user of a product or service will require prior written approval of the Mayor or designee. Use of the City Seal or City logos is prohibited.

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

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

**9.1.11.1 Contractor and Subcontract Requirement.** The Equal Pay Ordinance applies to any subcontractor who performs work on behalf of a Contractor to the same extent as it would apply to that Contractor. Any Contractor subject to the Equal Pay Ordinance shall require all of its subcontractors to certify compliance with the Equal Pay Ordinance in its written subcontracts.

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

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

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

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

**10.4 Certification of Non-Collusion.** Contractor certifies that: (1) Contractor's bid or proposal was not made in the interest of or on behalf of any person, firm, or corporation not identified; (2) Contractor did not directly or indirectly induce or solicit any other bidder or proposer to put in a sham bid or proposal; (3) Contractor did not directly or indirectly induce or

solicit any other person, firm or corporation to refrain from bidding; and (4) Contractor did not seek by collusion to secure any advantage over the other bidders or proposers.

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

## **ARTICLE XI DISPUTE RESOLUTION**

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

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

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

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

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

## **ARTICLE XII MANDATORY ASSISTANCE**

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

attending mediations, arbitrations, depositions, trials or any event related to the dispute resolution and/or litigation.

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

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

### **ARTICLE XIII MISCELLANEOUS**

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

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

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

**13.4 Subcontractors.** All persons assigned to perform any work related to this Contract, including any subcontractors, are deemed to be employees of Contractor, and Contractor shall be directly responsible for their work.

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

**13.6 Compliance with Controlling Law.** Contractor shall comply with all applicable local, state, and federal laws, regulations, and policies. Contractor's act or omission in violation of applicable local, state, and federal laws, regulations, and policies is grounds for contract

termination. In addition to all other remedies or damages allowed by law, Contractor is liable to City for all damages, including costs for substitute performance, sustained as a result of the violation. In addition, Contractor may be subject to suspension, debarment, or both.

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

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

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

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

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

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

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

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

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

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

**13.17 Insolvency.** If Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary, Contractor agrees to furnish, by certified mail or electronic commerce method authorized by the Contract, written notification of the bankruptcy to the Purchasing Agent and the Contract Administrator responsible for administering the Contract. This notification shall be furnished within five (5) days of the initiation of the proceedings relating to bankruptcy filing. This notification shall include the date on which the bankruptcy petition was filed, the identity of the court in which the bankruptcy petition was filed, and a listing of City contract numbers and contracting offices for all City contracts against which final payment has not been made. This obligation remains in effect until final payment is made under this Contract.

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

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



**City of San Diego**  
**CONTRACTOR STANDARDS**  
**Pledge of Compliance**

The City of San Diego has adopted a Contractor Standards Ordinance (CSO) codified in section 22.3004 of the San Diego Municipal Code (SDMC). The City of San Diego uses the criteria set forth in the CSO to determine whether a contractor (bidder or proposer) has the capacity to fully perform the contract requirements and the business integrity to justify the award of public funds. This completed Pledge of Compliance signed under penalty of perjury must be submitted with each bid and proposal. If an informal solicitation process is used, the bidder must submit this completed Pledge of Compliance to the City prior to execution of the contract. All responses must be typewritten or printed in ink. If an explanation is requested or additional space is required, Contractors must provide responses on Attachment A to the Pledge of Compliance and sign each page. Failure to submit a signed and completed Pledge of Compliance may render a bid or proposal non-responsive. In the case of an informal solicitation or cooperative procurement, the contract will not be awarded unless a signed and completed Pledge of Compliance is submitted. A submitted Pledge of Compliance is a public record and information contained within will be available for public review except to the extent that such information is exempt from disclosure pursuant to applicable law.

By signing and submitting this form, the contractor is certifying, to the best of their knowledge, that the contractor and any of its Principals have not within a five (5) year period – preceding this offer, been convicted of or had a civil judgement rendered against them for commission of a fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State or local) contract or subcontract.

"Principal" means an officer, director, owner, partner or a person having primary management or supervisory responsibilities within the firm. The Contractor shall provide immediate written notice to the Procurement Contracting Officer handling the solicitation, at any time prior to award should they learn that this Representations and Certifications was inaccurate or incomplete.

**This form contains 10 pages, additional information may be submitted as part of *Attachment A*.**

**A. BID/PROPOSAL/SOLICITATION TITLE:**

Request for Proposal (RFP) for Computer Aided Design Drafting Software

Solicitation Number: 10089997-23-C

**B. BIDDER/PROPOSER INFORMATION:**

DLT Solution, LLC

Legal Name	Herndon	DBA	
2411 Dulles Corner Park, STE 800	City	VA	20171
Street Address	City	State	Zip
William Rucker, Account Manager	(800) 262-8358		
Contact Person, Title	Phone	Fax	

Provide the name, identity, and precise nature of the interest\* of all persons who are directly or indirectly involved\*\* in this proposed transaction (SDMC § 21.0103). Use additional pages if necessary.

\* The precise nature of the interest includes:

- the percentage ownership interest in a party to the transaction,
- the percentage ownership interest in any firm, corporation, or partnership that will receive funds from the transaction,
- the value of any financial interest in the transaction,
- any contingent interest in the transaction and the value of such interest should the contingency be satisfied, and
- any philanthropic, scientific, artistic, or property interest in the transaction.

\*\* Directly or indirectly involved means pursuing the transaction by:

- communicating or negotiating with City officers or employees,
- submitting or preparing applications, bids, proposals or other documents for purposes of contracting with the City, or
- directing or supervising the actions of persons engaged in the above activity.

DLT Solutions, LLC

Name	Title/Position
Herndon, VA	
City and State of Residence	Employer (if different than Bidder/Proposer)
Principal Prime Bidder/Proposer	
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Name	Title/Position
City and State of Residence	Employer (if different than Bidder/Proposer)
Interest in the transaction	

**C. OWNERSHIP AND NAME CHANGES:**

1. In the past five (5) years, has your firm changed its name?  
 Yes       No

If **Yes**, use Attachment A to list all prior legal and DBA names, addresses, and dates each firm name was used. Explain the specific reasons for each name change.

2. Is your firm a non-profit?  
 Yes       No

If **Yes**, attach proof of status to this submission.

3. In the past five (5) years, has a firm owner, partner, or officer operated a similar business?  
 Yes       No

If **Yes**, use Attachment A to list names and addresses of all businesses and the person who operated the business. Include information about a similar business only if an owner, partner, or officer of your firm holds or has held a similar position in another firm.

**D. BUSINESS ORGANIZATION/STRUCTURE:**

Indicate the organizational structure of your firm. Fill in only one section on this page. Use Attachment A if more space is required.

**Corporation** Date incorporated: \_\_\_\_\_ State of incorporation: \_\_\_\_\_

List corporation's current officers: President: \_\_\_\_\_  
 Vice Pres: \_\_\_\_\_  
 Secretary: \_\_\_\_\_  
 Treasurer: \_\_\_\_\_

Type of corporation: C  Subchapter S

Is the corporation authorized to do business in California:  Yes       No

If **Yes**, after what date: \_\_\_\_\_

Is your firm a publicly traded corporation?  Yes  No

If Yes, how and where is the stock traded? \_\_\_\_\_

If Yes, list the name, title and address of those who own ten percent (10 %) or more of the corporation's stocks:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do the President, Vice President, Secretary and/or Treasurer of your corporation have a third party interest or other financial interests in a business/enterprise that performs similar work, services or provides similar goods?  Yes  No

If Yes, please use Attachment A to disclose.

Please list the following:	Authorized	Issued	Outstanding
a. Number of voting shares:	_____	_____	_____
b. Number of nonvoting shares:	_____	_____	_____
c. Number of shareholders:			_____
d. Value per share of common stock:		Par	\$ _____
		Book	\$ _____
		Market	\$ _____

**Limited Liability Company** Date formed: 08/15/1991 State of formation: VA

List the name, title and address of members who own ten percent (10%) or more of the company:

Tech Data Corporation (100%)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Partnership** Date formed: \_\_\_\_\_ State of formation: \_\_\_\_\_

List names of all firm partners:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Sole Proprietorship** Date started: \_\_\_\_\_

List all firms you have been an owner, partner or officer with during the past five (5) years. Do not include ownership of stock in a publicly traded company:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Joint Venture** Date formed: \_\_\_\_\_

List each firm in the joint venture and its percentage of ownership:

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**Note:** To be responsive, each member of a Joint Venture or Partnership must complete a separate *Contractor Standards form*.

**E. FINANCIAL RESOURCES AND RESPONSIBILITY:**

1. Is your firm preparing to be sold, in the process of being sold, or in negotiations to be sold?

Yes  No

If **Yes**, use Attachment A to explain the circumstances, including the buyer's name and principal contact information.

2. In the past five (5) years, has your firm been denied bonding?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances; include bonding company name.

3. In the past five (5) years, has a bonding company made any payments to satisfy claims made against a bond issued on your firm's behalf or a firm where you were the principal?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

4. In the past five (5) years, has any insurance carrier, for any form of insurance, refused to renew the insurance policy for your firm?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

5. Within the last five years, has your firm filed a voluntary petition in bankruptcy, been adjudicated bankrupt, or made a general assignment for the benefit of creditors?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

6. Are there any claims, liens or judgements that are outstanding against your firm?

Yes  No

If **Yes**, please use Attachment A to provide detailed information on the action.

7. Please provide the name of your principal financial institution for financial reference. By submitting a response to this Solicitation Contractor authorizes a release of credit information for verification of financial responsibility.

Name of Bank: Bank of America

Point of Contact: Dina Scott

Address: 9000 Southside Blvd. Jacksonville, FL 32256

Phone Number: (888) 400-9009

8. By submitting a response to a City solicitation, Contractor certifies that he or she has sufficient operating capital and/or financial reserves to properly fund the requirements identified in the solicitation. At City's request, Contractor will promptly provide to City

a copy of Contractor's most recent balance sheet and/or other necessary financial statements to substantiate financial ability to perform.

- 9. In order to do business in the City of San Diego, a current Business Tax Certificate is required. Business Tax Certificates are issued by the City Treasurer's Office. If you do not have one at the time of submission, one must be obtained prior to award.

Business Tax Certificate No.: B2020009334 Year Issued: 2020

**F. PERFORMANCE HISTORY:**

- 1. In the past five (5) years, has your firm been found civilly liable, either in a court of law or pursuant to the terms of a settlement agreement, for defaulting or breaching a contract with a government agency?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

- 2. In the past five (5) years, has a public entity terminated your firm's contract for cause prior to contract completion?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances and provide principal contact information.

- 3. In the past five (5) years, has your firm entered into any settlement agreement for any lawsuit that alleged contract default, breach of contract, or fraud with or against a public entity?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

- 4. Is your firm currently involved in any lawsuit with a government agency in which it is alleged that your firm has defaulted on a contract, breached a contract, or committed fraud?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

- 5. In the past five (5) years, has your firm, or any firm with which any of your firm's owners, partners, or officers is or was associated, been debarred, disqualified, removed, or otherwise prevented from bidding on or completing any government or public agency contract for any reason?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances.

- 6. In the past five (5) years, has your firm received a notice to cure or a notice of default on a contract with any public agency?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances and how the matter resolved.

- 7. Performance References:

Please provide a minimum of three (3) references familiar with work performed by your firm which was of a similar size and nature to the subject solicitation within the last five (5) years.

Please note that any references required as part of your bid/proposal submittal are in addition to those references required as part of this form.

Company Name: Wisconsin Dept of Transportation

Contact Name and Phone Number: Eric Arneson 608-266-3581

Contact Email: eric.arneson@dot.wi.gov

Address: 4822 Madison Yards Way, Madison, WI 53707-7910

Contract Date: January 31, 2017

Contract Amount: \$ 1,590,651.01

Requirements of Contract: The project involves requirements definition, implementation, and adoption of Autodesk solutions for the advancement of Digital Project Delivery. The Design Delivery of BIM on the cloud

Company Name: California Department of Transportation

Contact Name and Phone Number: Kevin Huang 916-227-2631

Contact Email: kevin.huang@dot.ca.gov

Address: 1727 30th St. MS 30, Sacramento, CA 95816-7005

Contract Date: October 18, 2020

Contract Amount: \$ 3,850,000.00

Requirements of Contract: The purpose of this project was to implement a new Roadway Design Software (RDS) to replace CAICE software that was in use by Caltrans. The project was to configure the app

Company Name: Montana Department of Transportation

Contact Name and Phone Number: Kathy James 406-444-6327

Contact Email: KJames@mt.gov

Address: 2701 Prospect Ave. PO box 201001, Helena, MT 59620

Contract Date: July 30, 2021

Contract Amount: \$ 372,308.12

Requirements of Contract: Montana Department of Transportation CADD Software and Services DLT Managed overall deliverables as prime. July 2021 - Present

**G. COMPLIANCE:**

1. In the past five (5) years, has your firm or any firm owner, partner, officer, executive, or manager been criminally penalized or found civilly liable, either in a court of law or pursuant to the terms of a settlement agreement, for violating any federal, state, or local law in performance of a contract, including but not limited to, laws regarding health and safety, labor and employment, permitting, and licensing laws?

Yes  No

If Yes, use Attachment A to explain specific circumstances surrounding each instance. Include the name of the entity involved, the specific infraction(s) or violation(s), dates of instances, and outcome with current status.

2. In the past five (5) years, has your firm been determined to be non-responsible by a public entity?

Yes  No

If **Yes**, use Attachment A to explain specific circumstances of each instance. Include the name of the entity involved, the specific infraction, dates, and outcome.

**H. BUSINESS INTEGRITY:**

- 1. In the past five (5) years, has your firm been convicted of or found liable in a civil suit for making a false claim or material misrepresentation to a private or public entity?  
 **Yes**             **No**

If **Yes**, use Attachment A to explain specific circumstances of each instance. Include the entity involved, specific violation(s), dates, outcome and current status.

- 2. In the past five (5) years, has your firm or any of its executives, management personnel, or owners been convicted of a crime, including misdemeanors, or been found liable in a civil suit involving the bidding, awarding, or performance of a government contract?  
 **Yes**             **No**

If **Yes**, use Attachment A to explain specific circumstances of each instance; include the entity involved, specific infraction(s), dates, outcome and current status.

- 3. In the past five (5) years, has your firm or any of its executives, management personnel, or owners been convicted of a federal, state, or local crime of fraud, theft, or any other act of dishonesty?  
 **Yes**             **No**

If **Yes**, use Attachment A to explain specific circumstances of each instance; include the entity involved, specific infraction(s), dates, outcome and current status.

- 4. Do any of the Principals of your firm have relatives that are either currently employed by the City or were employed by the City in the past five (5) years?  
 **Yes**             **No**

If **Yes**, please disclose the names of those relatives in Attachment A.

**I. BUSINESS REPRESENTATION:**

- 1. Are you a local business with a physical address within the County of San Diego?  
 **Yes**             **No**
- 2. Are you a certified Small and Local Business Enterprise certified by the City of San Diego?  
 **Yes**             **No**

Certification # \_\_\_\_\_

- 3. Are you certified as any of the following:
  - a. Disabled Veteran Business Enterprise Certification # \_\_\_\_\_
  - b. Woman or Minority Owned Business Enterprise Certification # \_\_\_\_\_
  - c. Disadvantaged Business Enterprise Certification # \_\_\_\_\_

**J. WAGE COMPLIANCE:**

In the past five (5) years, has your firm been required to pay back wages or penalties for failure to comply with the federal, state or local **prevailing, minimum, or living wage laws**?  **Yes**     **No**    If **Yes**, use Attachment A to explain the specific circumstances of each instance. Include the entity involved, the specific infraction(s), dates, outcome, and current status.

By signing this Pledge of Compliance, your firm is certifying to the City that you will comply with the requirements of the Equal Pay Ordinance set forth in SDMC sections 22.4801 through 22.4809.



**K. STATEMENT OF SUBCONTRACTORS & SUPPLIERS:**

Please provide the names and information for all subcontractors and suppliers used in the performance of the proposed contract, and what portion of work will be assigned to each subcontractor. Subcontractors may not be substituted without the written consent of the City. Use Attachment A if additional pages are necessary. If no subcontractors or suppliers will be used, please write "Not Applicable."

Company Name: USCAD

Address: 18831 Bardeen Ave., #200, Irvine, CA 92612

Contact Name: Melanie Zubok Phone: (310) 804-5810 Email: Melanie.Zubok@USCAD.com

Contractor License No.: \_\_\_\_\_ DIR Registration No.: \_\_\_\_\_

Sub-Contract Dollar Amount: \$ \_\_\_\_\_ (per year) \$ 1,324,663 (total contract term)

Scope of work subcontractor will perform: Software training and consulting services

Identify whether company is a subcontractor or supplier: Subcontractor

Certification type (check all that apply):  DBE  DVBE  ELBE  MBE  SLBE  WBE  Not Certified

Contractor must provide valid proof of certification with the response to the bid or proposal to receive participation credit.

Company Name: Autodesk

Address: One Market, Suite 400, San Francisco, VA 94105

Contact Name: Justin Lingenfelter Phone: 305-401-3943 Email: justin.lingenfelter@autodesk.com

Contractor License No.: 1239116 DIR Registration No.: N/A

Sub-Contract Dollar Amount: \$ 4,809,129.85 (per year) \$Year 1:\$848,788.83 Year 2:\$914,942.05 Year 3:\$972,560.78 Year 4:\$1,015,947.89 Year 5:\$1,056,890.30 (total contract term)

Scope of work subcontractor will perform: Autodesk Software Subscriptions Identify whether company is a subcontractor or supplier: Supplier Certification type (check all that apply): DBE DVBE ELBE

MBE SLBE WBE Not Certified Contractor must provide valid proof of certification with the response to the bid or proposal to receive participation credit.

**L. STATEMENT OF AVAILABLE EQUIPMENT:**

A full inventoried list of all necessary equipment to complete the work specified may be a requirement of the bid/proposal submission.

By signing and submitting this form, the Contractor certifies that all required equipment included in this bid or proposal will be made available one week (7 days) before work shall commence. In instances where the required equipment is not owned by the Contractor, Contractor shall explain how the equipment will be made available before the commencement of work. The City of San

Diego reserves the right to reject any response, in its opinion, if the Contractor has not demonstrated he or she will be properly equipped to perform the work in an efficient, effective matter for the duration of the contract period.

**M. TYPE OF SUBMISSION:** This document is submitted as:

- Initial submission of *Contractor Standards Pledge of Compliance*
- Initial submission of *Contractor Standards Pledge of Compliance* as part of a Cooperative agreement
- Initial submission of *Contractor Standards Pledge of Compliance* as part of a Sole Source agreement
- Update of prior *Contractor Standards Pledge of Compliance* dated \_\_\_\_\_.

**Complete all questions and sign below.**

Under penalty of perjury under the laws of the State of California, I certify that I have read and understand the questions contained in this Pledge of Compliance, that I am responsible for completeness and accuracy of the responses contained herein, and that all information provided is true, full and complete to the best of my knowledge and belief. I agree to provide written notice to the Purchasing Agent within five (5) business days if, at any time, I learn that any portion of this Pledge of Compliance is inaccurate. Failure to timely provide the Purchasing Agent with written notice is grounds for Contract termination.

I, on behalf of the firm, further certify that I and my firm will comply with the following provisions of SDMC section 22.3004:

(a) I and my firm will comply with all applicable local, State and Federal laws, including health and safety, labor and employment, and licensing laws that affect the employees, worksite or performance of the contract.

(b) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of receiving notice that a government agency has begun an investigation of me or my firm that may result in a finding that I or my firm is or was not in compliance with laws stated in paragraph (a).

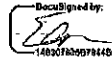
(c) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of a finding by a government agency or court of competent jurisdiction of a violation by the Contractor of laws stated in paragraph (a).

(d) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of becoming aware of an investigation or finding by a government agency or court of competent jurisdiction of a violation by a subcontractor of laws stated in paragraph (a).

(e) I and my firm will cooperate fully with the City during any investigation and to respond to a request for information within ten (10) working days.

**Failure to sign and submit this form with the bid/proposal shall make the bid/proposal non-responsive. In the case of an informal solicitation, the contract will not be awarded unless a signed and completed *Pledge of Compliance* is submitted.**

Elizabeth White, Senior Director of Contracts and Corporate Counsel

DocuSigned by:  
  
148307ab099844b

4/24/2023

Name and Title

Signature

Date

**City of San Diego  
CONTRACTOR STANDARDS  
Attachment "A"**

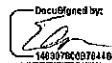
Provide additional information in space below. Use additional Attachment "A" pages as needed. Each page must be signed. Print in ink or type responses and indicate question being answered.

<b>Company Name:</b> Worksters, Inc.	<b>Address:</b> 350 Tenth Avenue, STE 1000, San Diego, CA 92101
<b>Contact Name:</b> Ania Kaminska	<b>Phone:</b> 619-344-2732
<b>Email:</b> ania.worksters.com	
<b>Contractor License No.:</b>	<b>DIR Registration No.:</b>
<b>Sub-Contract Dollar Amount:</b> \$ 15,000.00 (per year) \$75,000.00 (total contract term)	
<b>Scope of work subcontractor will perform:</b> IT & QA Support	
<b>Identify whether company is a subcontractor or supplier:</b>	
<b>Certification type (check all that apply):</b> <b>DBE</b> DVBE ELBE MBE <b>SLBE</b> <b>WBE</b> Not Certified	
Contractor must provide valid proof of certification with the response to the bid or proposal to receive participation credit.	
<ol style="list-style-type: none"> <li>1. Worksters is a part of the City of San Diego Business Enhancement Program.</li> <li>2. I was appointed to the City of San Diego Small Business Advisory Board.</li> </ol> <p>Worksters is participating in the City of San Diego Small Business Enhancement Program. The City of San Diego conducted a Disparity Study which showed insufficient procurement from local small businesses. The City of San Diego Small Business Enhancement Program is funded by the City of San Diego. It provides training and support for small local businesses that want to support the City.</p>	

I have read the matters and statements made in this Contractor Standards Pledge of Compliance and attachments thereto and I know the same to be true of my own knowledge, except as to those matters stated upon information or belief and as to such matters, I believe the same to be true. I certify under penalty of perjury that the foregoing is true and correct.

Elizabeth White, Senior Director of Contracts

Print Name, Title

DocuSigned by:  
  
148937960078416

Signature

4/24/2023

Date

**EQUAL OPPORTUNITY CONTRACTING PROGRAM (EOCP)**  
**GOODS AND SERVICES CONTRACTOR REQUIREMENTS**

**I. City's Equal Opportunity Contracting Commitment.**

The City of San Diego (City) promotes equal employment and subcontracting opportunities. The City is committed to ensuring that taxpayer dollars spent on public contracts are not paid to businesses that practice discrimination in employment or subcontracting. The City encourages all companies seeking to do business with the City to share this commitment. Contractors are encouraged to take positive steps to diversify and expand their subcontractor and supplier solicitation base and to offer opportunities to all eligible business firms.

*Contractors must submit the required EOCP documentation indicated below with their bids. Contractors who fail to provide the required EOCP documentation are considered non-responsive.*

**II. Definitions.**

**Commercially Useful Function:** a Small Local Business Enterprise or Emerging Local Business Enterprise (SLBE/ELBE) performs a commercially useful function when it is responsible for execution of the work of the contract and is carrying out its responsibilities by actually performing, managing, and supervising the work involved. To perform a commercially useful function, the SLBE/ELBE shall also be responsible, with respect to materials and supplies used on the contract, for negotiating price, determining quality and quantity, ordering the material, and installing (where applicable) and paying for the material itself.

To determine whether a SLBE/ELBE is performing a commercially useful function, an evaluation will be performed of the amount of work subcontracted, normal industry practices, whether the amount the SLBE/ELBE firm is to be paid under the contract is commensurate with the work it is actually performing and the SLBE/ELBE credit claimed for its performance of the work, and other relevant factors. Specifically, a SLBE/ELBE does not perform a commercially useful function if its role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of meaningful and useful SLBE/ELBE participation, when in similar transactions in which SLBE/ELBE firms do not participate, there is no such role performed.

**Disadvantaged Business Enterprise (DBE):** a certified business that is (1) at least fifty-one (51%) owned by socially and economically Disadvantaged Individuals, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more socially and economically Disadvantaged Individuals; and (2) whose daily business operations are managed and directed by one or more socially and economically disadvantaged owners. Disadvantaged Individuals include Black Americans, Hispanic Americans, Asian Americans, and other minorities, or individual found to be disadvantaged by the Small Business Administration pursuant to Section 8 of the Small Business Reauthorization Act.

**Disabled Veteran: Disabled Veteran Business Enterprise (DVBE):** a certified business that is (1) at least fifty-one percent (51%) owned by one or more Disabled Veterans; and (2) business operations must be managed and controlled by one or more Disabled Veterans. A Disabled Veteran is a veteran of the U.S. military, naval, or air service who resides in California and has a service-connected disability of at least 10% or more. The firm shall be certified by the State of California's Department of General Services, Office of Small and Minority Business.

**Emerging Business Enterprise (EBE):** a business whose gross annual receipts do not exceed the amount set by the City Manager, and which meets all other criteria set forth in regulations implementing the City's Small and Local Business Preference Program. The City Manager shall review the threshold amount for EBEs on an annual basis, and adjust as necessary to reflect changes in the marketplace.

**Emerging Local Business Enterprise (ELBE):** a Local Business Enterprise that is also an Emerging Business Enterprise.

**Local Business Enterprise (LBE):** a business that has both a principle place of business and a significant employment presence in the County of San Diego, and that has been in operation for twelve (12) consecutive months.

**Minority Business Enterprise (MBE):** a certified business that is (1) at least fifty-one percent (51%) owned by one or more minority individuals, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more minority individuals; and (2) whose daily business operations are managed and directed by one or more minorities owners. Minorities include the groups with the following ethnic origins: African, Asian Pacific, Asian Subcontinent, Hispanic, Native Alaskan, Native American, and Native Hawaiian.

**Other Business Enterprise (OBE):** any business which does not otherwise qualify as Minority, Woman, Disadvantaged, or Disabled Veteran Business Enterprise.

**Principle Place of Business:** a location wherein a business maintains a physical office and through which it obtains no less than fifty percent (50%) of its gross annual receipts.

**Significant Employee Presence:** no less than twenty-five percent (25%) of a business's total number of employees.

**Small Business Enterprise (SBE):** a business whose gross annual receipts do not exceed the amount set by the City Manager, and that meets all other criteria set forth in regulations implementing the City's Small and Local Business Preference Program. The City Manager shall review the threshold amount for SBEs on an annual basis, and adjust as necessary to reflect changes in the marketplace. A business certified as a DVBE by the State of California, and that has provided proof of such certification to the City Manager, shall be deemed to be an SBE.

**Small Local Business Enterprise (SLBE):** a Local Business Enterprise that is also a Small Business Enterprise.

**Women Business Enterprise (WBE):** a certified business that is (1) at least fifty-one percent (51 %) owned by a woman or women, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more women; and (2) whose daily business operations are managed and directed by one or more women owners.

### **III. Disclosure of Discrimination Complaints.**

As part of its bid, Contractor shall provide to the City a list of all instances within the past ten (10) years where a complaint was filed or pending against Contractor in a legal or administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors, or suppliers, and a description of the status or resolution of that complaint, including any remedial action taken. (Attachment AA).

### **IV. Workforce Report and Equal Opportunity Outreach Plan.**

- A. Work Force Report. Contractors shall submit with their bid a Work Force Report (WFR) for approval by the City. (Attachment BB). If the City determines that there are under representations when compared to County Labor Force Availability data, then the Contractor will also be required to submit an Equal Employment Opportunity Plan (EEOP) to the City for approval. Questions regarding the WFR should be directed to the Equal Opportunity Contracting Department.
- B. Duty to Comply with Equal Opportunity Outreach Plan. A Contractor for whom an EEOP has been approved by the City shall use best efforts to comply with that EEOP.

### **V. Small and Local Business Program Requirements.**

The City has adopted a Small and Local Business Preference Program for goods and services contracts. The SLBE requirements are set forth in Council Policy 100-10. For goods, services, and consultant contracts in which the Purchasing Agent is required to advertise for sealed bids in the City's official newspaper:

- A. The City shall apply a bid discount in the way of:
  - a. Five percent (5%) discount off the bid price for SLBE or ELBE prime contractors; or
  - b. Five percent (5%) discount off the bid price for prime contractors achieving the voluntary goal of twenty percent (20%) for SLBE or ELBE subcontractor participation set forth in Subsection B below.

The discount will not apply if an award to the discounted bidder would result in a total contract cost of \$50,000 in excess of the low, non-discounted bid. In the event of a tie between a discounted bidder and non-

discounted bidder, the discounted bidder will be awarded the contract. The discount shall be taken off the total contract value, including contract option years.

- B. Include a voluntary subcontractor participation requirement of 20% of the total bid price for SLBE or ELBEs.

#### **VI. Maintaining Participation Levels.**

- A. Bid discounts are based on the bidder's level of participation proposed prior to the award of the goods, services, or consultant contract. Bidders are required to achieve and maintain the SLBE or ELBE participation levels throughout the duration of the goods, services, or consultant contract.
- B. If the City modifies the original specifications, the bidder shall make reasonable efforts to maintain the SLBE or ELBE participation for which the bid discount was awarded. The City must approve in writing a reduction in SLBE or ELBE participation levels.
- C. Bidder shall notify and obtain written approval from the City in advance of any reduction in subcontract scope, termination, or substitution for a designated SLBE or ELBE subcontractor.
- D. Bidder's failure to maintain SLBE or ELBE participation levels as specified in the goods, services, or consultant contract shall constitute a default and grounds for debarment under Chapter 2, Article 2, Division 8, of the San Diego Municipal Code.
- E. The remedies available to the City under Council Policy 100-10 are cumulative to all other rights and remedies available to the City.

#### **VII. Certifications.**

The City accepts certifications of MBE, WBE, DBE, or DVBE from the following certifying agencies:

- A. Current certification by the State of California Department of Transportation (CALTRANS) as DBE.
- B. Current MBE or WBE certification from the California Public Utilities Commission.
- C. DVBE certification is received from the State of California's Department of General Services, Office of Small and Minority Business.
- D. Current certification by the City of Los Angeles as DBE, WBE, or MBE.



Subcontractors' valid proof of certification status e.g., copy of MBE, WBE, DBE, or DVBE certification must be submitted with the ITB. MBE, WBE, DBE, or DVBE certifications are listed for informational purposes only.

**VIII. List of Attachments.**

- AA. Contractors Certification of Pending Actions
- BB. Work Force Report

**AA. CONTRACTORS CERTIFICATION OF PENDING ACTIONS**

As part of this Contract, the Contractor must provide to the City a list of all instances within the past 10 years where a complaint was filed or pending against the Contractor in a legal or administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers, and a description of the status or resolution of that complaint, including any remedial action taken.


CHECK ONE BOX ONLY.

- The undersigned certifies that within the past 10 years the Contractor has NOT been the subject of a complaint or pending action in a legal administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers.
- The undersigned certifies that within the past 10 years the Contractor has been the subject of a complaint or pending action in a legal administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers. A description of the status or resolution of that complaint, including any remedial action taken and the applicable dates is as follows:

DATE OF CLAIM	LOCATION	DESCRIPTION OF CLAIM	LITIGATION (Y/N)	STATUS	RESOLUTION/ REMEDIAL ACTION TAKEN

Contractor Name: DLT Solutions, LLC

Certified By Elizabeth White Name Title Senior Director of Contracts and Corporate Counsel

 Date April 20, 2023  
Signature



**EQUAL OPPORTUNITY CONTRACTING (EOC)**  
1200 Third Avenue, Suite 200 • San Diego, CA 92101  
Phone: (619) 236-6000 • Fax: (619) 236-5904

### BB. WORK FORCE REPORT

The objective of the *Equal Employment Opportunity Outreach Program*, San Diego Municipal Code Sections 22.3501 through 22.3517, is to ensure that contractors doing business with the City, or receiving funds from the City, do not engage in unlawful discriminatory employment practices prohibited by State and Federal law. Such employment practices include, but are not limited to unlawful discrimination in the following: employment, promotion or upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rate of pay or other forms of compensation, and selection for training, including apprenticeship. Contractors are required to provide a completed *Work Force Report (WFR)*.

**NO OTHER FORMS WILL BE ACCEPTED  
CONTRACTOR IDENTIFICATION**

Type of Contractor:  Construction  Vendor/Supplier  Financial Institution  Lessee/Lessor  
 Consultant  Grant Recipient  Insurance Company  Other

Name of Company: DLT Solutions, LLC

ADA/DBA: \_\_\_\_\_

Address (Corporate Headquarters, where applicable): 2411 Dulles Corner Park STE 800

City: Herndon County: Fairfax State: VA Zip: 20171

Telephone Number: 800-262-8358 Fax Number: \_\_\_\_\_

Name of Company CEO: Eddie Franklin

Address(es), phone and fax number(s) of company facilities located in San Diego County (if different from above):

Address: \_\_\_\_\_

City: \_\_\_\_\_ County: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_ Email: \_\_\_\_\_

Type of Business: Distributor/Aggregator Type of License: \_\_\_\_\_

The Company has appointed: Kerianne Nolan

As its Equal Employment Opportunity Officer (EEOO). The EEOO has been given authority to establish, disseminate and enforce equal employment and affirmative action policies of this company. The EEOO may be contacted at:

Address: 2411 Dulles Corner Park, STE 800, Herndon, VA, 20171

Telephone Number: 800-262-4358 Fax Number: \_\_\_\_\_ Email: Sales@dlts.com

- One San Diego County (or Most Local County) Work Force - Mandatory
- Branch Work Force \*
- Managing Office Work Force

Check the box above that applies to this WFR.

\*Submit a separate Work Force Report for all participating branches. Combine WFRs if more than one branch per county.

I, the undersigned representative of DLT Solutions, LLC

Fairfax (County), VA (State) hereby certify that information provided

herein is true and correct. This document was executed on this 20<sup>th</sup> day of April, 2023

\_\_\_\_\_  
(Authorized Signature) Elizabeth White  
(Print Authorized Signature Name)

**WORK FORCE REPORT - Page 2**

NAME OF FIRM: DLT Solutions, LLC DATE: 4/20/23  
 OFFICE(S) or BRANCH(ES): Office COUNTY: Fairfax

INSTRUCTIONS: For each occupational category, indicate number of males and females in every ethnic group. Total columns in row provided. Sum of all totals should be equal to your total work force. Include all those employed by your company on either a full or part-time basis. The following groups are to be included in ethnic categories listed in columns below:

- (1) Black or African-American
- (2) Hispanic or Latino
- (3) Asian
- (4) American Indian or Alaska Native
- (5) Native Hawaiian or Pacific Islander
- (6) White
- (7) Other race/ethnicity; not falling into other groups

Definitions of the race and ethnicity categories can be found on Page 4

ADMINISTRATION OCCUPATIONAL CATEGORY	(1) Black or African American		(2) Hispanic or Latino		(3) Asian		(4) American Indian/ Nat. Alaskan		(5) Pacific Islander		(6) White		(7) Other Race/ Ethnicity	
	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)
Management & Financial	3	3	0	1	2	1	0	0	0	0	33	10	3	1
Professional	10	2	4	5	13	6	0	0	1	0	42	21	2	1
A&E, Science, Computer	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Technical	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sales	11	2	16	5	5	4	0	0	0	0	47	14	2	2
Administrative Support	2	3	1	4	1	7	0	0	0	0	2	6	1	1
Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Crafts	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Operative Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Laborers*	0	0	0	0	0	0	0	0	0	0	0	0	0	0

\*Construction laborers and other field employees are not to be included on this page

Totals Each Column	26	10	21	15	21	18	0	0	1	0	124	51	8	5
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Grand Total All Employees **300.00**

Indicate by Gender and Ethnicity the Number of Above Employees Who Are Disabled:

Disabled	0	0	0	0	0	0	0	0	0	0	0	0	0	0
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Non-Profit Organizations Only:

Board of Directors														
Volunteers														
Artists														

May 5, 2023

City of San Diego  
1200 Third Avenue, Suite 200  
San Diego, California 92101  
Attention: Mr. Taylor Cox, Sr. Proc. Contracting Officer

Subject: RFP for Computer Aided Design Drafting Software; Solicitation No. # 10089997-23-C

Dear Mr. Cox,

DLT, on behalf of the Autodesk Software CADD Delivery Team (comprised of Autodesk, U.S. CAD, and Worksters as subcontractors and DLT as the prime contractor), is pleased to provide this response to the subject RFP. Over the past 6 years, U.S. CAD has been immersed in understanding the City of San Diego's (the City's) technical needs and future objectives while supporting their pilot teams with remote deployment, content creation, in person and remote training, and adoption of Autodesk design and cloud solutions.

We are excited about this opportunity to provide CADD software and services and look forward to working with the City on this important project. Should you have any questions or need additional information, feel free to email me at [shaun.gaffrey@dlt.com](mailto:shaun.gaffrey@dlt.com)

Sincerely,

Shaun Gaffrey, Contract Manager  
DLT a Tech Data Company  
[Shaun.gaffrey@dlt.com](mailto:Shaun.gaffrey@dlt.com)

## About Our Team

### DLT (Prime Contractor)

DLT, a wholly owned subsidiary of Tech Data Corporation (54-1599882), specializes in facilitating government contracting for IT and engineering firms and has been working with Autodesk for more than 25 years on over 10,000 procurements per year. DLT has experience in processing state contracts, including a recent Montana Department of Transportation contract awarded to DLT as prime contractor for Autodesk software. DLT allows our team member firms to do what they do best: provide excellent software solutions. As the Master Government Aggregator for Autodesk software, DLT will be serving as prime contractor on this project.



DLT brings:

- A long history with federal, state and municipal entities and experience obtained through thousands of contractual transactions annually providing IT solutions
- Extensive involvement with Federal and State Transportation agencies supporting in the implementation and utilization of Autodesk software licenses
- A 25 + year relationship with Autodesk currently acting as their Master Government Aggregator
- A broad portfolio of over 50 in-house government contract vehicles to assist our customers in purchasing more efficiently

### Autodesk (Subcontractor)

Autodesk, Inc. (Autodesk), a subcontractor to DLT under this RFP, has been a pioneer for more than 40 years in dynamic 3D model-based transportation design and construction.



Autodesk is an American multinational software corporation headquartered in California that makes software products for architecture, engineering, construction, manufacturing, media, education, and entertainment industries. The company has offices worldwide, including an office in San Diego, where the Autodesk Account Manager for San Diego is located. AutoCAD, the company's flagship computer-aided design (CAD) software, led the drafting revolution. Revit led the BIM revolution. Autodesk software has been used on projects from the One World Trade Center to Tesla electric cars to the Oakland Bay Bridge.

Autodesk is a leading technology provider in the AEC, Media & Entertainment (<https://www.autodesk.com/campaigns/otto-desc>.) and Manufacturing Industries. Autodesk solutions enable visualization, modeling, design, analysis, fabrication, construction, and collaboration needed, whether it is a small project or a complex statewide roadway and bridge replacement program.

Autodesk's role on the team is to supply the software solutions. They will provide:

### **The Autodesk Architecture, Engineering & Construction (AEC) Collection**

- The AEC Collection provides designers, engineers, and contractors a set of BIM and CAD tools supported by a cloud-based common data environment that facilitates project delivery from early-stage design through to construction

- The AEC Collection includes the following products: Revit, Civil 3D, AutoCAD, InfraWorks, Navisworks Manage and Autodesk Docs
- The AEC Collection is a collection of integrated tools that go beyond just detailed design, including 17 individual products that are integrated to work together.

**Autodesk BIM Collaborate Pro**

- Autodesk BIM Collaborate Pro empowers teams with the coordination tools they need to avoid misalignment, catch errors earlier, and save money. Data is captured across project lifecycles and displayed in powerful dashboards that shine a light on project issues, transparency, and the completion status of major milestones
- Autodesk BIM Collaborate Pro gives your teams anytime, anywhere access to tools and project information needed. With powerful co-authoring, project management, and model coordination tools, your team can work together in a secure common data environment.

**Autodesk Premium**

- Autodesk’s Premium Plan is designed to help customers who manage 10 or more subscriptions more efficiently. Premium offers customers additional administrative, security and reporting benefits.
- Autodesk Premium includes Single sign-on (SSO), 24/7 live support, product usage reporting with user details and directory sync.

Details on the Autodesk products being provided are included in Appendix B.

**U.S CAD (Subcontractor)**

Guided by over two decades of experience, U.S. CAD offers the AEC industry’s most powerful suite of design, build, and construction technology and professional services such as consulting, training, implementation, and BIM production to manage projects from conception through construction. Since projects, resources, technology, and workflows are continually changing, our solutions and services are designed to evolve with their customers to help them achieve success on each and every project.



Led by founder and CEO Daniel Counts, the company has evolved into one of the largest AEC technology and consulting firms in the United States, with nearly 120 employees across 14 offices including headquarters in Irvine, CA, and more than 13,000 customers: many ranking on the ENR Top Lists.

U.S. CAD’s mission is to empower design and construction professionals with technology and supporting services to solve real project challenges. Their approach is to help the AEC community be more efficient, collaborative, and innovative and drive better project outcomes cost-effectively.

U.S. CAD has curated an unmatched portfolio of AEC technology solutions and services, backed by our team of certified product and industry experts who are devoted to fully understanding customer needs and goals. Their Subject Matter Experts, training staff, Project Managers and technical experts provide innovative and proven AEC technology solutions and

**CORE VALUES**

**HONESTY**  
and  
**INTEGRITY**  
The only way to win is to play fair.

**COMMITMENT TO EXCELLENT SERVICE**  
Working together, we can do it right.

**ACCOUNTABILITY**  
Responsible to our customers, the industry and ourselves.

**TRUST AND MUTUAL RESPECT**  
The foundation of an excellent team.

services in response to customer needs and industry trends.

As shown on the map below, U.S. CAD has offices throughout the United States including San Diego, where the U.S. CAD Account Manager for the City, Ms. Melanie Zubok, is located.



U.S. CAD is also actively involved in supporting the AEC community and regularly sponsors association events such as American Council of Engineering Companies (ACEC), American Institute of Architects (AIA), Associate General Contractors of America (AGC), and Design-Build Institute of America (DBIA). U.S. CAD also hosts events and participates in many other third-party AEC events each year – live and virtual - providing professionals with thought leadership, technical tours, exhibitions and conferences, networking events, and panels. U.S. CAD is passionate about educating the industry on BIM, emerging trends, and technologies to help industry professionals make appropriate business decisions.

Ms. Melanie Zubok, a Strategic Account Manager and the main point of contact for the City of San Diego Engineering, will be overseeing the U.S. CAD contribution to ensure that the City is satisfied with project performance. For the past six years, she has been immersed in understanding the City’s technical needs and future objectives while supporting their pilot teams with remote deployment, content creation, training, and adoption of Autodesk design solutions.

U.S. CAD is a trusted one-stop industry partner for design, engineering, construction, and collaboration software, cloud storage solutions, reality capture technology, on-demand learning, BIM modeling, consulting, training, staff augmentation, and technical support.

[Worksters \(Subcontractor – Small Local Business Enterprise \(SLBE\)\)](#)

Worksters, an SLBE firm, is located in downtown San Diego. It was founded in 2011 to provide superior technology and products to the United States government, concentrating in data security and



**WORKSTERS**



management, business intelligence solutions, and software development. Worksters has a strong past performance history with clients that include U.S. GSA Design & Construction Division, U.S. Department of Urban Development (an Autodesk AEC project), the City of San Jose, and many more. Worksters is certified as SBA 8 (a), WOSB, DBE, SLBE, EDWOSB, and HUBZone Certified Small Business, and is Quality System ISO 9001:2015 Certified.

Worksters will provide third party quality assurance and IT support for the Autodesk Software CADD Delivery Team. They will work closely with the Autodesk Software CADD Delivery Team's Technical Lead to ensure that deployment packages of software adhere to the City's requirements, perform testing of installation packages, and review documentation related to administration of City-specific Autodesk software applications.

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

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The information and forms required to be submitted under Tab A are provided on the following pages.

## 1. Contract Signature Page

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Contract Signature  
Page - Addendum D

## 1.1. Acknowledgement of Amendments



20230330115138208  
Addendum A.pdf



20230414162850999  
Addendum B.pdf



20230420144502571  
Addendum D.pdf



San Diego  
Addendum C.pdf

Please note that all amendments were acknowledged and accepted on the PlanetBids site and listed on the signed Contract Signature page.

### 1.1.1. Confidentiality and Non-Disclosure Agreement

Per Addendum B, the Confidentiality and Non-Disclosure Agreement form has been added to the requirements. Please find signed form included below and attached in this document.



Confidentiality and  
Non-Disclosure Agr

## 2. Exceptions Requested

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### 3. Contractor Standards Pledge of Compliance Form

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Contractor  
Standards Pledge of

## 4. Equal Opportunity Contracting Forms

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Equal Opportunity  
Contracting Program

#### 4.1. Work Force Report



Work Force  
Report.pdf



## 4.2. Contractors Certification of Pending Actions



Contractors  
Certification of Penc

## 5. Additional Information as Required by Exhibit B

In accordance with Proposal Submission instructions, RFP section 2.8, we have provided additional information as required by Exhibit B. For ease of review, Exhibit B is included below in ***bold italic*** text, with our response following.

### A. Background

***1. The City of San Diego (City) Engineering & Capital Projects (E&CP) Department currently utilizes Bentley Systems Computer Aided Design and Drafting (CADD) applications to analyze, design, plan, and construct engineering projects for the City's Capital Improvements Program (CIP). The City provides CADD software applications to over 325 CADD users citywide that are dependent on the applications and workflows of CIP projects.***

No response necessary.

***2. Bentley System provides the City with ProjectWise, Microstation, Open Roads Designer Suite, FlowMaster and a host of other applications tools for modeling, drafting and other engineering designing functions. These software's are used by various City Departments, especially in Engineering & Capital Projects, Storm Water, Environmental Services, Public Utilities and Transportation Departments to create detailed engineering plans and specifications for construction projects that are utilized by architects, engineers, geospatial professionals, contractors, and consultants. Engineers and drafting classifications are dependent on the applications and workflows for planning, design and construction of CIP projects.***

No response necessary.

***3. The City's overall goal is to have an effective and sustainable CADD solution that includes cloud data storage, maintenance, support, training, standards customizations and data configurations of engineering applications. The CADD applications will need to address Civil, Architectural, and other engineering related aspects in order to plan, design and construct all assets in order to support the CIP.***

No response necessary.

### B. Specifications

***1. This application suite will require maintenance, support, training, cloud storage, application configuration, customizations, packing deployments, and geospatial configuration for plan and profiles views of construction drawings for various assets which includes Water, Sewer, Storm Water, Drainage, Treatment Plants, Pump Stations, Parks, Public Buildings, Airport Facilities, Recreation Facilities, Reservoirs, Dams, Bridges, Signals, Street Lights, Rail, Utilities Undergrounding, Streets and Traffic related projects.***

No response necessary.

***2. The application suite requires Cloud Hosting/ Software as a Service (SaaS) storage along with development and production environments. This database storage will need to include versioning, check-in and check-out functionality, information sharing capabilities with a minimum of 10TB of***

***optimum storage space with the ability to add space, as needed. The database environment will also require a collaboration server, configuration of CADD standards, resources, and managed workspaces for environments.***

No response necessary.

***3. A data migration and conversion process of existing file formats will be required to convert files into the new format extensions. This effort will be critical part of implementation phase and files will need to be reviewed and tested to ensure conversions are accurate and data has been converted correctly with no errors or corruption during data migration.***

No response necessary.

***4. The engineering design applications will need to have a dedicated print/ plot module for large scale plotting and provide customized pen, black & white and color table selections for all printing/ plotting sizes. The software must be able to incorporate high resolution orthophotography and photogrammetry from various file extensions, Microsoft Office Suite applications, Adobe products etc. The application will need to provide customization to the plan and profile views and support 2D and 3D drafting models, cells, line styles, weights, and colors. This application software will also require automated sheet creation, profiling, design cell templates, conflict resolution detections, scaling, hydraulic calculation functionality and integration to data collectors for importing and exporting data points.***

No response necessary.

***5. The Contractor will need to refer to City of San Diego – Department of Information Technology (DoIT) FY23-27 IT Strategic Plan to assess any mitigation and transition needs. The contractor will also need to provide tools for creating application packages to end-user's computers. The applications will need to be compatible with third party applications such as TranSoft-AutoTurn, Trimble, CorpsCon, FloMonster, Axiom, DAT/EM Photogrammetry, StarNET and other engineering related applications.***

No response necessary.

## C. Training

***1. The Contractor will need to provide onsite and virtual trainings of all new applications to all City of San Diego CADD Users and Subject Matter Experts (SME's). On-going training and train the trainer instructions will be required to ensure CADD users have the knowledge and skillset available to be productive in the new software.***

U.S. CAD will provide fundamental and workflow-specific onsite and virtual training of all new Autodesk applications to the City's users. Additionally, U.S. CAD will provide update and new feature workshops throughout the implementation and support periods per the RFP requirements.

U.S. CAD will be providing onsite and virtual training of all new applications to the City's Subject Matter Experts (SMES) to ensure that CADD users will have the knowledge and skills required to be productive in the Autodesk software.

**On Site Training:**

If the U.S. CAD Mobile Classroom is utilized, U.S. CAD will deliver the workstations and set up the classroom environment on the afternoon before the start of the class. Workstations and course manuals will be laid out for each student to begin class.

If the U.S. CAD Mobile Classroom is not utilized, U.S. CAD will work with the City to ensure students have adequate workstations with the appropriate content and software loaded. Training manuals will be delivered to the City no later than the day before training is to commence.

On the morning of the first day of class, the U.S. CAD instructor will provide a personal introduction and then an agenda for the day's activities and if available the agenda for the entire course.

Prior to beginning instruction, U.S. CAD will solicit questions from the attendees and address anything necessary prior to beginning the class.

Once started, U.S. CAD's courses are a mix of instruction and hands-on lab time. During instruction, U.S. CAD asks attendees to pay attention to the instructor and watch the workflow unfold as the instructor navigates and explains the steps. Each instructional period includes a step-by-step set of instructions for students to follow as they complete the workflow themselves during lab time. The U.S. CAD instructor will be available during this time to answer questions and help students along the process.

Throughout the day 15-minute breaks are provided between the start of the course and lunch as well as between lunch and the end of the day. Generally, an hour break is provided for lunch around 12:00 pm, however the class content may dictate a slightly different schedule.

Our full or multi-day courses start at 8:30 am and conclude at 4:30 pm. This schedule is flexible, and U.S. CAD will work with the City of San Diego to determine the most effective start and end times.

**Virtual Training:**

U.S. CAD will work with the City to identify the correct platform. Generally, U.S. CAD hosts virtual training courses utilizing the Zoom platform, but Microsoft Teams has also been used.

U.S. CAD will work with the City to ensure students have adequate workstations with the appropriate content and software loaded. Training manuals will be delivered to the City no later than the day before training is to commence.

On the morning of the first day of class, the U.S. CAD instructor will provide a personal introduction and then an agenda for the day's activities and if available the agenda for the entire course.

Prior to beginning instruction, U.S. CAD will solicit questions from the attendees and address anything necessary prior to beginning the class.

Once started, our courses are a mix of instruction and lab time. During instruction, we ask attendees to pay attention to the instructor and watch the workflow unfold as the instructor navigates and explains the steps. Each instructional period includes a step-by-step set of instructions for students to follow as they complete the workflow themselves during lab time. The U.S. CAD instructor will be available during this time to answer questions and help students along the process. This can be accomplished utilizing

the chat feature in either Zoom or Microsoft Teams software.

Throughout the day 15-minute breaks are provided between the start of the course and lunch as well as between lunch and the end of the day. Generally, an hour break is provided for lunch around 12:00 pm, however the class content may dictate a slightly different schedule.

Virtual training generally concludes within 4-hours. In some cases, courses start in the morning and run until lunch break. Other times, courses start after the lunch break and conclude at the normal 4:30 pm time. Additionally, we can host training courses through the lunch break if and as necessary.

***2. Training Strategy & Recommended Training Plan: Contractor shall have an outline and describe the appropriate training for the Project Team as Administrators and Trainers as well as End Users based on the requirements in this proposal. The plan must include training materials (e.g., user manuals) and be reflected in the training costs for this proposal. The manuals must be routinely updated as policies or programs are upgraded. These manuals can also be electronic. Training will begin no later than thirty (30) calendar days after the solution is installed and accepted by the City. The City prefers virtual training due to the number of personnel, however the City will also want the option for on-site training. Please describe details of the types of training provided as well as training documents. Indicate if the training is provided as part of this proposal or available as part of continuing support.***

U.S. CAD developed the standard U.S. CAD Implementation Framework that has served to help achieve the most successful integration of the AEC Collection for agencies migrating from a Bentley environment to an Autodesk platform. The following approach provides the necessary steps that lead to successful implementation and end-user proficiency. This approach and scope have a proven track record for agencies similar to the City. Based on our review and understanding of your request, the standard U.S. CAD Implementation Framework will be tailored specifically for the City as transition from Bentley to Autodesk.

#### U.S. CAD Implementation Framework

A successful transition from a Bentley environment to an Autodesk platform typically involves the following tasks:

- Understand current workflows and deliverables through Discovery and Success Planning
- Map Bentley workflows to match Autodesk workflows, or in many cases revise workflows to find the optimal path to provide deliverables required.
- Education of staff on functionality of Autodesk software by key staff helps to uncover new ideas for workflows.
- Customization, conversion, and configuration of the existing Bentley content is done by our technical team in collaboration with the City. This process addresses standard templates, layering, naming conventions, and files for configuration of standard content.
- Development of documentation to help capture workflows, including providing staff with graphical representation of how things worked previously in the Bentley environment and how they work in the new Autodesk environment has helped expedite transitions.
- Implementation and classroom style training programs are provided to team members and administrators.
- Ongoing outreach and support are supplied to the City to ensure that the technology is fully adopted.

U.S. CAD will provide fundamental and workflow-specific onsite and virtual training of all new

applications to the City's users. Additionally, U.S. CAD will provide update and new feature workshops throughout the implementation and support period.

U.S. CAD will leverage its experience with multiple agencies and our Implementation Framework within the following proposed 6 Phases tailored to the City's request:

- Project Kick-Off, Preparation, and Finalization of Business Requirements
- Configuration, Interfaces, and Data Migration
- Workflow Development and Acceptance Testing
- Training
- Cut Over and Acceptance
- Post-Production Maintenance and Support

**Phase 1: Project Kick-Off, Preparation, and Finalization of Business Requirements**

U.S. CAD's experience with Bentley to Autodesk migration has given us insight on the correct approach to establish our partner's needs. This refined approach allows for transparency of our partners objectives and allows for the opportunity to review resources, procedures, workflows, work products, and meet with key staff in the various Departments. This will provide U.S. CAD and the City of San Diego a clear understanding of the existing and desired uses, obstacles, and workflows that must be addressed in Phase 2.

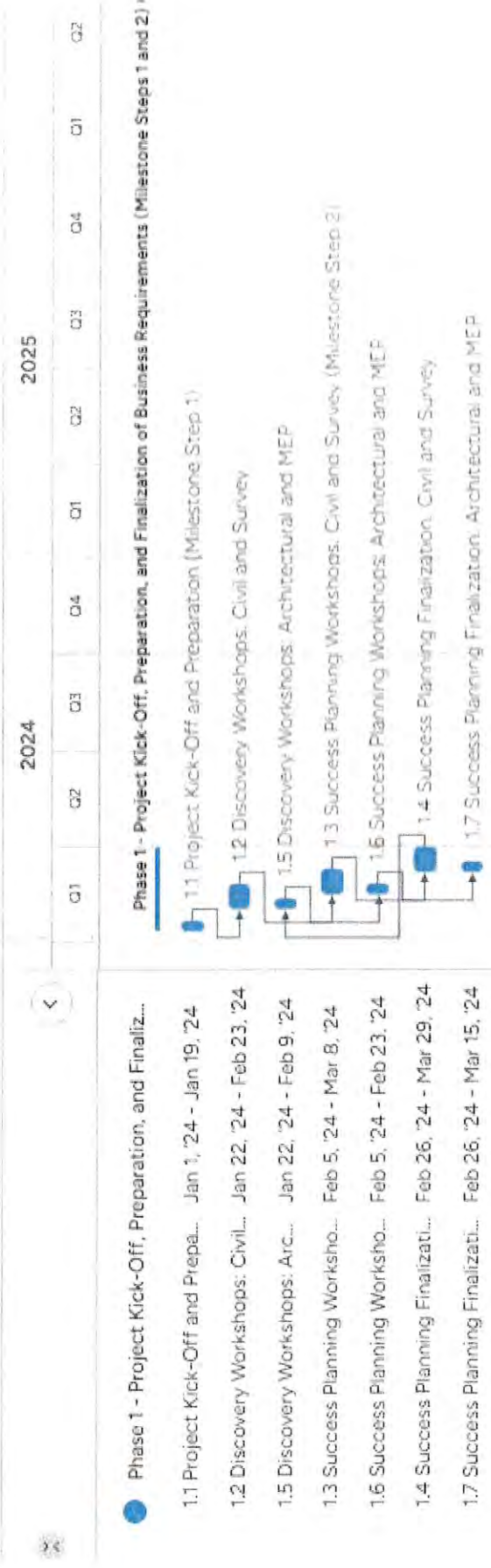
It is our understanding that this process will fulfill the City's Step 1 and 2 Milestones specified in the RFP.

U.S. CAD proposes the following Tasks within Phase 1:

- 1.1 Project Kick-Off and Preparation
- 1.2 Discovery Workshops: Civil and Survey
- 1.3 Success Planning Workshops: Civil and Survey
- 1.4 Success Planning Finalization: Civil and Survey
- 1.5 Discovery Workshops: Architectural and MEP
- 1.6 Success Planning Workshops: Architectural and MEP
- 1.7 Success Planning Finalization: Architectural and MEP

Based on these required tasks, a proposed schedule has been developed and is shown below. This schedule will serve as a road map for the completion of Phase 1.

**Proposed Schedule- Phase 1**



*\*The proposed schedule shown is an approximation only and does not account for delays resulting from unforeseen issues or the City project deadlines that may take priority over these tasks.*

#### Task 1.1: Project Kick-Off and Preparation

Our first phase is full of tasks that allow U.S. CAD to better understand the City's organization and software requirements. Task 1.1 allows for project teams from U.S. CAD and the City to introduce themselves and set the stage for the implementation activities. U.S. CAD will present our initial Implementation Framework plan, identify key project stakeholders, and finalize our communication plan to be distributed throughout the project teams.

U.S. CAD will solicit feedback from the City project team about our Implementation plan and will make necessary changes to the plan to accommodate the City before moving forward with the implementation.

Additionally, our Kick-Off meeting will allow for further explanation of the Success Planning process, and requirements of both project teams. U.S. CAD will follow-up with Discovery Workbooks for key project members to fill-out and return prior to commencing Task 1.2 and undergoing our Discovery Workshops. The Discovery Workbooks will give U.S. CAD common information about each department we'll be interfacing with and help to expedite the workshop by providing key information to our consulting team.

#### Task 1.2: Discovery Workshops: Civil and Survey

For U.S. CAD Technical Experts to effectively consult the City on appropriate software and workflows, we need to better understand the current workflows and software. The Discovery Workshop will provide space for U.S. CAD to investigate the current state of the City's workflows within the Civil and Survey departments.

Our Discovery process is a collaborative effort hosted virtually and utilizing online whiteboard functionality to allow every project team member the opportunity to contribute. U.S. CAD Technical Experts will use the information learned and documented in the Discovery Workshops to develop the first draft of our Success Plan.

U.S. CAD will ask for key members within the Civil and Survey departments to form two (2) groups. These groups will participate in Discovery, Success Planning, and Finalization workshops throughout Phase 1.

#### Task 1.3 Success Planning Workshops: Civil and Survey

These Workshops allow U.S. CAD to present what we've learned about the City's current state and present our draft Success Plan. U.S. CAD will explain each proposed solution and allow for feedback from the City.

This collaborative process will allow U.S. CAD and the City of San Diego to develop the final plan together, leveraging the City's knowledge of their workflows and processes and U.S. CAD's industry knowledge to produce and execute the most effective implementation plan we can for the City. Based on what we learn in this workshop, U.S. CAD will develop our draft Success Plan into a final form to present in Task 1.4.

#### Task 1.4 Success Planning Finalization: Civil and Survey

In this task, U.S. CAD will host Success Plan Presentations for each group within the Civil and Survey departments. These plans will outline the collaborative planning efforts in Phase 1 and provide the road map for the implementation.



#### **Task 1.5: Discovery Workshops: Architecture and MEP**

For U.S. CAD Technical Experts to effectively consult the City on appropriate software and workflows, we need to better understand the current workflows and software. The Discovery Workshop will provide space for U.S. CAD to investigate the current state of the City's workflows within the Civil and Survey departments.

Our Discovery process is a collaborative effort hosted virtually and utilizing online whiteboard functionality to allow every project team member the opportunity to contribute. U.S. CAD Technical Experts will use the information learned and documented in the Discovery Workshops to develop the first draft of our Success Plan.

#### **Task 1.6 Success Planning Workshops: Architecture and MEP**

These Workshops allow U.S. CAD to present what we have learned about the City's current state and present our draft Success Plan. U.S. CAD will explain each proposed solution and allow for feedback from the City.

This collaborative process will allow U.S. CAD and the City to develop the final plan together, leveraging the City's knowledge of their workflows and processes and U.S. CAD's industry knowledge to produce and execute the most effective implementation plan we can for the City. Based on what we learn in this workshop, U.S. CAD will develop our draft Success Plan into a final form to present in Task 1.4.

#### **Task 1.7 Success Planning Finalization: Architecture and MEP**

In this task, U.S. CAD will host Success Plan Presentations for each group within the Civil and Survey departments. These plans will outline the collaborative planning efforts in Phase 1 and provide the road map for the implementation.

#### **Phase 1: DELIVERABLES**

- Existing and Proposed Workflow Maps (Civil, Survey, Architecture, and MEP)
- Updated Training Plan
- Updated Implementation Plan

#### **Phase 1: ASSUMPTIONS**

- U.S. CAD will adjust the implementation and training plans to meet the needs of the City
- Timing and schedules may be adjusted based upon Success Planning efforts in this phase.
- U.S. CAD may adjust the success plan based upon final presentation feedback.

#### **Phase 2: Configuration, Interfaces, and Data Migration**

Finalizing the project approach in Phase 1, Phase 2 will focus on development of content, application customization, and data migration. Additionally, Administrator training will provide the City the knowledge and skills to administer their Autodesk applications and continue to develop content beyond the timeline of this project.

It is our understanding that this process will fulfill the City's Step 3 Milestone specified in the RFP. U.S. CAD proposes the following Tasks within Phase 2:

- 2.1 Civil and Survey Application Content and Interface Configuration Workshops
- 2.2 Civil and Survey Application Content Configuration

- 2.3 Architectural and MEP Application Content and Interface Configuration Workshops
- 2.4 Architectural and MEP Application Content Configuration
- 2.5 Data Migration
- 2.6 Administrator Training

Based on these required tasks, a proposed schedule has been developed and is shown below. This schedule will serve as a road map for the completion of Phase 2.

**Proposed Schedule – Phase 2**

	2024				2025				2026		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
<ul style="list-style-type: none"> <li>Phase 1 - Project Kick-Off, Preparation, and Finaliz...</li> </ul>	<p>Phase 1 - Project Kick-Off, Preparation, and Finalization of Business Requirements (Milestone Steps 1 and 2) ● Jan 1, '24 - Jan 1, '24 - 1</p>										
<ul style="list-style-type: none"> <li>Phase 2: Configuration, Interfaces, and Data Migra...</li> </ul>	<p>Phase 2: Configuration, Interfaces, and Data Migration (Milestone Step 3) ● Mar 18, '24 - Jul 26, '24 ● 131 days</p>										
2.5 Data Migration	<p>2.5 Data Migration</p>										
2.1 Civil and Survey Applicatio...	<p>2.1 Civil and Survey Application Content &amp; Interface Configuration Workshops (Milestone Step 3)</p>										
2.3 Architectural and MEP Ap...	<p>2.3 Architectural and MEP Application Content &amp; Interface Configuration Workshops</p>										
2.6 Administrator Training	<p>2.6 Administrator Training</p>										
2.4 Architectural and MEP Ap...	<p>2.4 Architectural and MEP Application Content Configuration</p>										
2.2 Civil and Survey Applicatio...	<p>2.2 Civil and Survey Application Content Configuration</p>										

*\*The proposed schedule shown is an approximation only and does not account for delays resulting from unforeseen issues or the City project deadlines that may take priority over these tasks.*

#### Task 2.1: Civil and Survey Application Content and Interface Configuration Workshops

Based on the information gathered and discussions conducted during Phase 1, U.S. CAD work with Civil and Survey staff identify specific content and content priorities to be configured during Task 2.2. Autodesk content shall aid in project setup, design, and production of plans. These workshops will be hosted virtually utilizing an online whiteboard for collaboration and documentation.

In our experience, agencies that are successful in migrating and implementing the AEC Collection create an Implementation Project Core Team, commonly referred to as Early Adopters. This Team will consist of individuals that preferably have previous Autodesk experience but more importantly have a firm understanding of the content and tools each Functional Area requires to complete day-to-day tasks efficiently. To ensure project success, the City should assemble an Implementation Project Core Team that includes staff members from the specific Functional Areas for which content will be created.

Project Core Team staff dedication to the implementation project is anticipated to be approximately 8 hours per week. Recommended Sections with the corresponding number of contributors are listed below:

- Civil: 4 Minimum
- Survey: 2 Minimum
- Architectural: 2 Minimum
- MEP: 2 Minimum

U.S. CAD will work with the City to help identify individuals that will have a positive impact and contribute to implementation success.

#### Task 2.2: Civil and Survey Application Content Configuration

During Task 2.2 U.S. CAD will work alongside Autodesk, key the City staff, and the Civil and Survey Implementation Project Core Team to develop the City Standard Autodesk Content.

This shall include the following areas of focus:

- Autodesk Workspaces and User Profiles
- Autodesk Block Libraries & Tool Palettes
- Autodesk Template(s) – up to 3 templates
  - AutoCAD Content
    - Layers
    - Linetypes
    - Annotation Styles (Dimensions, Text, Tables, Multileader)
    - Plot Styles
  - Civil 3D Content
    - Object Styles and Associated Content
    - Survey Styles & Database Settings
    - Label Styles
    - Table Styles
- Legacy Project Workflows/Best Practices

U.S. CAD and the City's Civil and Survey staff will determine which block libraries, Civil 3D Styles and other content are most frequently used to complete day-to-day tasks efficiently and agree upon a set

number to be developed for the configuration of standard content. U.S. CAD will train and mentor the Civil and Survey Implementation Project Core Team empowering them to create additional configurations of standard content by providing guidance and support at each step.

U.S. CAD will require additional meetings with key City staff and the Civil and Survey Implementation Project Core Team during Task 2.2 to assist in development and management of the above content. The existing City of San Diego Bentley content may be used in the process of migrating content; however new content will be developed in areas where needed. In many agencies, existing Bentley content is often archived as the newer workflows dictate the development of new Autodesk content to help capture efficiency gains.

**Task 2.3 Architectural and MEP Application Content and Interface Configuration Workshops**  
Based on the information gathered and discussions conducted during Phase 1, U.S. CAD work with Architectural and MEP staff to identify specific content and content priorities to be configured during Task 2.2. Autodesk content shall aid in project setup, design, and production of plans. These workshops will be hosted virtually utilizing an online whiteboard for collaboration and documentation.

**Task 2.4: Architectural and MEP Application Content Configuration**

During Task 2.4 U.S. CAD will work alongside Autodesk, key City staff, and the Architectural and MEP Implementation Project Core Team to develop the City's Standard Autodesk Content. This will include the following areas of focus:

- Autodesk Workspaces and User Profiles
- Autodesk Block Libraries & Tool Palettes
- Autodesk Template(s) – up to 3 templates
  - AutoCAD Content
    - Layers
    - Linetypes
    - Annotation Styles (Dimensions, Text, Tables, Multileader)
    - Plot Styles
  - Revit Content
    - Revit Templates
    - Standard Revit Families
    - Revit View Templates
- Legacy Project Workflows/Best Practices

U.S. CAD and the City Architectural and MEP staff will determine which content libraries, Civil 3D Styles and other relevant digital material that are most frequently used to complete day-to-day tasks efficiently and agree upon a set number to be developed for the configuration of standard content. U.S. CAD will train and mentor the Architectural and MEP Implementation Project Core Team empowering them to create additional configurations of standard content by providing guidance and support at each step.

U.S. CAD will require additional meetings with key City staff and the Architectural and MEP Implementation Project Core Team during Task 2.4 to assist in development and management of the above content. The existing Bentley content may be used in the process of migrating content; however new content will be developed in areas where needed. In many agencies, existing Bentley content is often archived as the newer workflows dictate the development of new Autodesk content to help capture efficiency gains.

### Task 2.5 Data Migration

U.S. CAD is committed to helping the City to continuously access the database of Bentley files and resources. In our experience with other agencies, consulting and supporting our partners in the ownership of converting these files, either as a whole in batches or individually, has been beneficial to the success of their implementations.

In this Task, U.S. CAD will provide advice, consult, and our collective professional experience to help the City make the best decisions and utilize the most relevant, accurate tools to convert as well as quality check converted files.

### Task 2.6 Administrator Training

The City staff will work closely with U.S. CAD to identify the correct number of staff to be involved during the execution of Phase 2. The goal of Task 2.5 is to educate the City staff members who will be charged with administering and managing the Autodesk environment and the content beyond the scope and timeline of this proposal. Training will include the maintenance and customization of user profiles, configuration, Civil 3D Styles, and maintenance of the workspace. Education will occur through involvement in the execution of previous tasks, but there will be targeted training delivered to this small group focused on:

- Autodesk Account Administration
- Autodesk Installations, Updates, and Deployments
- Autodesk Data Management Solution Administration

### Phase 2: DELIVERABLES

- City Autodesk Civil 3D drawing template (.dwt)
- City Section Sheet plan production template (.dwt)
- City Plan and Profile plan production template (.dwt)
- Developed and Configured Civil 3D Content
- Autodesk Block Library
- City of San Diego Autodesk Revit template(s)
- Autodesk Revit View Templates
- City Autodesk Revit Standard Family Libraries
- Software Administrator/CAD Manager Training and Education
- End-User Documentation

### Phase 2: ASSUMPTIONS

- U.S. CAD will adjust the implementation and training plans to meet the needs of the City
- Timing and schedules may be adjusted based upon success planning efforts in this phase.
- The City will provide existing Bentley data and examples to expedite Autodesk Content
- The City would like to ensure the interoperability of design files and a common layering and plotting scheme is preferred.

### Phase 3: Workflow Development and Acceptance Testing

The Tasks in Phase 3 are designed to allow detailed mapping of workflows for Autodesk software. U.S. CAD will host workshops to collaborate with key City of San Diego staff and map appropriate Autodesk workflows against requirements and existing Bentley workflows. Below are the proposed tasks within Phase 3:

It is our understanding that this process will fulfill the City's Step 4 and 5 Milestones specified in the RFP. U.S. CAD proposes the following Tasks within Phase 3.

- 3.1 Civil Workflow Development
- 3.2 Survey Workflow Development
- 3.3 Architectural Workflow Development
- 3.4 MEP Workflow Development

Based on these required tasks, a proposed schedule has been developed and is shown below. This schedule will serve as a road map for the completion of Phase 3.

**Proposed Schedule- Phase 3**



*\*The proposed schedule shown is an approximation only and does not account for delays resulting from unforeseen issues or the City project deadlines that may take priority over these tasks.*



### **Task 3.1 through Task 3.4: Civil, Survey, Architectural, and MEP Workflow Development**

In Phase 3, U.S. CAD will work with the City to develop workflows based upon existing Bentley workflows. U.S. CAD anticipates multiple workshops per functional area to identify and develop appropriate workflows within Autodesk software.

U.S. CAD will host workshops and document existing workflows. During these sessions, similar Autodesk workflows will be presented with solicitation of comments and feedback. U.S. CAD will use the documentation to develop Autodesk workflows for the City based on the collaborative efforts. These workflows will be presented and any final feedback from the City will drive the final development before training and testing commence.

Within each task, U.S. CAD will provide training to allow the City to effectively test developed workflows for acceptance. At the conclusion of this testing, U.S. CAD will make necessary adjustments to documented workflows prior to final delivery.

#### **Phase 3: DELIVERABLES**

- Documented Autodesk workflows for:
  - Civil
  - Survey
  - Architectural
  - MEP
  - Data Management

#### **Phase 3: ASSUMPTIONS**

- The City will provide relevant, existing workflows and documentation.
- The City prefers workflows where models are interoperable.
- U.S. CAD will be available to the City during workflow testing for questions and software guidance.
- U.S. CAD will continue to work with the City to refine and develop workflows throughout the life of this project.

#### **Phase 4: Training**

Based on U.S. CAD's experience with similar engagements, a foundational AutoCAD course is essential to every project member. For Civil 3D users, AutoCAD is the base for Civil 3D, so AutoCAD skills are essential. Revit users need an AutoCAD understanding to work with consultants who don't utilize Revit software, to effectively interface with AutoCAD based files (Civil and Map 3D), and to easily generate geometry that may be used within Revit models.

With a solid AutoCAD base, Civil 3D and Revit users can productively work together and share design data leading to better collaboration and more productive project teams.

With this knowledge, users will split off into their respective disciplines. Revit users will choose between Architecture and MEP fundamental courses before learning more advanced Revit topics.

Civil 3D users will learn the fundamentals of Civil 3D as a base before learning more about advanced tools such as GIS features and functions with Map 3D, or Hydraulic Modeling with Autodesk Storm Water Solutions training and ultimately Civil 3D advanced topics.

Survey users will learn Civil 3D, but with a focus on the Survey tools and Survey Database.

All users will learn to interface with Autodesk's Data Management software through their respective applications and as a whole before moving on to Phase 5.

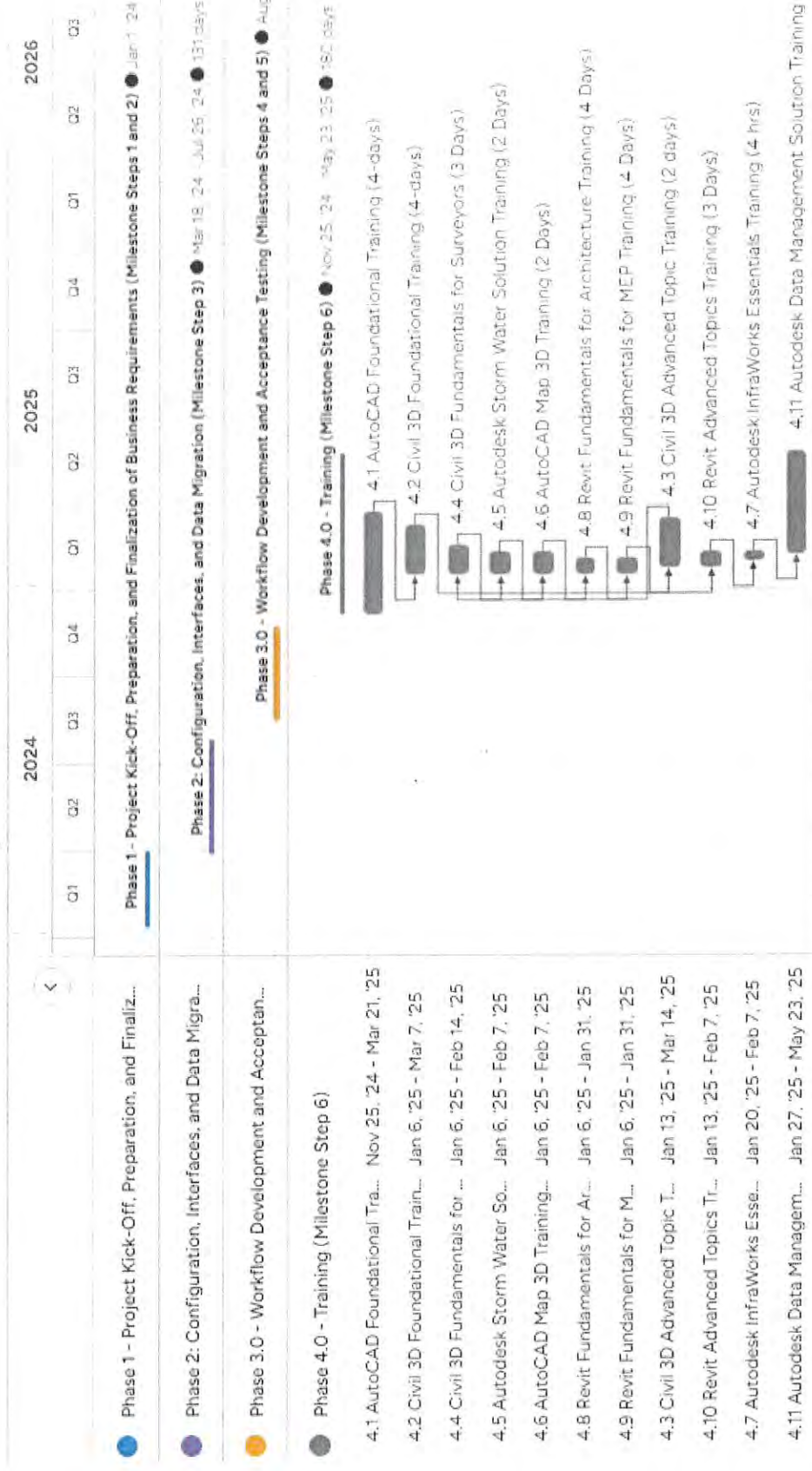
Below are the proposed tasks within Phase 4.

It is our understanding that this process will fulfill the City's Step 6 Milestone specified in the RFP. U.S. CAD proposes the following Tasks within Phase 4:

- 4.1 AutoCAD Foundational Training
- 4.2 Civil 3D Foundational Training
- 4.3 Civil 3D Advanced Topics Training
- 4.4 Civil 3D Fundamentals for Surveyors
- 4.5 Storm Water Training
- 4.6 AutoCAD Map 3D Training
- 4.7 Autodesk InfraWorks Essentials Training
- 4.8 Revit Fundamentals for Architecture Training
- 4.9 Revit Fundamentals for MEP Training
- 4.10 Revit Advanced Topics Training
- 4.11 Autodesk Data Management Solution Training

Based on these required tasks, a proposed schedule has been developed and is shown below. This schedule will serve as a road map for the completion of Phase 4.

**Proposed Schedule- Phase 4**



*\*The proposed schedule shown is an approximation only and does not account for delays resulting from unforeseen issues or the City project deadlines that may take priority over these tasks.*

#### Task 4.1: AutoCAD Foundational Training

This 4-day course begins with learning the basic tools for creating and editing 2D drawings. It then continues to explore the tools used to annotate drawings by adding text, hatching, dimensions, and tables. More advanced tools, such as working with blocks and setting up layouts, are introduced to improve efficiency with the software.

The learning objectives for this course are as follows:

- Understand AutoCAD's User Interface
- Use basic drawing, editing, and viewing tools
- Use layers for drawing organization
- Work with Blocks
- Prepare a Model to be Printed
- Add Text, Hatching, and Dimensions

Topics presented during this course are as follows:

- Getting Started with AutoCAD
- Drawing and Editing Commands
- Drawing Precision
- Making Changes to Drawings
- Layers
- Advanced Object Types
- Analyzing Object Properties
- Advanced Editing Commands
- Introduction to Blocks
- Setting up a Layout (Printing)
- Printing/Plotting
- Text
- Hatching
- Dimensions

#### Task 4.2: Civil 3D Foundational Training

This 4-day course will teach techniques that enable students to organize project data, work with points, create and analyze surfaces, model road corridors, create parcel layouts, perform grading and volume calculations and layout pipe and pressure networks.

The learning objectives for this course are as follows:

- Understand Civil 3D's User Interface and Tools
- Organize Project Data
- Import, Create, and Modify COGO Points
- Create and Modify TOPO Surfaces
- Perform Grading Tasks and Workflows
- Perform Corridor Tasks and Workflows
- Perform Piping Tasks and Workflows

Topics presented during this course are as follows:

- Civil 3D Interface

- Survey Point & Linework
- Surfaces
- Alignments
- Profiles
- Corridors
- Grading
- Pipe Networks
- Project Explorer
- Plan Production
- Styles and Settings
- Project Management
- Parcels

#### Task 4.3: Civil 3D Advanced Topics Training

This 2-day course will present new, advanced Civil 3D workflows for transportation design tasks. Students will learn additional methods of creating and editing corridors and working with Alignments and Profiles, Feature Lines, and Grading Objects to effectively interact with Corridor models as well as how to model intersections, roundabouts, and other advanced interchanges.

The learning objectives for this course are as follows:

- Learn to create advanced Corridor models
- Understand Baselines, Regions, and Assemblies
- Effectively utilize existing design data to control Corridors

Topics presented during this course are as follows:

- Working with Corridor Baselines
- Working with the Intersection Builder
- Modeling Cul-De-Sacs
- Modeling Roundabouts
- Feature Lines and Corridors
- Data Controlled Corridors, Alignments and Profiles

#### Task 4.4: Civil 3D Fundamentals for Surveyors Training

This 2-day course will present techniques that enable students to organize project data, work with points, create and analyze surfaces, work with survey field data within Civil 3D and manipulate data to create existing conditions plans.

The learning objectives for this course are as follows:

- Civil 3D Interface
- Working with Points and Point Styles
- Importing Survey Data
- Automated Linework
- Survey Databases and Networks
- Working with Surfaces and Survey Data

Topics presented during this course are as follows:

- Civil 3D Interface

- Survey Setup
- Entering Linework
- Field Book Files
- Points with Connective Codes
- Points
- Surfaces
- Field to Finish

#### Task 4.5: Autodesk Storm Water Solution Training

This 2-day course will focus on the primary storm water design tool that U.S. CAD and the City choose to implement. Autodesk's AEC Collection includes several options, and U.S. CAD will work with the City to choose, develop, and implement the most appropriate solutions.

The learning objectives for this course are as follows:

- Understand how to model Storm Water networks.
- Understand how to analyze Storm Water networks.
- Understand how to interface with other AEC Collection software

Topics presented during this course are as follows:

- Data Input/Export
- Modeling a Storm Water Network
- Editing a Storm Water Network
- Analyzing a Storm Water Network
- Managing Storm Water Network Projects

#### Task 4.6: AutoCAD Map 3D Training

This 2-day course will introduce Public Utilities and Environmental Services to drawing-based and geospatial features within the AutoCAD Map 3D software. Users learn about the features and functions of the AutoCAD Map 3D software, including how to create, manage, and map data.

The learning objectives for this course are as follows:

- Understand the Map 3D Interface
- Create and Edit Mapping Geometry
- Use Object Classifications
- Work with Raster Images & Source Drawings
- Use Drawing Queries
- Create Map Books and Plot Maps

Topics presented during this course are as follows:

- Creating and Editing Geometry
- Drawing Based Attributes
- Object Classifications
- Importing and Exporting Data
- Geospatial Environment
- Raster Images
- Query Map data

- Stylizing and Plotting Maps

#### Task 4.7: Autodesk InfraWorks Essentials Training

This 2-day course is designed for people using InfraWorks and/or the Autodesk AEC Collection. This course will provide students with a fundamental knowledge of the accelerated design process that uses data-rich 3D models with high-end visualizations.

The learning objectives for this course are as follows:

- Road Design Workflow, Traffic Simulations
- Bridge Design and Simulation Workflow
- Drainage Design and Analysis
- Working with Point Clouds
- Interfacing with Civil 3D

Topics presented during this course are as follows:

- InfraWorks User Interface
- Connecting & Stylizing Data
- Roadways
- Waterways and Drainage
- Bridges, Railways, Tunnels
- Model Elements
- Analyzing the Model
- Design Communication

#### Task 4.8: Revit Fundamentals for Architecture Training

This 3-day course will enable students to create full 3D architectural project models and set them up in working drawings. Students will learn how to use the Revit Architecture workspace and interface to draw floor plans with walls, windows, and doors, as well as create sections, elevations, and 3D views. Students will then learn to combine these elements into annotated construction documents.

The learning objectives for this course are as follows:

- Understanding of the purpose of BIM and how it is applied in Revit.
- Navigate a Revit Model, Link CAD Files
- Create Levels and Grids
- Work with the Project Browser and Views
- Work with basic sketching and modifying tools.
- Create a 3D building model with columns, walls, curtain walls, windows, and doors.
- Work with Floors, Ceilings, and Roofs within a building model.
- Set Up Sheets for Plotting

Topics presented during this course are as follows:

- Introduction to BIM and Autodesk Revit
- Starting a Project
- Working with Views
- Revit Families
- Basic Sketching and Modifying Tools

- Adding Columns
- Adding Walls
- Working with Doors and Windows
- Modeling Floors
- Modeling Ceilings
- Modeling Roofs
- Modeling Stairs, Railings, and Ramps
- Creating Construction Documents
- Working with Annotations
- Adding Tags and Schedules
- Creating Details

#### Task 4.9: Revit Fundamentals for MEP Training

This 3-day course will introduce users to the user interface and the basic HVAC, electrical, and piping/plumbing components that make Autodesk Revit a powerful and flexible engineering modeling tool. The guide will also familiarize users with the tools required to create, document, and print the parametric model. The examples and practices are designed to take users through the basics of a full MEP project from linking in an architectural model to construction documents.

The learning objectives for this course are as follows:

- Understanding of the purpose of BIM and how it is applied in Revit.
- Navigate a Revit Model, Link CAD Files
- Create Levels and Grids
- Work with the Project Browser and Views
- Work with basic sketching and modifying tools.
- Linking Architectural Models, Creating Spaces and Zones
- Create and work with HVAC and Plumbing Networks
- Creating and work with Electrical Circuits
- Test Duct, Piping, and Electrical Systems
- Setting up Sheets for Plotting

Topics presented during this course are as follows:

- Introduction to BIM and Autodesk Revit
- Starting a Project
- Basic Sketching and Modifying Tools
- Starting Systems Projects
- Working with Views
- Spaces
- Basic System Tools
- HVAC Systems
- Plumbing Systems
- Advanced Systems for HVAC and Plumbing
- Electrical Systems
- Creating Construction Documents
- Annotation and Construction Documents
- Adding Tags and Schedules



#### Task 4.10: Revit Advanced Topics Training

This 2-day course covers BIM Management for all Revit disciplines. Topics include creating custom templates with annotation styles, title blocks, and custom element types; Create schedules, including material takeoff schedules with formulas; Create custom wall, roof, and floor types; Set up a family file, Create family geometry; Create family types; Create specific families, including, in-place families, profiles, annotation, and shared parameters.

The learning objectives for this course are as follows:

- Create custom Revit Templates
- Create and work with Schedules.
- Create custom wall, roof, and floor types as well as MEP system families.
- Set up and work with component family files.
- Work with component visibility.
- Create in place families, profiles, annotations, and parameters.

Topics presented during this course are as follows:

- Creating Custom Templates
- Creating Schedules
- Custom System Families
- Component Family Concepts
- Advanced Family Techniques
- Additional Family Types
- Architectural Specific Families
- MEP Specific Families
- Structural Specific Families

#### Task 4.11: Autodesk Data Management Solution Training

This 4-hour course will teach students how to work with the data management solutions from Autodesk to store, access and share design data produced with Autodesk software. This solution will be introduced functionally within foundational training sections. This course will round-out the solution workflow for all City of San Diego staff.

The learning objectives for this course are as follows:

- Storing Data
- Sharing Data
- Accessing Data
- Project Management

Topics presented during this course are as follows:

- Working with Autodesk Data Management Solutions
- Accessing Data Locally and in the Cloud
- Accessing Projects
- Project Management Practices

#### Phase 4: DELIVERABLES

- Updated Training Plan and Schedule

- Training Courses hosted Onsite or Virtually
- Training Manuals for each user in each course
- Recorded copies of each virtual training course

**Phase 4: ASSUMPTIONS**

- Discovery and Success Planning efforts will help to hone the Training Plan.
- Training will be tailored to the City requirements and workflows.
- The City may require more/less training than has been identified.

**Phase 5: Cut Over and Acceptance**

U.S. CAD is recommending a dual software platform throughout Phases 1 through 4. U.S. CAD foresees the City maintaining dual software platform prior to launching a full Autodesk solution within the City. Our experiences during software migration have shown that it is good practice to retain licenses of the legacy software. Although there are methods of translating legacy data to Autodesk solutions without the Bentley software, having the Bentley software to verify the translated data can be beneficial. Once the legacy data has been migrated into Autodesk solutions a dual platform is no longer necessary. In some cases, a few licenses of the legacy software are retained allowing for unforeseen needs.

During Phase 5 U.S. CAD and the City will identify a project as a Production Project. U.S. CAD will aid the City's staff on identifying the best workflows, processes, and procedures for consuming, creating and delivering a project entirely in the Autodesk software environment. Phase 5 will include U.S. CAD providing mentoring to the City staff on specific department workflows that may need to be revisited from the training specified in Phase 4. U.S. CAD will facilitate the gap between training and production and guide the City staff on best practices to complete their projects in an Autodesk software environment. Below are the proposed tasks within Phase 5.

It is our understanding that this process will fulfill the City's Step 7 & 8 Milestones specified in the RFP. U.S. CAD proposes the following Tasks within Phase 4:

- 5.1 Cut Over and Acceptance
- 5.2 Stabilization Period

Based on these required tasks, a proposed schedule has been developed and is shown below. This schedule will serve as a road map for the completion of Phase 5.

### Proposed Schedule- Phase 5



*\*The proposed schedule shown is an approximation only and does not account for delays resulting from unforeseen issues or the City project deadlines that may take priority over these tasks.*

### Task 5.1: Cut Over and Acceptance

U.S. CAD will use the following criteria to gauge cut over for readiness and acceptance:

#### 1. Application Readiness

U.S. CAD will work with the City to ensure sufficient and complete development of Autodesk Content and all necessary Autodesk Software resources as outlined in this proposal. U.S. CAD will develop appropriate functional-area workflows in accordance with City of San Diego requirements and current workflows.

The City's Early Adopter (E.A.) Team will test Autodesk Content and template resources and report any irregularities/inconsistencies or errors with Autodesk software for U.S. CAD to resolve. This testing and reporting process should continue until the E.A. Team accepts the workflows provided and can agree to progress into a pilot project environment intent upon ensuring the base application environment is developed to a point where the broader City team can work productively within the Autodesk AEC Collection.

- Content Development
  - City of San Diego specific Autodesk Content
- Civil 3D Template Development
  - Object and Label Styles, Template Settings, Layers, Linetypes, Annotation Styles
- Revit Template Development
  - Annotations, View Templates, Sheets
- Workflow Mapping
  - Bentley to Autodesk Workflow Maps
    - Civil
    - Survey
    - Architectural
    - MEP
- Testing / Reporting
  - Autodesk Content, Templates, and Workflow Testing and Reporting
- Pilot Deployment
  - New Project, Pilot Project Use/Reporting

#### 2. Data Readiness

U.S. CAD has outlined a process to migrate DGN databases to native Autodesk DWG files and will work with the City to ensure accurate conversions and usable DWG resources during batch and 1 to 1 conversion of DGN files and resources.

Additionally, U.S. CAD and the City will load DWG resources into localized and/or cloud storage to be accessed by Autodesk AEC Collection software. Upon completion of migration and loading of converted DWG files, the City will work through a pilot project utilizing a copied converted DWG file set, and storage within the Autodesk file structure. A similar testing and reporting structure should be utilized to ensure that data issues are resolved prior to cut over.

- Data Migration
  - DGN Batch Conversions, 1-1 Conversions Identified

- Data Q/A & Cleanup
  - DGN to DWG Accuracy Checks/Archives
- Data Governance
  - Storage (localized and/or cloud) housing DWG projects
- Pilot Deployment
  - New Project, Pilot Project Use/Reporting

### 3. Technical Readiness

Prior to deployment of Autodesk software, U.S. CAD and the City will ensure that all computer system requirements and recommendations are met and/or exceeded. U.S. CAD will work with the City to assign Autodesk software users and appropriate software license access. Upon completion, the City can begin deploying Autodesk Software on test or E.A. Team workstations to begin pilot hardware/software configuration tests and reporting. Any known hardware issues/limitations should be addressed and/or noted prior to cut over.

- System Environment
  - Are Server/Workstations meeting recommended system requirements?
- System Authorization
  - Named Users, Software Licenses, Login Verifications
- Pilot Deployment
  - New Project, Pilot Project Use/Reporting

### 4. Business Readiness

U.S. CAD has outlined a training program that will tailor to the functional workflows identified for the City and all users will be trained to be productive in Autodesk AEC Collection software.

The City and U.S. CAD will work together to ensure that stakeholders are aware of progress, issues, and successes with a detailed change management plan.

U.S. CAD will work with the City to develop a detailed continuity plan that ensures the City can administer the Autodesk solution effectively and manage any potential issues that may arise. Additionally, U.S. CAD and the City will simulate risk factors to ensure an effective continuity plan.

- Training
  - Administrative and end-user training
- Organizational Change Management
  - Ensuring stakeholder inclusion and support
- Business Continuity Planning
  - Calculation of Risk, Planning for what might go wrong.
- Business Preparation Activities
  - Risk Simulation, test and report workarounds and fail safes.

### 5. Operational Readiness

A large portion of successful implementation is Technical and Product Support. U.S. CAD has outlined our support plan within this proposal and will work with the City to ensure our plan and systems are appropriate for the City and adjust where needed.

U.S. CAD's dedicated support staff will be available to the City, as well as our SME's and Technical Experts. U.S. CAD will work with the City to ensure understanding and the standard operating procedure

when interacting with our support mechanism to ensure timely and appropriate responses to support questions.

- Support Preparation and Planning
- Support Staff
- Transition to Support

#### 6. Cut Over Readiness

Prior to cut over begins, U.S. CAD and the City will perform a trial cut over with the E.A. Team to simulate actual cut over. Lessons from this activity will allow for finalization of the Cut Over Plan & Logistics.

Finally, a Cut Over Communication plan will ensure all parties involved are aware of the Cut Over Plan & Logistics as well as the Cut Over date.

- Trial Cut Over
  - E.A. Team Cut Over
- Cut Over Plan & Logistics
  - Documented steps, potential risks and instructions and critical logistics.
- Communications
  - Plan to ensure all involved parties are updated and aware of Cut Over activities.

Once the Cut Over is complete, the City will be starting new projects, and continuing any running projects utilizing the Autodesk solutions implemented. While there have been many testing sessions, pilot projects, and analyzation/documentation and training of workflows, the City end users may identify areas of improvement or inefficiencies as they become more comfortable with the software and standard processes. Additionally, Autodesk will continue to develop patches and functionality updates throughout the major release cycles of their products.

U.S. CAD will provide a mechanism through its Support Portal to document end-user suggestions and reports for review, and work with the City to implement changes as necessary based on this feedback. Furthermore, U.S. CAD will test and advise the City on product updates and enhancements related to all end-user inquiries during the Stabilization Period.

During the Stabilization Period, and for 12 months after this period is complete, U.S. CAD will provide Technical and Product Support to the City through phone and/or email exchange Monday through Friday from 8am-5pm PST. U.S. CAD has outlined our Technical Support operation within this proposal, and our front-line dedicated technical support staff is available to help directly in many cases. When necessary, our technical and subject matter experts are available to answer specific questions or solve more complex workflow questions or inquiries.

#### Task 5.2: Stabilization Period

During Task 5.2 U.S. CAD will provide the City with mentoring on new workflows, and guidance on productivity measures as natural workflow evolutions occur.

Additionally, U.S. CAD will provide technical support and maintenance to the City staff to ensure the most up-to-date products and a quick turn-around for solutions when problems arise.

#### Phase 5: DELIVERABLES

- Updated Cut Over Plan and Schedule

- Support Documentation and Relevant Update Content

**Phase 5: ASSUMPTIONS**

- By this point in the project, users have tested workflows and content to various degrees.
- This phase will serve as the finalization of cut over.

**Phase 6: Post Production Maintenance and Support**

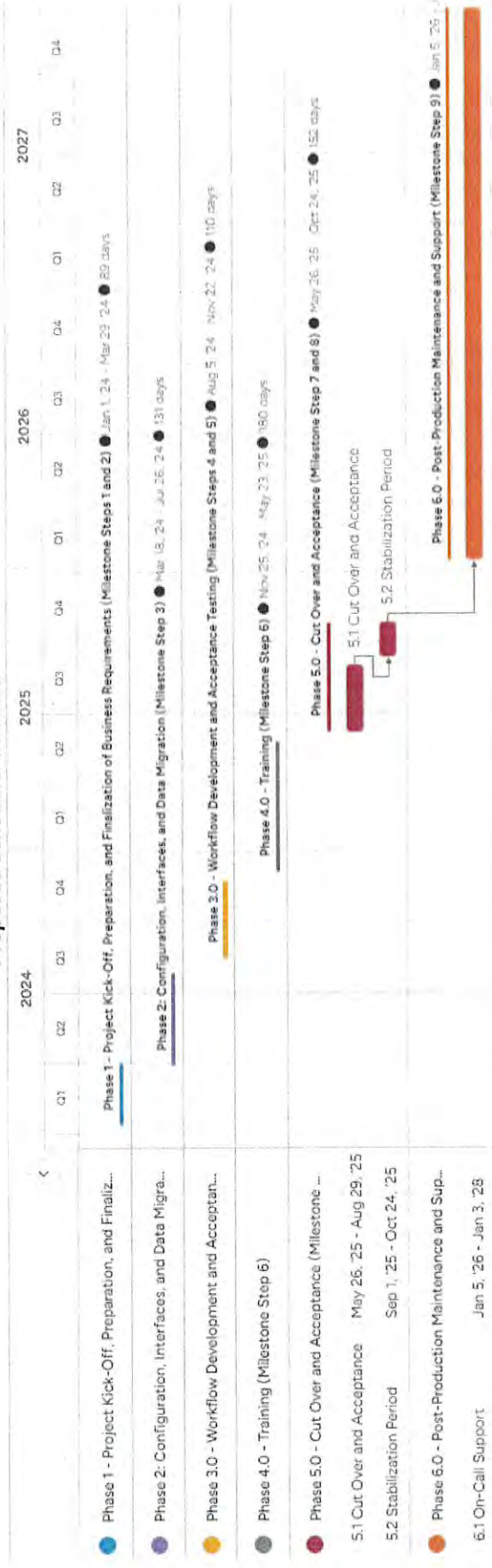
The goal of ongoing annual maintenance and support is to ensure that the new tools are fully integrated and that your users are comfortable and confident in using them for the duration of the contract.

U.S.CAD agrees to enter an initial maintenance and support period, of 12 months, immediately following the implementation of the solution(s) and acceptance by the City (City). This 12 month period of maintenance and support is budgeted as remote support with up to 1 week on-site per quarter.

US CAD will provide 2 additional years of On-Call Support and Maintenance. During these 2 years the City will receive remotely supported Product updates and Enhancement workshops that will help to ensure that the implementation is successful and that the full benefits of the new tools is realized.

Based on these required tasks, a proposed schedule has been developed and is shown below. This schedule will serve as a road map for the completion of Phase 6.

### Proposed Schedule- Phase 6



*\*Proposed schedule shown is an approximation only and does not account for delays resulting from unforeseen issues or the City of San Diego project deadlines that may take priority over these tasks.*



**3. Responsive proposals should provide straightforward, concise information that satisfies the requirements noted herein. Emphasis should be placed on conformity to the requirements of this RFP (with only limited exceptions requested), completeness of the proposal, and clarity of content. Any false or misleading statements found in the proposal may be grounds for disqualification.**

No response necessary.

#### D. Support Services

**1. The Contractor shall provide on-going, comprehensive support for day-to-day operations and maintenance. The contractor shall provide on-site and virtual support services to facilitate enhancements, customizations, configurations, troubleshooting and deployment of the CADD applications. These resources must be available during core business days, Monday through Friday - 6:00 a.m. to 6:00 p.m. (Pacific Time) at multiple locations.**

The Team understands the need for the City to provide timely and comprehensive Maintenance and Support capabilities for its end-users. Autodesk software solutions include many COTS capabilities to assist with this effort and help keep teams productive and reduce downtime.

As a part of the purchase of Autodesk AEC Collection software, both Autodesk and U.S. CAD provide a base level of software technical support. This includes web-based support, telephone support, and access to a ticket tracking system. This base-level technical support is included at no additional cost to City of San Diego during this migration and implementation period.

U.S. CAD will make live support available to all City users Monday through Friday beginning at 6:00 am PST each day and ending at 6:00 pm PST each day, excluding Federal Holidays. Technical support requests received outside of those hours will be addressed on the next business day. U.S. CAD will provide a job aide to all City users that will clearly describe the support options.

The Team proposes a hybrid approach of on-site and virtual support. On-site activities are specifically mentioned in the description below and all other support services will be handled remotely. Pricing reflects this approach. Should additional on-site efforts be required by the City, then the cost, hours, and efforts would need to be revised accordingly.

U.S.CAD agrees to enter an initial maintenance and support period, of 12 months, immediately following the implementation of the solution(s) and acceptance by the City (City). This 12 month period of maintenance and support is budgeted as remote support with up to 1 week on-site per quarter.

The goal of ongoing annual maintenance and support is to ensure that the new tools are fully integrated and that your users are comfortable and confident in using them.

US CAD will provide two (2) additional years of On-Call Support and Maintenance. During these two (2) years the City will receive remotely supported Product Updates and Enhancement workshops that will help to ensure that the implementation is successful and that the full benefits of the new tools are realized.

**2. The contractor will be responsible for creating application packages and deployments utilizing the City's System Center Configuration Manager (SCCM) deployment packaging system. This will also include providing exemption reports for those applications that failed.**

Because there are multiple ways of deploying Autodesk software, U.S. CAD will coauthor and collectively define the process with the City as a part of the Implementation Framework .

U.S. CAD will focus on helping the City plan and design a deployment strategy that meets the project's specific needs and goals. This approach will provide the best possible outcome, while still allowing the City to retain control over the installation process. After a deployment strategy has been mutually agreed upon, U.S. CAD will assist the City with creating and managing the software deployment images of all products within your Autodesk portfolio, utilizing the Team's IT consultant, Worksters, as-needed for Quality Assurance and/or additional on-site assistance.

## E. Product Licenses

**1. System User Software License Agreements. Contractor shall provide a copy of all System User software license agreements they will be requesting the City to execute. The license agreements should address all software components including third-party software, base system software provided by the Contractor, and custom software developed specifically for this project. The software license agreements provided should be the actual documents (or exact duplicates) of the forms used for this project, not a typical sample document.**

The Autodesk software terms and conditions ("Autodesk Terms of Use") are available online at the following link (or at any successor site as designated by Autodesk):  
<https://www.autodesk.com/company/terms-of-use/en/general-terms>.

For ease of reference, below please find links to the terms and conditions that make up the Autodesk Terms of Use:

General Terms: <https://www.autodesk.com/company/terms-of-use/en/general-terms>

Special Terms: <https://www.autodesk.com/company/terms-of-use/en/special-terms>

Subscription Benefits: <https://www.autodesk.com/company/terms-of-use/en/subscription-benefits>

Subscription Types: <https://www.autodesk.com/company/terms-of-use/en/subscription-types>

The City's use of the Autodesk software is subject to the Autodesk Terms of Use, and the City will need to acknowledge acceptance of Autodesk Terms of Use at the date of signature of the Contract between DLT and the City. Additionally, please note that the Autodesk Terms of Use are non-negotiable, and that Autodesk reserves the right to update the Autodesk Terms of Use at any time. As such, the Autodesk Terms of Use currently posted at the link above may vary throughout the term of this project. Moreover, a specific agreement will not be drafted for this project.

**a. Licensing Model. Contractor shall clearly indicate the nature of their Solution's licensing model (i.e., Named User, Concurrent User, Flat Subscription, or volume-based metrics [e.g., transactions, unlimited 'enterprise' style licensing or named licenses]).**

The Autodesk subscriptions to be provided under this RFP are Named User/Single-User Subscription. For ease of reference, we have copied below the description of Named User/Single-User Subscription found under Subscription Types of the Autodesk Terms of Use (for more information, please refer to Autodesk's Terms of Use, Subscription Types: <https://www.autodesk.com/company/terms-of-use/en/subscription-types#offering-types> or any successor site as designated by Autodesk):

#### Named- User Offering Types

*"For any offering type described as "single-user," "individual" or "named user," the Authorized User must (i) be identified by a unique user identification ("Autodesk ID") and (ii) be an individual. The Authorized User must log in using his or her Autodesk ID to install and/or access each Offering, and no one else may access and/or use such Offerings using the same Autodesk ID."*

#### Single-User Subscription

*"If Your subscription is described as "single-user," "individual" or "named user," then You may only assign such subscription to one (1) of Your Authorized Users. Your Authorized User may install Software on up to three (3) Electronic Devices; however, Your Authorized User may only use the Software on one (1) Electronic Device at a time.*

*Likewise, for a Collection, Your Authorized User may install the Software titles in a Collection collectively on up to three (3) Electronic Devices. Your Authorized User may simultaneously use any Software titles in the Collection, provided that any such use is only on one (1) Electronic Device at a time.*

*You may administratively reassign Your single-user subscription from one individual Authorized User to another individual Authorized User if You follow and complete Autodesk's policy and process for reassignment. This includes, but is not limited to, ensuring that each individual Authorized User has a unique Autodesk ID, and that the single-user subscription is assigned to the Autodesk ID for the individual Authorized User who is actually accessing and using the subscription."*

Please note that Autodesk reserves the right to update the Autodesk Terms of Use at any time. As such, the Autodesk Terms of Use currently posted at the link above may vary throughout the term of this project.

***b. License Transfer. Solution licensing must be easily transferred by a City Administrator, should the need occur (e.g., member of staff leaves the organization).***

The City retains the rights to assign and unassign subscriptions to its Authorized Users as that term is defined in the Autodesk Terms of Use at the City's discretion.

Please refer to Global Use Rights for Single-User Subscriptions from the subscription benefits page in Autodesk's Terms of Use: <https://www.autodesk.com/company/terms-of-use/en/subscription-benefits#global-use-rights> (or any successor site as designated by Autodesk).

Please note that Autodesk reserves the right to update the Autodesk Terms of Use at any time. As such, the Autodesk Terms of Use currently posted at the link above may vary throughout the term of this project.

***c. Licensing Volume Changes. Solution must allow the City to increase or decrease its licensing requirements through the duration of the contract.***

The software subscription pricing provided as part of this response reflects increased discounts on incremental increases in license numbers from year 1 to year 5. DLT cannot agree to a decrease in subscriptions based on this pricing schedule and pricing. If the City would like a more consistent pricing model with a flat number of subscriptions and discount across all years, with the ability to receive increased discounts as new subscriptions are added, DLT is open to negotiate a different pricing

schedule to reflect this.

***d. Unused Licensing Volume. Solution must allow the City to 'roll-over' unused licensing (e.g., transactions into subsequent contract terms, should the City choose to exercise its right to extend the Contract term).***

Please note that Autodesk does not allow end users to "roll-over" unused subscriptions. Therefore, the City will be unable to roll-over unused subscriptions into subsequent contract terms and will not receive a refund for any unused subscriptions.

***e. Overage Costs. Solution must clearly describe the circumstances and thresholds (if any) under which the City may become liable for overage costs (e.g., exceeding bandwidth, storage, transactions, etc.).***

No Overage Costs are foreseen as part of this offer.

***f. Not-to-Diminish Rights. Any resulting agreement between the City and Contractor will ensure that the functionalities of the solution purchased, irrespective of whether it has been purchased as a set of more than one software product supplied as a single price, will be retained for the duration of the agreement, inclusive of any agreed extensions. Any resulting incremental unitary purchases of software will be made against the same software originally purchased under this agreement.***

Please note that the software provided by Autodesk is considered "commercial, off the shelf software" generally available for purchase in the market and is provided "as is" and "as available". Autodesk reserves its right in Section 21.1 Changes to the Offerings of the Autodesk Terms of Use (<https://www.autodesk.com/company/terms-of-use/en/general-terms> or any successor site as designated by Autodesk) to "from time to time to (and You acknowledge and agree that Autodesk may) (i) modify or release subsequent versions of an Offering, or may discontinue an Offering and/or provide instead a substitute Offering; (ii) modify or discontinue the Benefits, features and functionality, or supporting services or availability with respect to an Offering, whether generally or in any geographic area or language; or (iii) add or modify license keys, authorizations or other means of controlling access to or use of the Offerings. Autodesk will endeavor to inform You of major changes to the Offerings."

Please note that Autodesk reserves the right to update the Autodesk Terms of Use at any time. As such, the Autodesk Terms of Use currently posted at the link above may vary throughout the term of this project.

***g. Third Party Use. Contractor will grant City a non-exclusive license during the Contract Term to install and/or execute solution on machines operated by or for City solely to facilitate City's authorized access to and use of the acquired solution. City's primary third-party information technology service providers shall have access to and use of the Solution solely to provide support for City's internal business use.***

The City's answer to Question 45 in the Addendum dated April 14, 2023 where the City answers that the Third Party use contemplated in this section "...is the same as the standard use of the software." Based on that answer, the Third Party Use would be allowed under as use by an Authorized User as that term is defined in Autodesk's Terms of Use. Please refer to the Authorized User Definition in Autodesk's Terms of Use (copied below for ease of reference).

*“Authorized User means (i) You (if You are an individual) and (ii) identified individuals (such as Your individual employees, consultants and contractors and other individuals accessing and using an Offering) for whom You have acquired a subscription to an Offering. If an Offering allows You to designate Authorized Users for such Offering, You will be responsible for providing notice to, and obtaining agreement from, any such Authorized Users regarding the application of these Terms to their access to and use of such Offering prior to their access and use.”*

Please also refer to Global Use Rights for Single-User Subscriptions, under the Subscription Benefits page of Autodesk’s Terms of Use: <https://www.autodesk.com/company/terms-of-use/en/subscription-benefits#global-use-rights> (or any successor site as designated by Autodesk).

Note that Autodesk reserves the right to update the Autodesk Terms of Use at any time. As such, the Autodesk Terms of Use currently posted at the link above may vary throughout the term of this project.

## F. Upgrades, Updates, Maintenance and Service Level Requirements

**1. The contractor will be responsible for providing the City with application version upgrades of CADD applications and updates as needed. The contract is required to provide all application maintenance and they are completed in a timely manner, technical support is available to the City of San Diego applications are on the current version. Contractors shall make available to City all upgrades, updates, and versions to the software, as they are released, at no additional charge. These changes must be scheduled with City in advance to test and communicate out to all affected users.**

Autodesk, as a subcontractor, is limited to providing commercial-off-the-shelf software subscriptions (“COTS”). Any upgrades or updates would be made available, not “as needed” by the City, but as they would be made generally available to all customers with a subscription to the same products. The City would be responsible for deploying all updates and upgrades. Instructions for supporting this process are available at the following link: <https://www.autodesk.com/support/download-install/admins>. The City can self-manage and schedule at will when to deploy upgrades, updates and new versions of the Autodesk software. Autodesk will not agree to provide the City with notice of any updates or upgrades that require down time nor to schedule maintenance outside of the core City hours.

U.S. CAD will support and provide recommendations of installation and implementation for any releases, updates, hot fixes, etc.

DLT recommends that the City (i) keep updated with the latest Autodesk product updates, hotfixes, service packs, or security patches and(ii) that *Autodesk Access* be implemented (see the following link for additional information on Autodesk Access (<https://www.autodesk.com/products/autodesk-access/overview>)). Autodesk Access is automatically installed the first time you install an Autodesk application. The app runs in the background and alerts the user to any new updates that become available, so that the user will always be running the most current version of the Autodesk software available.

Another advantage of using Autodesk Access is that if a problem with the software occurs and it is necessary to get technical support directly from Autodesk, the Autodesk technician may require that all updates, hotfixes, and service packs be applied prior to any assistance being provided.

NOTE: The software administrator (or a City designee) can set up how and when the app notifies the end user and can set installation privileges by enabling or disabling features from within the main Autodesk

Account, including disabling the auto-update process.

***a. Scheduled Maintenance. Contractor will provide 72 hours' notice of any upgrades that require platform down time of over one (1) hour. Scheduled Maintenance will occur only outside of the core City hours of 8am to 5pm PT.***

Please note that Autodesk is only providing COTS subscriptions as a vendor to DLT, and cannot provide dedicated notices to a single customer, tailored to the customer's specific schedule. Specifically for cloud-based solutions, Autodesk's offerings are multi-tenant offerings, making it impossible to tailor maintenance scheduling to a single customer's needs.

Autodesk publishes notices of customer impacting scheduled system maintenance in the *Autodesk Health Dashboard* (<https://health.autodesk.com/>) for its Cloud Based SaaS Solution. Users can check the status of an ongoing product or service outage, or to view an upcoming maintenance schedule. Users can also sign-up for email notifications for when a service is not working, experiencing performance degradation or for a product upgrade.

For the Desktop Solution (assuming that with Off-Premises - Hosted the City refers to the Desktop solution), it is the duty of the software administrator, defined as the Primary Admin (<https://www.autodesk.com/support/account/admin/users/roles>), as appointed by the City, to inform the internal resources of the City to in case of system downtime due to scheduled upgrades.

As a Subscription Benefit, Autodesk provides rights to updates, which may include security fixes, hot fixes, patches and other updates (including new features, new functions and other modifications released between Upgrades), if and when made available to the City by Autodesk and determined by Autodesk to constitute an upgrade, both as defined in the Autodesk Terms of Use (<https://www.autodesk.com/company/terms-of-use/en/general-terms>). DLT strongly encourages the City to promptly install and use all updates made available to the City during the subscription period. Instructions for supporting this process are available here:  
<https://www.autodesk.com/support/download-install/admins>

While U.S. CAD will support and provide recommendations of installation, implementation for any releases, updates, hot fixes, etc., DLT suggests that the City keep updated with the latest Autodesk product update, hotfix, service pack, or security patch. To achieve this, DLT suggests that Autodesk Access (<https://www.autodesk.com/products/autodesk-access/overview>) be implemented. This application is automatically installed the first time you install an Autodesk application. The app runs in the background and alerts the user to any new updates that become available, so that the user will always be running the most current version of the Autodesk software available. Another advantage of using the Autodesk Access is that if a problem with the software occurs and it is necessary to get technical support directly from Autodesk, the Autodesk technician may require that all updates, hotfixes, and service packs be applied prior to any assistance being provided.

NOTE: The software administrator (or a City designee) can set up how and when the app notifies the end user and can set installation privileges by enabling or disabling features from within the main Autodesk Account, including disabling the auto-update process.

***b. Before scheduling any system downtime, Proposer will inquire with the City about the timing and only schedule the downtime upon reaching written agreement with the City about the time and duration.***

Please note that Autodesk is only providing COTS subscriptions as a vendor to DLT and cannot inquire with a customer about its scheduling of systems downtime. Autodesk's cloud-based solutions are multi-tenant offerings, making it impossible to tailor system downtime to a single customer's needs or schedule.

Autodesk publishes notices of customer impacting scheduled system maintenance in the Autodesk Health Dashboard (<https://health.autodesk.com/>) for its Cloud Based SaaS Solution. Users can check the status of an ongoing product or service outage or view an upcoming maintenance schedule. Users can also sign-up for email notifications for when a service is not working, experiencing performance degradation or for a product upgrade.

For the Desktop Solution (assuming that with Off-Premises - Hosted the City refers to the Desktop solution), system downtime and scheduled updates and upgrades are controlled by the software administrator, defined as the Primary Admin (<https://www.autodesk.com/support/account/admin/users/roles>), as appointed by the City.

***c. Hosting Facility Services. Contractors assumes all responsibility for the computing environment supporting the hosted applications.***

The Desktop Solution (assuming that with Off-Premises - Hosted the City refers to the Desktop solution) is used behind the City's firewall and the City is responsible for monitoring its own environment.

As far as the Cloud Based SaaS solution is concerned, Contractor is not the owner of the software solutions, which will be provided by Autodesk as a subcontractor to DLT. The extent of Autodesk responsibilities can be found in the Autodesk Trust Center (<https://www.autodesk.com/trust/overview>). Please also see Autodesk's Terms of Service on warranties related to the solutions.

Autodesk Cloud Services run in secure data centers owned and powered by Amazon Web Services (AWS). As such Autodesk, the subcontractor that would provide the hosted solution, does not have control of the AWS computing environment.

AWS provides boundary protections at the network level. Additionally, Autodesk employs a defense-in-depth strategy that uses a combination of process, technology, and physical security controls to help secure systems and its data from unauthorized access, use, or disclosure.

Autodesk maintains network configuration documentation for infrastructure deployed that supports Autodesk Forge. Autodesk leverages frameworks from Amazon to search for attacks presented in this risk. Autodesk leverages defense in depth deployment strategies and DDOS risk mitigation solutions provided by Amazon to mitigate risks.

Autodesk leverages most of the Amazon services suggested to mitigate impact from DDOS attacks as described in the AWS article <https://aws.amazon.com/answers/networking/aws-ddos-attack-mitigation/>. Amazon provides Network perimeter security services described starting in the Network Security section on page 13 of the AWS Security Overview Whitepaper:

<https://docs.aws.amazon.com/whitepapers/latest/introduction-aws-security/introduction-aws-security.pdf#welcome>.

Autodesk mitigates the risk of integrity attacks by using encryption in transit via HTTP between the customer and the Autodesk Cloud services.

For further reference, please consult <https://www.autodesk.com/trust/compliance#compliance-table>.

***d. Application Administration. Applications provided under this agreement will be the responsibility of the contractor. Contractor will own and manage the application, related databases, supporting computing software, and necessary operating systems. Data is owned by City of San Diego.***

The Autodesk software and the web services included in this proposal are licensed, not sold, by Autodesk to the end user (e.g., the City). Ownership of the software and web services and related intellectual property does not pass to DLT but remains with Autodesk. Please refer to the Autodesk Terms of Use Section 17 Autodesk Proprietary Rights (<https://www.autodesk.com/company/terms-of-use/en/general-terms#rights>), and Autodesk Terms of Use Section 5 “You Own Your Work” (<https://www.autodesk.com/company/terms-of-use/en/general-terms#own>) regarding customer’s ownership of its own proprietary data.

The City is responsible for ensuring they meet the minimum system requirements necessary to use the Autodesk software. Also, please refer to the following link for additional information on system requirements: <https://www.autodesk.com/support/system-requirements/overview>.

Additionally, please note that no hardware is included in this proposal.

U.S. CAD will support and provide recommendations on the application administration as needed.

***e. Application Administration. Applications provided under this agreement will be the responsibility of the contractor. Contractor will own and manage the application, related databases, supporting computing software, and necessary operating systems.***

The Autodesk software and the web services included in this proposal are licensed, not sold, by Autodesk to the end user (e.g., the City). Ownership of the software and web services and related intellectual property does not pass to DLT but remains with Autodesk. Please refer to the Autodesk Terms of Use Section 17 Autodesk Proprietary Rights (<https://www.autodesk.com/company/terms-of-use/en/general-terms#rights>), and Autodesk Terms of Use Section 5 “You Own Your Work” (<https://www.autodesk.com/company/terms-of-use/en/general-terms#own>) regarding customer’s ownership of its own proprietary data.

The City will be responsible for ensuring they meet the minimum system requirements. Please refer to the following link for additional information on system requirements <https://www.autodesk.com/support/system-requirements/overview>.

Additionally, please note that no hardware is included in this proposal.

***f. Ownership of Data. All data collected on behalf of the City of San Diego is the property of the City. None of the data will be used for any other purpose. Upon termination or expiration of any***



***contractual agreement, the Contractor will retain the City's data for a minimum of ninety (90) days and will transfer City data in its possession to the City at no cost by using a method that protects the confidentiality of the information being exchanged and as agreed upon by the City but, at a minimum, data records will be provided in ASCII comma, separated value (CSV) format, with binary images in TIFF, JPG, or PDF format. The City retains the right to test the data extraction process on an annual basis. Upon the expiration of the ninety (90) day period, Contractor and its hosted service provider shall have no obligation to maintain or provide any City data and shall thereafter, unless legally prohibited, delete in such a manner as prevents recovery through normal/laboratory means, all City data in its systems or otherwise in its possession or under its control.***

The City retains its ownership rights to files, designs, models, data sets, images, documents or similar material created by the City or the City's authorized users and submitted or uploaded to any Autodesk Offering by the City or the City's authorized users. Please see section 5 of the Autodesk Terms of Use for more information: <https://www.autodesk.com/company/terms-of-use/en/general-terms#own>.

Please note that the Autodesk Terms of Use, which are non-negotiable, will govern the City's use of the Autodesk Software. Refer to section 5 "You Own Your Work" (<https://www.autodesk.com/company/terms-of-use/en/general-terms#own>) regarding customer's ownership of its own proprietary data. Section 11.4 "Use of Your content" of Autodesk Terms of Use outlines when Autodesk may require or have access to your content.

Further, please review the Autodesk Terms of Use section 20.3 Effect of termination of subscription (<https://www.autodesk.com/company/terms-of-use/en/general-terms#termination>) for rights and obligations for extracting data at the end of term of subscription.

In addition, it is the City's obligation to back up their content through the term of the subscription.

## **2. Service Level Requirements**

***a. Uptime Availability. Contractor warrants that the Hosted Service will be available to be accessed by the City at least 99.5% (Uptime) of each calendar month during the Service Period.***

Please note that Autodesk is a global company that provides commercially available off the shelf ("COTS") software and not custom-developed software. Autodesk, the subcontractor that would provide the hosted solution/service, as a standard, does not offer service level agreements, uptime commitments, nor service credits and does not agree to customer/end user service level requirements. Autodesk has asked us to refer you to the Autodesk Health Dashboard <https://health.autodesk.com> (or any successor site as designated by Autodesk) to check the status of any ongoing product or service outages or to view any upcoming maintenance schedules and to the Availability page of the Autodesk Trust Center (<https://www.autodesk.com/trust/availability> or any successor site as designated by Autodesk) for additional information on Autodesk's procedures for critical activities, such as application release management, hardware and operating system upgrades, and system health monitoring.

***b. Uptime Availability Remuneration. Where Contractor fails to meet the Uptime Service Level, then City is entitled to claim the following prorated Service Credits against the annual Subscription Fee:***

<i>Uptime Percentage in a Full Calendar Month</i>	<i>Service Credit</i>
<i>99.5% to 100%</i>	<i>No credit: Uptime is met.</i>
<i>97% to 99.4%</i>	<i>5% of the prorated monthly Subscription Fee for the Services</i>
<i>95% to 96.9%</i>	<i>7% of the prorated monthly Subscription Fee for the Services</i>
<i>90% to 94.9%</i>	<i>10% of the prorated monthly Subscription Fee for the Services</i>
<i>Less than 90%</i>	<i>100% of the prorated monthly Subscription Fee for the Services</i>

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*c. Service Credit Calculation. Uptime Availability will be calculated monthly by Contractor and such calculation will be deemed binding on the parties in absence of manifest error. Uptime Availability is calculated based on the following formula:*

*UA = (T – M – D) / (T – M) x 100% where UA = Uptime Availability, T = Total Monthly Minutes, M = Scheduled Maintenance Minutes and D = Downtime Minutes. When calculating any Service Level, any failure to meet the Service Level that is directly or indirectly caused by any one or more of the following items shall not constitute a failure of the Service Level:*

- Scheduled Maintenance;*
- any of City’s Content and Software;*
- any unlawful, negligent or willful act or omission by City, City’s Agents, contractors or invitees or any other person; and*
- any Force Majeure event.*

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critical activities, such as application release management, hardware and operating system upgrades, and system health monitoring.

**d. Application Recovery. Contractor will provide the following Recovery Services:**

- **Hosting Infrastructure and environment recovery processes;**
- **Application recovery processes; and**
- **Offsite data backup storage and periodic testing of data backup**

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**e. Disaster Recovery. Contractor shall maintain and comply with a reasonable written Disaster Recovery Plan (DR Plan), setting forth the procedures for (a) keeping services functioning during and after an earthquake, hurricane, other natural disaster, war, act of terrorism, act of cyber-terrorism, and other man-made disaster, including without limitation force majeure; and (b) restoring Service functionality promptly after a disaster. The DR Plan will include procedures no less protective than industry standard, and Contractor shall update the DR Plan as the industry standard changes.**

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**f. Incident Management. Contractor provides Incident Management support for all application services covered by this Agreement. City will direct issues encountered with the services provided in this Agreement to an Incident Management or Customer Support contact as identified by <Provider>. Incidents will be assigned a priority level by the City based on the following criteria, and <Provider> shall use all commercially reasonable efforts to meet or exceed the following Service Level standards:**

<b>Level</b>	<b>Description</b>
<b>Priority Level 1 (P1)</b>	<b>Mission critical City business process(s) unable to function - the &lt;solution&gt; is not functioning and there is no workaround that is acceptable to the City, thereby preventing a department or workgroup from performing a mission critical business function(s).</b>
<b>Priority Level 2 (P2)</b>	<b>Significant impact to Mission Critical City business process(s) – a major problem impedes the ability to perform mission critical business function(s) due to major functionality not working. A temporary workaround that is acceptable to the City is available.</b>
<b>Priority Level 3 (P3)</b>	<b>Not able to accomplish all functions - minor function(s) not working causing non-critical work to back up.</b>
<b>Priority Level 4 (P4)</b>	<b>Inconvenience – the &lt;solution&gt; is causing a minor disruption in the way tasks are performed, but does not stop workflow. Able to accomplish all functions, but not as efficiently as normal. May include cosmetic issues - especially in constituent facing applications.</b>

	<b>Time to Respond</b>	<b>Response Credit</b>	<b>Time to Resolve</b>	<b>Resolution Credit</b>
<b>P1</b>	<b>100% responded to within 4 hours</b>	<b>10% of prorated monthly Service Fees</b>	<b>100% resolved within 24 hours</b>	<b>15% of prorated monthly Service Fees</b>
<b>P2</b>	<b>100% responded to within 8 hours</b>	<b>5% of prorated monthly Service Fees</b>	<b>100% resolved within 48 hours</b>	<b>10% of prorated monthly Service Fees</b>
<b>P3</b>	<b>100% responded to within 24 hours</b>	<b>3% of prorated monthly Service Fees</b>	<b>100% resolved within 5 Business Days</b>	<b>7% of prorated monthly Service Fees</b>
<b>P4</b>	<b>100% responded to within 72 hours</b>	<b>2% of prorated monthly Service Fees</b>	<b>100% resolved within 15 Business Days</b>	<b>5% of prorated monthly Service Fees</b>

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***g. Recovery Point Objective. In the event of a failover to a secondary data center, Contractor will restore a copy of the City's data that is less than or equal to two (2) hours old at the time of service disruption.***

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***h. Recovery Time Objective. The City will be able to resume service within four (4) hours after service disruption if a disaster incapacitates the primary data center.***

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***i. Support Method. Contractor should offer, at a minimum, an adequately staffed telephone support and E-mail support offering.***

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***j. Network Services. Contractor is responsible for providing adequate network infrastructure so as to meet the performance metrics specified in this Agreement. City is responsible for providing adequate internal network infrastructure so as to not affect the Vendor's ability to meet those performance metrics. City is responsible for the support, maintenance, and monitoring of the City's dedicated LAN and or WAN. Vendor bears no responsibility for performance and availability problems on networks within City's control.***

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***k. Periodic Reporting. Contractor will monitor and document its performance against the agreed Service Levels, and provide to the City a quarterly report demonstrating its performance against the agreed Service Level Requirement metrics, highlighting where any targets have been missed and providing to the City a Service Credit to the applicable value agreed when necessary.***

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***l. Termination for Service Levels Default. For the avoidance of doubt, if <Provider> fails to meet its Service Levels on three (3) consecutive monthly reporting periods, or fails to meet its Service Levels on four (4) monthly reporting periods through the course of a rolling twelve (12) month period then City will consider that <Provider> is failing to satisfactorily perform its Service Levels and may exercise its rights to terminate the Agreement for default.***

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## G. Cloud Hosting/ Software as a Service (SaaS)

**1. Contractor shall provide Cloud Hosting/ Software as a Service (SaaS) solution which must be approved by the City of San Diego Cyber Security Team during planning and prior to being implemented.**

DLT understands that any Cloud Hosting/SaaS solution provided under this RFP needs to be approved by the City of San Diego Cyber Security Team during planning and prior to being implemented. Please be aware that cloud hosting/SaaS solutions are multitenant solutions subject to Autodesk’s Terms of Use.

## H. Professional Services (Project Management, Overall Approach, Training & Support)

**1. Contractors shall provide a project plan for the milestone-based, fixed-price delivery of the implementation services.**

A Project Plan has been provided with this proposal in Exhibit F.

**a. Single Point of Contact: The Contractor must identify a single point of contact for all contract management activities. The Contractor’s Project Manager’s name and resume must be submitted with the proposal. The successful Contractor must not change the Project Manager without written City approval.**

The single point of contact for contract management will be Shaun Gaffrey of DLT. The single point of contact for project management will be Denver Galloway of U.S. CAD. Resumes for the Contract Manager and Project Manager (PM) are provided in Appendix C.

**b. Project Management Plan: The Contractor must contain a comprehensive and practical description of the Contractor’s plans for project management with regards to City staff engagement, implementation of the proposed solution, control mechanisms including staff organizational structure, progress reporting, major decision making, sign-off procedures, and internal control procedures. The Contractor shall also indicate flexibility in meeting changes in program requirements and coping with problems.**

### PROJECT MANAGEMENT PLAN (PMP)

The project management plan is an overlay to the delivery of services that addresses the management

of scope, timelines, resources, and stakeholders of the project. This plan is outlined as a process guide to coordinate efforts between departments and teams to accomplish the desired outcomes.

**City Staff Engagement:**

The U.S CAD PM will work directly with the City's PM to determine departments and teams to be engaged, coordinating all activities and providing regular communications as outlined in this Project Management Plan (PMP).

**Implementation of Proposed Solution and Control Mechanisms:**

The U.S CAD PM will prepare a more detailed PMP that will be used in concert with the Training Plan to assist the City with ensuring that the project team resources deliver against the scope of work.

The U.S CAD PM will create and maintain documentation for the following:

- Project Schedule / Timeline
- Project Status (Weekly / Monthly)
  - Communications
  - Project Weekly Updates
  - Project Monthly Status
  - Quality Assurance Meetings
  - Milestone Approvals
  - Budgetary Hours / Billing
- Change Management
  - Decision Log
- Document Control
- Project Closeout
  - Deliverable Approval Process
  - Closeout Presentation

Project Status

**Communication Plans**

Communication is a key component to project success. The purpose of a communication plan is to maximize efficiency and define who needs to be informed of project activity. The communication plan is intended to identify how information is disseminated, how often information is distributed, and who is responsible for the distribution and clear communication.

The U.S. CAD PM and City's PM are responsible for coordinating and communicating all project contract and implementation activities to meet the objectives of this project. All information and communication will pass through the Project PMs as the sole point-of-contact for project activity, formal status reporting, issue resolution coordination, and approval coordination. The methods of PM communication with regular cadence will include schedules.

A summary table of the Communication Plan can be found below and used as a guide.

**Communication Plan Summary Table (Quick Reference)**



TEAM COMMUNICATION METHOD & FREQUENCY					
Team	Method	Frequency	Goal	Owner	Audience
Project Management	e-mail, phone	As needed	All project activities are communicated to the PM.	PM	PM, cc Team Leads as necessary
Technical Lead	e-mail, phone	As Needed	Technical activities are communicated to the PM.	Technical Lead	Technical Leads, cc PM
Training Lead	e-mail, phone	As Needed	Training activities are communicated to the PM.	Training Lead	Training Leads, cc PM
Contract Manager	e-mail, phone	As Needed	Communicates contract issues as they arise	Contract Manager	Contract Managers, cc PM
End User - Technical	Support	As needed	Resolve Technical Support issues	Technical Support	Technical Support
End User - Training	e-mail	As needed	Resolve training related issues	Respective Training Lead	Training Lead, Technical Lead,
Coordination Meeting	Zoom	Weekly	Review project status and discuss issues or delays	PM / Assistant PM	PM - Project Core Team as necessary
Monthly Status Report	Zoom	Monthly	Project deliverables, feedback, discuss next phase/tasks	PM / Assistant PM	PM - Project Core Team as necessary

*Note: City of San Diego may establish internal communications to end-users regarding implementation. This table may be amended to reflect the City's established communication plan.*

#### **Weekly Coordination Meeting**

U.S. CAD's PM will schedule and conduct a weekly coordination meeting with the key Project Team personnel, including but not limited to, the City's PM. These meetings will focus on near term schedule activities (2 to 4 weeks forward), risks, and issues.

More specifically, the weekly topics will include the following:

- General Discussion
  - Project updates and weekly look-ahead
  - Action item tracking
- Project Schedule
  - Critical path tracking
  - Risk Management
- Deliverables

- Review status of deliverables
- Billing
  - Review status of existing billings
- Action Items
  - Description, Person(s) Responsible, and Deadline

U.S. CADs PM will host meetings via Zoom and will utilize an electronic solution to share, host, organize, and store the information and documents related to coordination meetings. Meeting minutes will be prepared by the U.S. CAD PM, shared with the City's PM, and posted to the agreed upon data sharing platform.

Weekly Coordination Meetings will begin one week following the Project Kickoff Meeting and continue until project completion. U.S. CADs PM and City's PM will determine any additional attendees for Weekly Coordination Meetings depending on the Phase/Task of the project. Meetings will vary in duration depending on the phase/task of the project but are anticipated to be 1-2 hours.

#### **Monthly Project Status Reports**

U.S. CAD's PM will issue a written Monthly Status Report. The Monthly Status Report will be reviewed by the City's PM, and City's PM will be responsible for communicating status through the City project organization. Monthly Status Reports will be stored on the agreed upon data sharing platform.

In addition to the written report, a one-hour Monthly Status Report call will be coordinated by U.S. CADs PM. The City's PM will determine who will attend these monthly calls from City of San Diego. U.S. CADs PMs, Technical Lead, Training Lead, and Technical Support Lead will be in attendance. Additional members may be enlisted to attend monthly status report calls if needed.

The emphasis of the reports and meetings will be to measure project progress and performance. City of San Diego will report their level of satisfaction to ensure consistent high-level performance by the U.S. CAD team.

U.S. CAD's PM will maintain a project schedule for its tasks, budget, and milestones.

The City's PM and U.S. CADs PM will agree upon the final outline of the Monthly Status Report. Topics will include:

- Overall Project Progress
- Milestone Progress
- Issue/Defect Tracking Status
- Upcoming Activities
- Project Challenges
- Review of prior/outstanding items
- Performance Reporting
- Core Team Meeting updates
- Committee and/or subcommittee updates

During the project, it may be determined that committees and/or subcommittees will be required for the successful execution of this project. Updates from the Core Team, committee, and/or subcommittee meetings will be reflected in the Monthly Status Reports.

### **Deliverable Approval Process**

Deliverables will be submitted to the agreed upon data sharing platform for review by City of San Diego. City of San Diego will perform a comprehensive review of deliverables and notify the U.S. CAD PM of any corrections needed for final approval and acceptance.

Once the deliverable has been approved, City of San Diego will fill out the Deliverable Acceptance Agreement form in the same folder as the approved deliverable.

Deliverable Upload, Review, and approval process:

1. Submit Deliverable: U.S. CAD team Uploads deliverable to a Deliverables Review folder.
2. Review Deliverable: City of San Diego to review and provide comments.
3. Update Deliverable: U.S. CAD team to review City of San Diego comments and apply final updates.
4. Final Deliverable: U.S. CAD team uploads final deliverable along with Acceptance form to be completed by City of San Diego as confirmation of formal acceptance of the deliverable.

### **Change Management**

Making changes in project requirements is an essential task to any project management process. The U.S. CAD PM or the City's PM may be notified or identify a change in the project requirements. It is essential to know the reason behind the change, the impact of the change, and who is requesting the change. This information will be recorded in in the Decision log. This may include project delays and/ or scope changes.

### **Decision Log**

A Decision Log will be implemented as part of the Project Plan. The Decision Log document will be instrumental in our commitment to communication by tracking how a decision was reached, the options considered, and who approved the decision. the City's PM will develop and maintain a Decision Log and the document will be located on the agreed upon data sharing platform The intended audience of the Decision Log will include the Project Managers and may include additional members of the project team, including stakeholders.

### **Document Control**

The City will need to establish an on the agreed upon data sharing platform. To house all the documents created as part of the "San Diego Computer Aided Design Software" project. All associated project management documentation will be filed on the agreed upon data sharing platform.

### **Data Locations**

An agreed upon data sharing platform will be used for Project Management documentation. Project Management documentation will be stored in the Project Management folder in the respective subfolder. The City PM and the U.S. CAD PM are responsible for the contents and management of these folders and its contents. Folders can include:

- Contract Folder: Contractual data, attachments, any associated reference document, and Scope of Work will be stored within this folder and data will be managed by the City and the U.S. CAD PM.

- **Deliverables Folder:** All final and approved project deliverables identified within the Scope of Work will reside within this folder (see *Deliverable Approval Process* located in this *Document Control* Section)

As the project progresses, the folder structure, naming convention, and folder access permissions may evolve.

#### **Project Closeout -Closeout Presentation**

The closeout of the project finalizes and confirms all project activity across all phases have been completed to then transfer the project officially to the City PM and City of San Diego Teams. During this closeout phase, the City's PM and the U.S.CAD PM will confirm all deliverables were completed and accepted prior to the closeout presentation. All project data is also formally transferred to City of San Diego at this time. A final closeout presentation date will be set as an opportunity to present back to City of San Diego a summary of the entire project activity, from conception to completion, including lessons learned and best practices to be applied to future projects.

***c. Project Timeline: The Contractor must submit a project plan that meets the needs of the RFP and indicates a thorough understanding of the scope of work as outlined in this RFP. The Contractor must identify realistic person hours of effort and responsibilities for the deliverable and each work activity. Contractors must fully describe each of the key milestones and estimated completion dates. Include the following milestones:***

***Step 1: Project Kick-Off meeting and presentation of implementation plan.***

***Step 2: Project preparation and finalization of business requirements.***

***Step 3: Configuration, interfaces and Data Migration.***

***Step 4: Application Testing by Proposer.***

***Step 5: Customer Acceptance Testing.***

***Step 6: Training.***

***Step 7: Cut Over and Acceptance.***

***Step 8: Stabilization Period; and***

***Step 9: Post-Production Maintenance and Support.***

As part of the project plan, Milestones have been identified where major tasks or deliverables are to be accepted by the City of San Diego.

The summaries of the functional roles and responsibilities of the staff who will be working on this project can be found in Professional Services section 5.H. f. Staffing and Project Organization.

The milestone Steps provided have been identified throughout the Project and Training Plans to indicate points in the project delivery that are critical in the progress timeline.

The table on the following page outlines the key Phases, Tasks, with an approximate effort within this project plan.

A detailed breakdown of each Phase and Task can be found in Section 5.C. Training.

**San Diego Computer Aided Design Drafting Software**

<b>Milestone Step 1: Project Kick-Off meeting and presentation of implementation plan</b>	
Phase 1 - Data and Implementation Planning 1.1 Project Kick-Off and Preparation	1 Month
<b>Milestone Step 2: Project preparation and finalization of business requirements</b>	
Phase 1 - Data and Implementation Planning 1.2 Discovery Workshops: Civil and Survey 1.3 Success Planning Workshops: Civil and Survey 1.4 Success Planning Finalization: Civil and Survey 1.5 Discovery Workshops: Architectural and MEP 1.6 Success Planning Workshops: Architectural and MEP 1.7 Success Planning Finalization: Architectural and MEP	3 Months
<b>Milestone Step 3: Configuration, Interfaces, and Data Migration</b>	
Phase 2 - Configuration, Interfaces, and Data Migration 2.1 Civil and Survey Application Content and Interface Configuration Workshops 2.2 Civil and Survey Application Content Configuration 2.3 Architectural and MEP Application Content & Interface Configuration Workshops 2.4 Architectural and MEP Application Content Configuration 2.5 Data Migration 2.6 Administrator Training	5 Months
<b>Milestone Step 4: Application Testing by Proposer</b>	
<b>Milestone Step 5: Customized Acceptance Testing</b>	
Phase 3 - Workflow Development and Acceptance Testing 3.1 Civil Workflow Development & Acceptance 3.2 Survey Workflow Development & Acceptance 3.3 Architectural Workflow Development & Acceptance 3.4 MEP Workflow Development & Acceptance	5 Months
<b>Milestone Step 6: Training</b>	
Phase 4 - Training 4.1 AutoCAD Foundational Training (4-days) 4.2 Civil 3D Foundational Training (4-days) 4.3 Civil 3D Advanced Topics Training (2 days) 4.4 Civil 3D Fundamentals for Surveyors Training (3 Days) 4.5 Storm Water Training (2 Days) 4.6 AutoCAD Map 3D Training (2 Days) 4.7 Autodesk InfraWorks Essentials Training (2 Days) 4.8 Revit Fundamentals for Architecture Training (4 Days) 4.9 Revit Fundamentals for MEP Training (4 Days) 4.10 Revit Advanced Topics Training (3 Days) 4.11 Autodesk Data Management Solution Training (4 hrs)	8 months
<b>Milestone Step 7: Cut Over and Acceptance</b>	
Phase 5 - Cut Over and Acceptance 5.1 Cut Over and Acceptance	1 Month
<b>Milestone Step 8: Stabilization Period</b>	
Phase 5 - Cut Over and Acceptance 5.2 Stabilization Period	1 Month
<b>Milestone Step 9: On-Call Production Maintenance and Support</b>	
Phase 6 Post-Production Maintenance and Support 6.1 On-Call Support	3 years

***d. Project Delays: Proposer must also describe typical project delays when implementing a CADD solution and how project delays will be addressed should they occur. The process for submitting Change Requests, remedying project delays and proposed payment 'holdbacks' for missed milestones should also be detailed. All assurances that sufficient resources and knowledgeable experienced staff are available to meet any of the project schedule must be described.***

It is not uncommon to experience challenges and obstacles while working on projects, despite thorough planning and goal setting.

There can be a variety of reasons why timelines are not met, such as:

- Project Team Member Emergencies/Absences
- Software Configuration Issues
- Additional Scope Requested

U.S. CAD will work to limit the disruption a delay can cause. Additionally, it is our intention to ensure that the final delivery and handover dates are not extended. Any time a change to the original timeline and scope are presented, U.S. CAD will notify the City in writing to acknowledge the change and/or delay and present our plan to remediate the specific change and/or delay.

When Project Team Members have an unexpected absence from normal working hours, U.S. CAD will call on a "backup" project team member who has been onboarded to this project and who is already involved in the project in some capacity. Simultaneously, U.S. CAD will begin the onboarding process for an additional "backup" project team member. Upon return of the absent Project Team Member, U.S. CAD will assess the timing and project activity and re-insert the Project Team Member at the appropriate time.

In the event a software configuration issue arises that will cause a delay in our progress, U.S. CAD continue project progress in areas that aren't dependent upon the configuration to move forward. While specific timelines may be adjusted to prevent re-work or to respect dependencies, our goal is to progress ahead and not allow a single delay to hold up the overall progress of the project.

When additional scope is requested, U.S. CAD will assess the scope requirements and estimate a timeline and cost. Upon acceptance and approval of our time and cost estimates, U.S. CAD will integrate the additional requirements and timeline into the original timeline and scope. Changes to the original timeline and scope are in draft form until a signed approval is received by U.S. CAD.

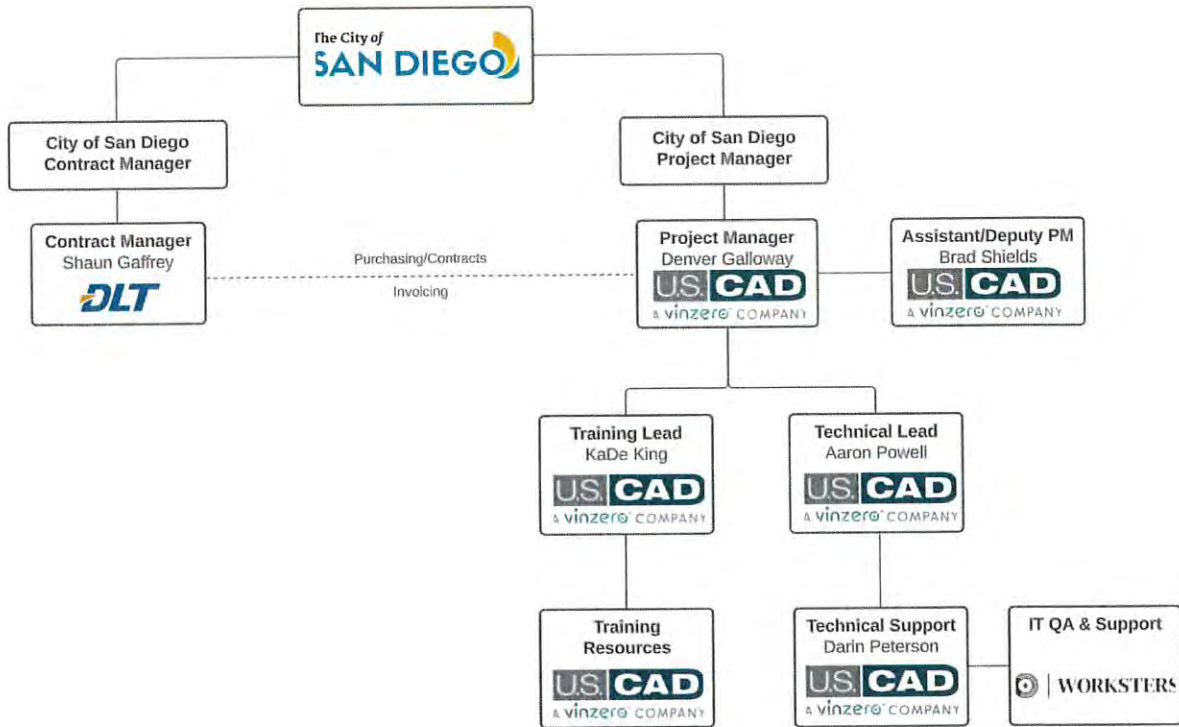
***e. Scope Management: Proposer must describe the change control process for scope management. This should include the initiation of any scope changes and subsequent approvals.***

The change control process for scope management on this project will be the responsibility of the Team's Project Manager. If any activity requested for the project does not align with the approved project Scope of Work and the contract, the U.S. CAD PM will determine if a change order is necessary and will communicate that to the City's PM through a Request for Change Order (RCO) for review and approval. At a minimum, the RCO will have a unique identifier (numbering system), state the project name, contract number, date of request, description of change(s) needed, reason for change, all supporting documentation, impact of change to the overall project timeline, and associated cost. The RCO shall be signed by individuals having authority to sign contractual agreements before any out of scope work proceeds.

***f. Staffing and Project Organization: The Contractors organization chart must be included with all proposed personnel, including the supervisor level, functional responsibilities, key personnel, and other staff members who will be involved in the project and percentage of time dedicated to project. Contractor will need to provide resumes of staff to include minimum experience and an executive summary of the primary position. Contractor should describe their commitment to ensuring the composition of the project team will remain consistent throughout the course of the implementation phase. Project team cannot be substituted, or staff added without prior notice and acceptance by the City. Prime Contractor may use subcontractors; however, the Prime Contractor must be the Proposer. All subcontractors must be listed in the Contractor Standards Pledge of Compliance form. If Contractor wishes to bring in a subcontractor for performance under the agreement, the City must approve the subcontractor in writing. The Contractor must also identify key resources located in the San Diego area.***

DLT, as the prime contractor, has subcontracted U.S.CAD (for professional services), Autodesk (for software) and Worksters, an SLBE (for 3<sup>rd</sup> party IT quality assurance and IT support services) for the delivery of the solution.

DLT, along with the team member firms, is committed to ensuring the composition of the project team will remain consistent throughout the course of the implementation phase. Project personnel were carefully selected based on their skillsets and availability for successful delivery of this project. Staff will not be substituted or added without prior City notification and approval.



The following are summaries of the functional roles and responsibilities of the staff who will be working on this project. Those individuals who are in the San Diego area are identified below:

**Project Manager - Denver Galloway** - The Project Manager is the main POC between the City’s Project Manager and the Delivery Team and will oversee the day to day implementation of the scope of work per the contract. He will be in charge of cost tracking and control, assignment of Team resources, project recordkeeping and reporting, and managing the project so that schedules and expectations are adhered to for the duration of the contract.

Executive Summary of the Primary Position- Project Manager

With over two decades of industry experience, Denver brings ample experience to the project delivery team, specifically with knowledge of the Autodesk software implementations within the civil and government industry and in working with Autodesk to execute successful implementations of AEC solutions. Denver’s role within U.S. CAD as the National Professional Services Director for Infrastructure and Government gives him direct access to a bench of capable resources who have extensive product knowledge and work regularly with private and public sector customers to enable users to take advantage of the power and efficiency of the Autodesk portfolio of products. Denver’s access to resources includes a dedicated project management team which provides him with assistance in ensuring that the details of complex implementations do not fall through the cracks.

In recent years, Denver has worked directly with large government customers to successfully implement Autodesk solutions and aid them in a successful migration from their legacy Bentley solutions. His ability to work directly with the customer to listen, understand, and communicate effectively are reflected in the strong references provided within this proposal. Mr. Galloway’s ability to provide ongoing updates, reporting, and coordination to projects of similar size and magnitude through his direct collaboration and effective use of his extended team is paramount. This, combined with his intimate knowledge of Autodesk products and his civil industry experience make him the ideal Project Manager for the City’s effort to install an effective and sustainable CADD solution.



**Deputy Project Manager – Brad Shields –** The Deputy Project Manager is responsible for assisting the Project Manager on daily operations, including tracking hours and budget, as well as the scheduling of resources needed to deliver services throughout the contract. He will also assist with financial oversight, resource management, proactive problem identification and resolution, and operational improvements.

**Contract Manager – Shaun Gaffrey –** The Contract Manager will be the point of contact for contract implementation, will submit invoices on behalf of the Team and will work with team member firms to ensure that work is performed in accordance with the contract.

**Technical Lead – Aaron Powell -** The Technical Lead provides guidance in product implementation and technical application of solutions. He will work closely with Autodesk's software development team members to ensure that the product is functioning correctly within the City's organization.

**Training Lead – KaDe King –** The Training Lead is responsible for the training and implementation services included in the proposal.

**Technical Support Lead – Darin Peterson –** The Technical Support Lead will oversee a team of individuals that provide daily technical support for Autodesk products for the City, including a web-based dashboard system that will provide the City with real-time visibility into support issues to ensure timely responses. The Technical Support Lead will work with the IT QA and Support Consultant for review of IT-related efforts, deployment, and environmental testing, and can call upon them as needed for on-site technical assistance.

**IT QA & Support -** Worksters will provide 3<sup>rd</sup> party quality assurance and ad-hoc IT support for the delivery team. They will work closely with the Technical Lead to ensure that deployment packages of software adhere to the City's requirements, perform testing of installation packages, and review documentation related to administration of City-specific Autodesk software applications. Worksters is headquartered in San Diego.

Other individuals who are not shown on the Organization Chart as being dedicated to the project but who will be available to provide support and interface with the City as needed include:

- **Executive Sponsor (U.S.CAD) - Chris Keck, PE , Executive Vice President–** As a part of U.S. CAD's Executive Team he is responsible for the ensuring the commitment of U.S. CAD's services to the City. *Chris is located in southern CA.*
- **Implementation Quality Assurance Lead (U.S. CAD) –** Melanie Zubok will be involved throughout the duration of the project to ensure commitment from Autodesk to the City as it relates to software quality. *Melanie is located in southern CA.*

The percentage of time the key staff will be dedicated to the project is shown on the table below. Please note that this percentage is estimated over the life of the 5-year base contract.

<b>Position</b>	<b>Name</b>	<b>% on Project</b>
Project Manager	Denver Galloway	20
Assistant/Deputy Project Manager	Brad Shields	<40
Contract Manager	Shaun Gaffrey	<5
Training Lead	KaDe King	10

<i>Position</i>	<i>Name</i>	<i>% on Project</i>
Technical Lead	Aaron Powell	20
Technical Support	Darin Peterson	10

Resumes for the individuals shown on the Organization Chart are included in Appendix C.

Autodesk SMEs in Infrastructure and Building will provide support to DLT and U.S. CAD on an ad hoc basis should the need arise.

***g. Migration Strategy: Contractor must describe the migration strategy for this project based on the Bentley Systems database of approximately 10TB. (How would the Proposer determine the best process for moving all past/historical data into the new CADD Software solution?) Detail your methodology for testing/QA and ensuring risk of business disruption is properly mitigated. This migration strategy must be reflected in the migration costs for this proposal. Proposers must describe their experience with migrating these specific database /data types and describe what difficulties may be encountered during migration due to these data types.***

U.S. CAD will work with the City to determine the need to migrate the entire database and the priority of this effort based upon options available with Autodesk interoperability with native Bentley Systems software.

Over the numerous conversions U.S. CAD has completed, we've developed a scalable process to accommodate conversion of DGN files and resources to native DWG file formats.

To begin, a complete copy of the database is generated. This copy can be updated as needed throughout the conversion process to maintain data integrity. U.S. CAD will work with the City to implement a back-up schedule and at minimum backups will be created prior to any DGN conversions. Next, U.S. CAD will work with the City to identify archived projects that haven't been modified in the past three (3) years. We will focus on this subset of files for the first batch of conversions.

Based upon the subset size and complexity, U.S. CAD will implement a quality assurance process to ensure the accuracy of each batch of conversions prior to moving on to subsequent conversions. Following this process, all archived projects should be converted and checked for quality prior to conversion of any active project files.

As training concludes and the transition to Autodesk as the full-time design suite is completing, users may need to convert DGN designs for cross-over project work or new projects that require the use of older designs. This conversion process will be included in training sessions for all users.

U.S. CAD recommends that the City maintain the final back-up of the DGN database for up to five (5) years at minimum.

***h. Final Application Testing & Acceptance: Please outline and describe the acceptance testing process that will confirm system operations and ensure that the system meets all functional requirements as outlined in this RFP.***

U.S. CAD will deliver and install the components of the solution on a City of San Diego test environment for user acceptance testing. U.S. CAD, in partnership with Worksters, will coordinate with the City's I.T. resources to identify requirements for installation and testing. U.S. CAD will collaborate with Worksters to provide quality assurance of the final proposed solution prior to submission to the City.

This will be accomplished as follows:

- The City will provide a dedicated User Acceptance Testing (UAT) Team.
- U.S. CAD will provide a System Test Plan to facilitate UAT.
- The City UAT team will then develop a UAT Plan with Worksters and provide it to U.S. CAD for review. U.S. CAD will review City of San Diego's UAT Plan and provide comments back to City of San Diego. City of San Diego will provide a final version of the UAT Plan to U.S. CAD.
- In addition to U.S. CAD's testing materials, U.S. CAD will use City of San Diego's UAT materials to test the software at U.S. CAD's offices. The following needs to be completed by City of San Diego prior to U.S. CAD delivering the software solution to City of San Diego for UAT:
  - City of San Diego's UAT Plan – reviewed by U.S. CAD and Worksters.
  - City of San Diego identification of a UAT Lead
  - City of San Diego identification of a UAT team
  - City of San Diego training UAT team on the requirements and the UAT plan
  - City of San Diego preparation of the City test environment
  - City of San Diego purchases and configures test management software.
- U.S. CAD's Software Lead will provide City of San Diego the Infrastructure Plan document that will help City of San Diego document City of San Diego's Testing and Staging environment hardware and software requirements and any interoperability and management requirements for these environments. For each environment, the Infrastructure Plan will contain details regarding:
  - Requirements of the environment to be connected to a network domain for testing or other purposes.
  - Required network protocols.
  - Which tools will be shared between the environments, and how the sharing will occur.
  - The type of support that each environment will require.
- Upon Successful completion of U.S. CAD's system testing, U.S. CAD will install the AEC Collections on the City's designated test environment (limited to one test environment) and have Worksters validate that it is functioning. The City's technical experts will support the installation and prepare the infrastructure and system interfaces.
- During the delivery and installation of the content to the City test environment, U.S. CAD will train the City's user acceptance testing (UAT) team on the software deliverables. This includes up to three (3) days on-site (if possible) supervised demonstration training class for the software deliverables for City of San Diego UAT testing people. The demonstrations will provide the necessary guidance for City of San Diego test team to perform UAT.
- Once the City UAT team has been trained on the software components, the City UAT team will be responsible for completing the UAT process. U.S. CAD will provide up to six (6) days on-site (if possible) supporting the UAT team for the software deliverables and following these on-site days, will provide remote on-call assistance during the UAT process and will fix defects found by City of San Diego during the UAT process. U.S. CAD's on-site time can be used to:
  - Assist in diagnosing Defects in the AEC Collection solutions.

- Assist in adjusting the AEC Collection Software and Configuration.
  - Provide technical support (knowledge transfer) on how to perform testing.
- After the delivery of the AEC Collections solution to the City test environment, City of San Diego will have twenty (20) Business Days to perform UAT for the software deliverables. The City's UAT process must validate that U.S. CADs AEC Collection software meets the defined requirements and that the users can perform their tasks. Defects found during the UAT process will be fixed by the appropriate party and redelivered. This cycle will continue until the configured AEC Collection solution is ready for go-live deployment based on the acceptance criteria described below.
- City of San Diego is responsible for documenting Defects in an agreed upon fashion such that the Defect can be reproduced and fixed by U.S. CAD. City of San Diego will document all Defects in an agreed upon Defect tracking system and communicate these Defects to U.S. CAD who will assign a severity level and status update for the defect. U.S. CAD and City of San Diego will hold twice weekly telephone calls to discuss issues and defects discovered during the testing process.
- The cycle of City of San Diego testing the delivery and U.S. CAD fixing Defects will continue until the acceptance criteria below are met.

**Deliverables:**

- Updated Infrastructure Plan
- City of San Diego UAT Team Accepted AEC Collection Software
- Artifacts and Workshops
- System Test Plan examples
- City of San Diego User Acceptance Testing (UAT) Plan
- Up to 3-days of UAT Team Training and Education
- Up to 6-days of UAT Team Support
- Infrastructure Plan Review

**Assumptions:**

- The City is responsible for staffing, preparing for (creating UAT scripts, plans and data) and conducting user acceptance testing (UAT).
- The City's test lead should be an experienced software tester and the test lead should ensure the City testing team understands how to test the software.
- The City will provide U.S. CAD the test data set prior to the release of each task.
- The City test team will complete UAT within a mutually agreed upon timeframe for each task after deployment to the test environment.
- Testing will be done on an approved testing environment.
- The City should provide their UAT plan to U.S. CAD's Software Lead for review and approval prior to U.S. CAD delivering U.S. CAD Collection software for acceptance.
- The City's UAT process is conducted by all parties (business, user, and IT staff) at the same time. For example, the IT group does not have a UAT process that happens first and is separate from business/user UAT process.
- Defect response and resolution times should be mutually agreed upon and fit U.S. CAD's and City of San Diego staffing levels.

- At least two (2) business days should be allowed for U.S. CAD to investigate a Defect before it is verified as reproducible after all data has been provided by the city.
- The City should ensure U.S. CAD's personnel have sufficient administration privileges to install and support testing activities in the City test environment.
- The City shall report all faults discovered in the configured software to U.S. CAD within two (2) business days of discovery.
- U.S. CAD is not responsible for fixing Defects related to:
  - (a) operation of the computer on which software is installed in environmental conditions outside those prescribed by the computer manufacturer.
  - (b) operation of the software with a version of the operating system software other than that specified by U.S. CAD.
  - (c) failure to maintain the computer on which software is installed or used in accordance with standards prescribed by the computer manufacturer.
  - (d) failure to ensure that City personnel and staff are fully trained in the use and operation of software.
  - (e) software serviced, maintained, or modified by anyone other than U.S. CAD or a U.S. CAD authorized person.
  - (f) City computer hardware failing to meet the minimum specification prescribed by U.S. CAD for use with the software)
  - (g) bad data that causes the appearance of software Defects
- The City's personnel should:
  - Have a thorough knowledge of requirements.
  - Know how to use the City's Defect logging system.
  - Know how to log Defects such that they are clear and reproducible.
  - Ensure not to log multiple Defects in a single entry.
  - Include all related information (log files, data, etc.) when logging a Defect.
- City of San Diego Responsibilities
  - Manage the completion, testing, installation, and Successful operation of non-U.S. CAD components.
  - Ensure U.S. CAD's personnel have sufficient administration privileges to install and support testing activities in the City test environment.
  - Assign an experienced software test lead and dedicated test team with appropriate skill set to manage the test planning and testing process. Purchase and/or configure test management tool for this project. Perform UAT consistently over the agreed upon testing period.
  - Ensure the appropriate environment and data are set up for UAT testing. To include purchase, assembly, and installation of necessary hardware and software meeting the minimum system requirements for the AEC Collection.
  - Prepare Test Plan, identify testing personnel, and ensure testing personnel understand how to test the software.
  - Report all faults discovered in the customized software to U.S. CAD within two (2) Business Days of discovery.
  - Research and fix data issues.
  - Provide staff or remote access to U.S. CAD to allow installation of patches to the test.

***i. Transition Plan: Please outline and describe the proposed transition plan that ensures proposed solution has been validated and tested and have obtained the City's final acceptance that the Proposer is prepared to deliver all services to the requirements described in the Agreement.***

U.S. CAD will leverage its experience with multiple agencies and our Implementation Framework within the following proposed 5 Phases:

- Phase 1- Project Kick-Off, Preparation, and Finalization of Business Requirements
- Phase 2 – Configuration, Interfaces, and Data Migration
- Phase 3 - Workflow Development and Acceptance Testing
- Phase 4 - Software Training
- Phase 5 - Cut Over and Acceptance
- Phase 6 - Post-Production Maintenance and Support

Phase 1 of our Transition Plan allows for Discovery and Success Planning efforts designed to allow U.S. CAD technical experts to learn as much as possible about the City departments and existing workflows. We'll continue to build on this knowledge throughout the life of the project, but the efforts in phase 1 will allow U.S. CAD and the City to collaborate on the best plan moving forward.

In Phase 2, U.S. CAD will begin to adapt the Autodesk applications within the AEC collection to the needs and requirements of the City. U.S. CAD will build templates and styles/families that align with the City standards. This phase includes customization of the interface and setup of appropriate workspaces. This phase is designed to be collaborative as well, and the City will work closely with U.S. CAD to ensure the content built is necessary and that we're able to build the content needed by the City to produce designs and plans.

After completing application development, U.S. CAD and the City will engage in Phase 3 where we'll work together to map out existing Bentley workflows. U.S. CAD technical experts will utilize these existing workflows to create and document the appropriate Autodesk workflows. U.S. CAD will provide training on these workflows and allow for a testing period by the City. Based upon feedback from the testing period, U.S. CAD will finalize workflows and begin integrating them into the Training Plan.

In Phase 4, U.S. CAD will begin software training with AutoCAD software for all users. From there, users will split into their respective disciplines to further their AEC Collection software knowledge. After completing fundamental training, users can enroll in advanced topic training that aligns with the workflows developed in Phase 3. Specific training is offered in this phase for storm water design, Autodesk InfraWorks software for planning and pre-engineering efforts, and Map 3D software for GIS access for Utilities.

After training is complete, all City of San Diego users should be trained on Autodesk software, and the recommended workflows for the City. Based on our experience, there will be comments and suggestions from the broader group to change or improve processes or workflows. In Phase 5, U.S. CAD and the City will undergo the Cut Over process and can adjust those processes and workflows for acceptance by the City.

Upon official acceptance and Cut Over, U.S. CAD will continue to service the City in a supporting role for

the next three (3) years. During this time, U.S. CAD will provide guidance to the City based upon updates to the AEC Collection software and new workflows and technology available from Autodesk and their partners.

***k. Levels of Support: Please describe in detail the levels of support provided for this solution and how they align with the City's requirements. In this description, please include the terms of the support and the services provided. The support level pricing must be reflected in the cost proposal. If there are saving opportunities, please provide additional options as available.***

What follows is the level of support provided for this solution and alignment with the City's requirements. US CAD Team understands the need for the City to provide timely and comprehensive Maintenance and Support capabilities for its end-users.

U.S. CAD will make live support available to all City users Monday through Friday beginning at 6:00 am PST each day and ending at 6:00 pm PST each day, excluding Federal Holidays. Technical support requests received outside of those hours will be addressed on the next business day. U.S. CAD will provide a job aide to all City users that will clearly describe the support options.

- U.S. CAD utilizes a ticketing system (support ticket system) which is a help desk software that collects and tracks all customer support interactions from various channels—phone, email, website, and personalized user portal. No matter how a customer chooses to reach the U.S. CAD support team, that interaction will be logged in to the system.
- This system is an omnichannel ticketing system that makes it easy for U.S. CAD to track, prioritize, and solve end user support tickets. It allows both the support agent and the end user the ability to access and manage all information from one centralized hub, giving all parties a full view of a ticket's status, regardless of where it originated.
- U.S. CAD support agents have full details about every user they interact with through an organized workflow. This information can include (but not limited to) email address, phone number, physical address, time zone, department, title etc. Equipped with context about every user, support agents can quickly resolve individual support requests and provide quality customer experience across the board.
- Incoming tickets are assigned a unique reference number and status to help the U.S. CAD support team manage and prioritize their workflow. To stay on track, the system administrator has set up alerts for tickets that agents have not responded to in a timely manner. This helps in identifying problems early, so administrators can act swiftly to ensure customer satisfaction is not interrupted.

#### **Level of Support - Requesting Technical Support**

Technical support can be requested from U.S. CAD in multiple ways.

- 1.) Visiting [USCAD.COM](https://www.uscad.com) -> SUPPORT -> CREATE A TICKET
- 2.) Calling the toll-free number at (877) 648-7223
- 3.) Sending an email outlining the issue to [support@uscad.com](mailto:support@uscad.com)
- 4.) Logging in to the City of San Diego personalized customer portal.

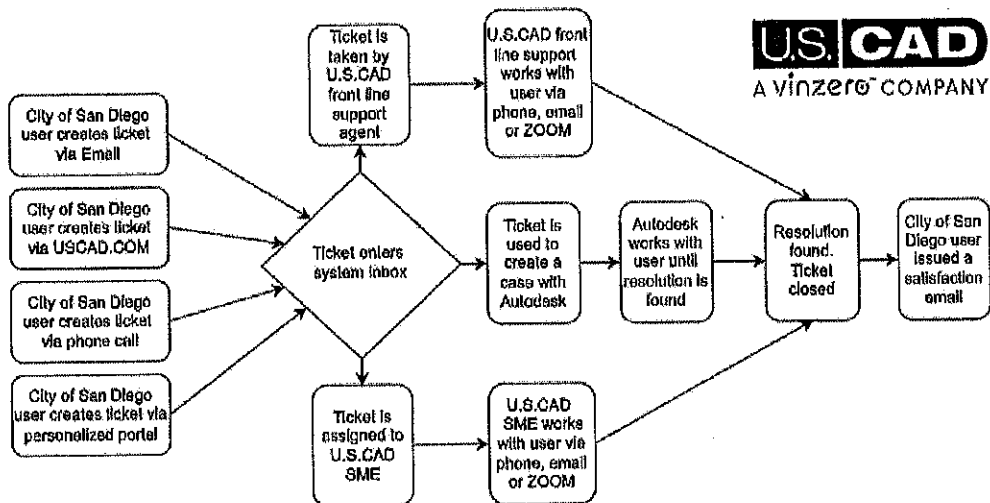
Once the ticket is created via one of the methods above, a front-line technical support agent will assess the support issue presented and:

- Take the ticket themselves and work with the user until the issue has been resolved.
- Assign it to the appropriate U.S. CAD SME for them to work with the user until the issue has been resolved.
- If determined that the issue is beyond the ability of the U.S. CAD support agent to solve, the agent will escalate the ticket to the Autodesk support team by creating a case on behalf of the City of San Diego user. U.S. CAD support agents will monitor the case with Autodesk to ensure the user receives the desired resolution to the issue. This information will be added and tracked in the U.S. CAD support ticket system.

**Support Services – Technical Support Ticketing System**

As a part of the purchase of Autodesk AEC Collection software, both Autodesk and U.S. CAD provide a base level of software technical support. This includes web-based support, telephone support, and access to a ticket tracking system. This base-level technical support is included at no additional cost to City of San Diego.

Below is a general outline of a technical support ticket lifecycle:



Ticketing System - Interactive Dashboard.



U.S. CAD also uses the data housed in the support ticket system to provide City of San Diego with a real time, interactive dashboard. This dashboard helps both U.S. CAD and City of San Diego identify the most critical reasons users are getting in contact with the technical support team. And with that, helps build a roadmap of potential improvements from both an operations and product perspective. Included on this dashboard are details on the number of tickets open and solved, tickets created by time period, ticket response time, time to close, tickets by product, ticket detail and user satisfaction results just to name a few. The U.S. CAD team will work with City administrators to customize this dashboard to show specific information as requested.

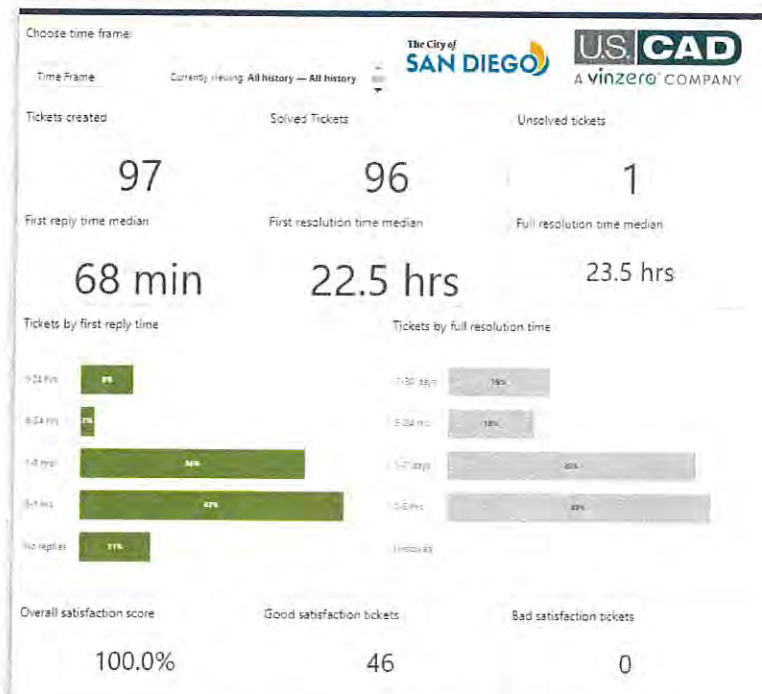
A sample dashboard is shown here:

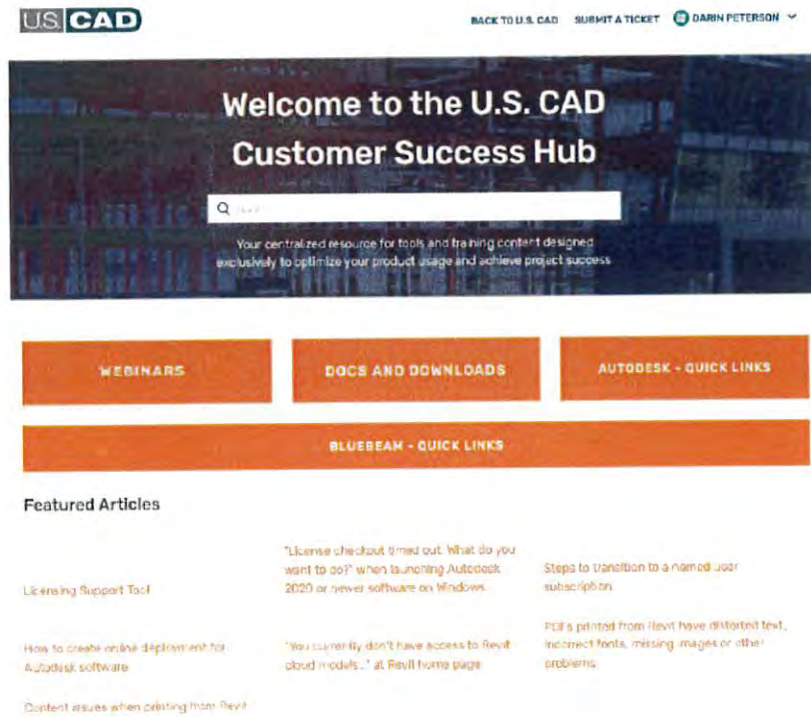
#### Ticketing System - Personalized knowledgebase portal.

Another useful feature that integrates seamlessly with this support ticketing system is a personalized knowledgebase platform that allows City of San Diego users to search for answers to frequently asked questions, view their previously submitted tickets and the resolutions to those tickets, and access City of San Diego specific support information that may be currently difficult to locate. This platform provides City users a self-service credentialed portal where answers to questions can be quickly located without the need to submit a support ticket thus reducing the downtime common technical problems currently cause.

If a resolution to the issue cannot be found, the user can submit a ticket directly to U.S. CAD front line technical support agents via this portal. The lifecycle of this ticket can also be tracked via this portal.

A sample landing page for this portal is shown here:





**Ticketing System – Support Service Targets**

The U.S. CAD support ticket system allows for the definition of various support service targets. Providing support based on these service targets will ensure that City will receive a measured and predictable technical support service.

After adding these support service targets into the U.S. CAD support ticket system, technical support agents and U.S. CAD administrators will closely monitor the service target performance to help meet the service target goals. The support ticket system highlights tickets that fail to meet service level targets so that technical support agents can promptly identify and address possible problems.

The City will receive a personalized interactive dashboard which enables City of San Diego to easily view how well the U.S. CAD technical support team is meeting these support service target policies. This dashboard breaks down the City’s support service metrics by policy, time, and status, so problem areas can be identified.

**Example U.S. CAD Support Service Targets**

Service Target	Definition	Target Response Time	Target Resolution Time
1 Critical	No workaround, application unavailable. Affects 25 or more users; impacts to revenue, safety, and/or legal liability.	90% within 30 minutes. (During business hours)	Within 2 hours (Longer if manufacturer assistance is needed to resolve issue)
2 High	Workaround available, resolution required.	90% within 60 minutes. (During business hours)	Within 3 hours (Longer if

Service Target	Definition	Target Response Time	Target Resolution Time	
			manufacturer assistance is needed to resolve issue)	
3	Moderate	Application down and less than 25 users are impacted	90% within 120 minutes. (During business hours)	Within 4 hours (Longer if manufacturer assistance is needed to resolve issue)
4	Low	Moderate impact to application functionality, user(s) is unable to process a specific job function	90% within 120 minutes. (During business hours)	Within 4 hours (Longer if manufacturer assistance is needed to resolve issue)

*Note: Target Response and Resolution Times are estimates. U.S. CAD makes no guarantee regarding resolution time.*

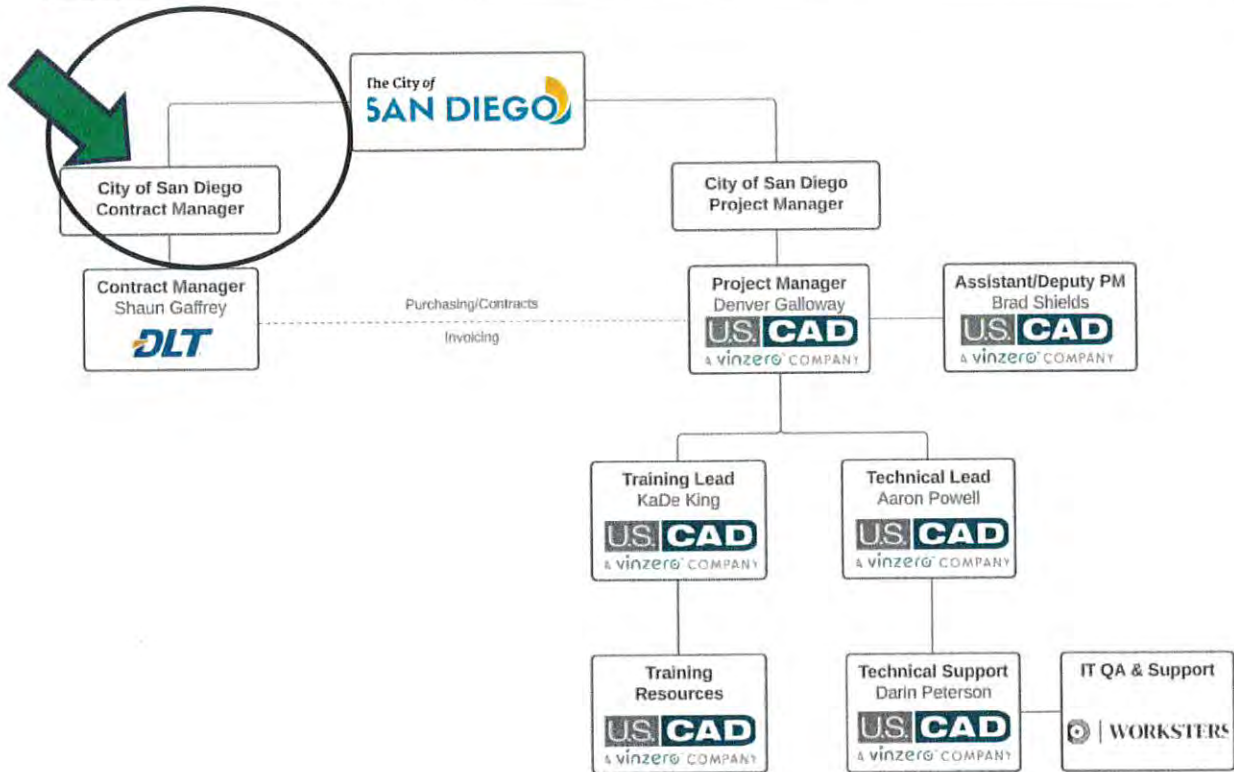
**Level of Support - Customization of the Autodesk authoring tools**

The Autodesk authoring tools provide a wide range of customization platforms. Technical support on all these platforms will not be assumed and prior agreement is required on what platforms will be supported by U.S. CAD.

**I. Contract Administrator**

*The Department Representative for this Contract is identified in the notice of award and is responsible for overseeing and monitoring this Contract.*

The Team acknowledges. The City Contract Manager is shown in the Organizational Chart below:



**J. Functional Requirements Response Template (Exhibit E)**

*The City has provided potential technical requirements for the proposed solution as shown in the Functional Requirements matrix. Proposers are required to indicate whether their solution meets City requirements, to what extent it meets City requirements, and to what extent modifications or customizations are required.*

*All requirements identified with a “Fully Compliant” response shall be assumed to be available in an ‘Out-of-the-Box’ format at the time of RFP submittal (i.e., beyond release candidate and beta testing). Proposer must describe how the proposed solution is fully compliant in the “Comments” section. All requirements identified with a “Partially Compliant” response shall require further explanation from the Proposer in the “Comments” section. If there are costs associated with making the requirement fully compliant, please provide the associated details and costs. If the Proposer fails to provide an accompanying elaboration for the “Partially Compliant” status, the City shall consider the requirement to be “Not Compliant”. All requirements identified with a “Not Compliant” response shall be assumed to mean that the Proposer cannot or will not be able to meet this requirement without further customization or development of their product. All requirements identified with a “N/A” response shall also require further explanation from the Proposer in the “Comments” section.*

Exhibit E is provided under Tab B as required and will be uploaded separately to the PlanetBids site as required at the time of submittal.

## **Tab B- Executive Summary and Response to Specifications**

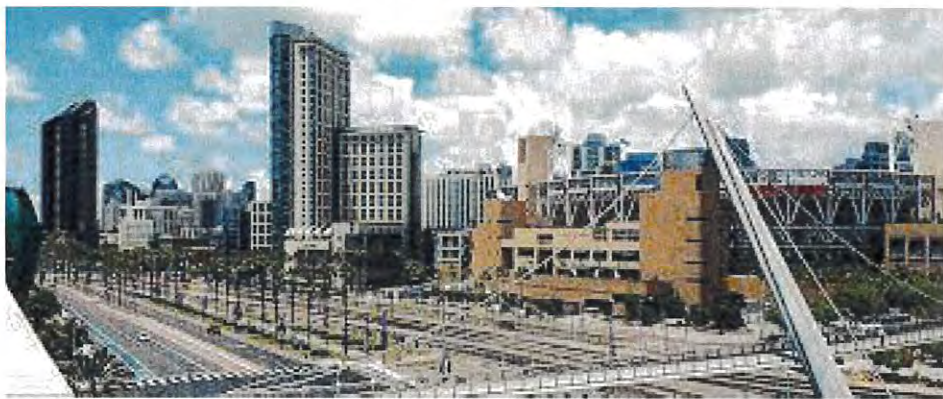
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The Executive Summary and response to requirements for Tab B are provided on the following pages.

## Title Page

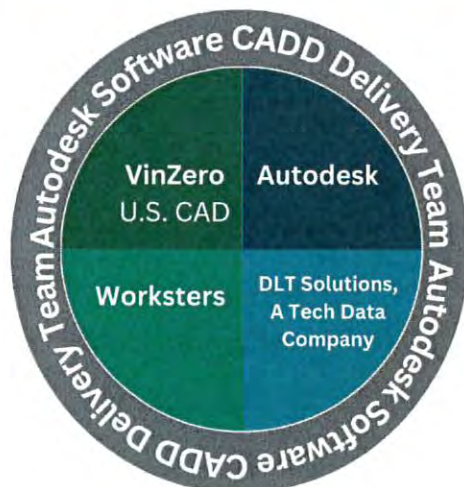
# RFP Response to the City of San Diego for Computer Aided Design Drafting Software

**Solicitation # 10089997-23-C**



**Submittal Date: May 5, 2023**

**PRESENTED BY THE AUTODESK SOFTWARE CADD DELIVERY TEAM**



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## Executive Summary

The Autodesk Software CADD Delivery Team (the Team) is comprised of three major firms specializing in providing software solutions to government clients: DLT, as the prime contractor, Autodesk, U.S. CAD and Worksters, as subcontractors. Together, this team brings more than 25 years of experience in the successful implementation of Autodesk software on projects similar in scope and complexity to the City of San Diego (the City). We believe our Team is best qualified to provide the services of the RFP because we offer a superior software solution and a proven service organization built around client satisfaction. We have had active and ongoing involvement with the City over the past 5-years, which has informed the Team's deep understanding of the particulars of your goals and objectives.

The Team's prime contractor, DLT, specializes in facilitating government contracting on IT and engineering projects and has been working with Autodesk and U.S. CAD for more than 22 years on over 10,000 procurement interactions. DLT's experience in processing contracts allows Autodesk and U.S. CAD to do what they do best: provide excellent services and software solutions.

The Team's software provider, Autodesk, will provide the Autodesk AEC Industry Collection software- a collection of integrated tools that include 29 individual products that are intended to work together. Beyond the AEC Collection software, Autodesk will also be providing solutions from the Autodesk Construction Cloud, which includes Autodesk Build and BIM Collaborate Pro. Additionally the Autodesk Premium Subscription Benefits are included. This will provide the City with a mature, complete solution that fulfills the City's needs in a cost-effective manner and access to subject matter experts (SMEs), and the industry leaders in digital delivery solutions. A complete list of products to be provided on this project are documented in Appendix B of this document.

The Team's professional services provider, U.S. CAD, brings a history of active and ongoing involvement with government agencies and Autodesk over the past 5-years. They offer a team of SMEs that civil engineering firms across the US seek out when it comes to migrating from Bentley software to Autodesk solutions. Their professionals have worked closely with Autodesk to provide similar services to Federal, State, and Local agencies like the City, Caltrans, and the FAA. They also have a San Diego presence, with both the corporate sponsor, Mr. Chris Keck, P.E., Executive Vice President, and the Account Manager, Ms. Melanie Zubok, both located in the area. Mr. Keck is a licensed civil engineer and will focus the company's energy and effort into continued alignment, communication, and accountability. He has been working in the civil industry for 20 years and has experience in the public and private sector, having participated in the Autodesk rollout at Caltrans, as well as other agencies. Ms. Zubok has worked with the City for the past 5 years on projects involving Autodesk products.

Over the past 6 years U.S. CAD has delivered a wide variety of services to the City's Engineering and Capital Projects (EAP) group starting with AutoCAD workflow documentation and training on Autodesk Revit and Civil 3D products. Once the pilot project training was completed, U.S. CAD worked with the City to develop standards, templates and families for the Autodesk software. In 2022 U.S. CAD began working with the City's Public Utilities group, delivering ongoing assistance for Autodesk licensing, software support, technical support, and training.

This Team will be focused on delivering the solution through a Phased approach that is further defined within the sections of this RFP response. This approach will set the City up for a successful rollout across the organization.

## **Response to the RFP**

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Responses to the requirements for Tab B per RFP Section 2.13 are provided on the following pages.

## Exhibit E- Functional Requirements

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The Functional Requirements, Exhibit E, is included herein as required and has been uploaded to PlanetBids separately as also required.



NEW FINAL - Exhibit  
E FRs (Addendum D)

## Exhibit F- Interrogatories

The Interrogatories, Exhibit F, is included herein as required and has been uploaded to PlanetBids separately as also required.



Exhibit F  
Interrogatories ADS

The PDFs that are required as part of Exhibit F are included below.

### PDF for Exhibit F, line 2.01- Project Plan for Milestone Based Delivery



Exhibit F - 2.01.pdf

### PDF for Exhibit F, line 2.02- Plan for Implementing Proposed Solution



Exhibit F - 2.02.pdf

### PDF for Exhibit F, line 2.03- Plan for Implementing Solution for Two Common Processes within a City Dept.



Exhibit F - 2.03.pdf

### PDF for Exhibit F, line 2.04- Plan for Providing Training in O&M of the Solution



Exhibit F - 2.04.pdf

## Exhibit G- IT Mandatory Requirements

---

The IT Mandatory Requirements, Exhibit G, is included herein for responsiveness and has been uploaded to PlanetBids separately as required.



FINAL - Exhibit G IT  
Mandatories.xlsx

## Redacted Proposal

---

There is no redacted proposal.

## Tab C: Cost/Pricing Proposal- Exhibit D

---

The pricing proposal, Exhibit D, is included herein for responsiveness and has been uploaded to PlanetBids separately as required.



Exhibit D- Pricing  
Proposal.xlsx



Exhibit D - Services  
Pricing Methodolog

Please note that on the Exhibit, we have inserted "\$0"s in some fields in order to maintain the integrity of the form, when in fact these items are Not Applicable to this project.

## Appendix A: Course Outlines

---

The following course outlines have been provided as samples for the City's review. The Team anticipates that more specific content and course breakdowns will be developed as a part of U.S. CAD's Implementation process. The course outlines below capture the essence of topics covered during user training sessions and should provide the City an understanding of the main topics addressed. Additional topics will be uncovered and further refined during the implementation process and approved by the City during the development of the training plan.



C3D\_BEYONDBASIC  
S.pdf



ACAD\_ESSENTIALS.  
pdf



C3D\_ESSENTIALS.pd  
f



## Appendix B: Autodesk Products to be Provided

### AEC Collections

The architecture, engineering, and construction (AEC) Collection provides designers, engineers, owners and contractors a set of BIM and desktop CAD tools supported by a cloud-based common data environment that facilitates project delivery from early-stage design through to construction.

- **Improve operational efficiency** Automate tasks to reduce design time and improve handoff with streamlined data exchange.
- **Deliver more sustainable projects** Deliver high-quality infrastructure projects that exceed performance requirements.
- **Reduce risk** Increase stakeholder buy-in and project predictability, while reducing errors and rework.

### BIM Collaborate & Collaborate Pro

BIM Collaborate is a comprehensive design collaboration and model coordination solution enabling project teams to align and execute on design intent and constructability. Key capabilities such as model review and markups, issue management, change analysis, and clash detection ensure the highest quality designs make it to the field, reducing rework, improving productivity, and accelerating project delivery.

- Centrally manage your data in a unified platform
- Share feedback, view insights, and detect clashes on any device
- Understand the latest changes to the project model in a combined view
- Manage design data exchange with defined swim lanes
- Deliver high quality models with automated clash detection
- Create and track issues to manage change requests
- Automatically publish updates as per project requirements

With BIM Collaborate Pro, take advantage of cloud-based design collaboration that enables teams to co-author in Revit, Civil 3D, or Plant 3D.

- **Revit Cloud Worksharing** Move work-sharing to the cloud for faster, smoother Revit co-authoring. Use BIM (Building Information Modeling) data to improve downstream constructability.
- **Collaboration for Civil 3D** Securely collaborate on Civil 3D files, data shortcuts, and xrefs in one location, with easy design review in a web browser.
- **Collaboration for Plant 3D** Securely access AutoCAD Plant 3D files across teams and maintain compliance requirements in a cloud-based common data environment.

### Build

Autodesk Build provides a toolset for managing, sharing, and accessing project documents that results in streamlined workflows between the office, trailer, and jobsite. You can track the quality, inspections and safety of the project with issues and forms. Use RFIs, submittals, assets and meetings to manage the flow of information in the project. You can even track progress as the project evolves.

Autodesk Build also connects to preconstruction workflows in Autodesk BIM 360, BIM Collaborate, BIM Collaborate Pro (Design Collaboration and Model Coordination) and Cost Management for collaborating on designs, coordinating models, and managing costs.





- **Cost Management:** Connects and improves cost management on one platform. Drives forecast accuracy and predictable cash flow with real-time information and visibility into cost related risks.
- **Insight:** Delivers analytics from the data collected and analyzed, as well as the ability to export that data; encompasses Construction IQ artificial intelligence to identify and mitigate risk.
- **Administration:** Provides centralized user management and permissions, templates, and other tools for project setup, as well as a single authentication method for any unified product.







Autodesk Build also includes the Autodesk Construction Cloud mobile app (formerly PlanGrid), empowering teams to complete tasks from anywhere on the jobsite with seamless access to all project data, even when offline.







**Premium**








Premium offers additional administrative, security and support benefits that helps organizations operate more efficiently. Benefits of Premium include single sign-on, active directory sync, advanced reporting, premium coaching and advanced technical support.





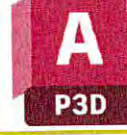


***AEC Collection Components – Titles, Uses, and Overview***







Component Number	Software Title	Uses	Overview
1		2D and 3D CAD, specialized toolsets and apps.	AutoCAD allows you to design every detail and accelerate 2D and 3D design documentation with new and enhanced productivity tools. Work and collaborate across integrated desktop, cloud, and mobile apps.
2		Design, Survey, Traffic, and Drafting	Civil 3D software is a civil engineering design and documentation solution that supports Building Information Modeling (BIM) workflows on a variety of civil infrastructure project types, including roads and highways, land development, rail, airports, and water.
3		Optimizes Grading	Grading Optimization for Civil 3D automates time-consuming grading tasks. Conduct grading design studies based on multiple project constraints to achieve an optimal grading solution and return the optimized proposal to Civil 3D for detailed design.
4		Share Design Data in 3D	Project Explorer for Civil 3D provides civil infrastructure professionals a more efficient way to access, interact, and share the design data in a Civil 3D model. Project Explorer simplifies project data navigation, review, and model editing, and enables efficient generation of custom, dynamic reports and tables.

Component Number	Software Title	Uses	Overview
5	Navisworks Manage 	Project review software with 4D and 5D analysis and design simulation	Navisworks Manage provides clash detection and advanced coordination, 5D analysis, and simulation
6	AutoCAD Map 3D 	Incorporate geographic information system and CAD data	AutoCAD Map 3D allows users to access, analyze, and share CAD and GIS data for planning, predesign, and management decisions with an industry-specific toolset for GIS and 3D mapping.
7	AutoCAD Raster Design 	Photo-edit scanned drawings and convert raster images to DWG™ objects.	AutoCAD Raster Design has raster to vector tools that allow conversion of raster images into DWG objects. Edit, enhance, and maintain scanned drawings and plans in a familiar AutoCAD environment.
8	Vehicle Tracking 	Vehicle swept path analysis software	Vehicle Tracking provides a set of transportation design tools that include vehicle swept path prediction for steered vehicles, light rail vehicles, and aircraft, as well as parking layout design and roundabout design.
9	3ds Max 	3D modeling, animation, and rendering software for and design visualization	3ds Max focuses on productivity, modern asset creation, and real-time workflows and brings new modeling capabilities to Retopology Tools and Working Pivot, user-requested enhancements to the Autobackup system, support for glTF to accelerate real-time collaboration, and more.
10	Structural Bridge Design 	Integrated loading, analysis, and code checking of small to medium-span bridges.	Structural Bridge Design offers a set of capabilities for the analysis and design of bridge structures using line beam, grillage, frame analysis, and finite element techniques, all integrated into one product.
11	Autodesk Rendering (Autodesk Service)	High-resolution renderings	Autodesk Rendering allows users to take advantage of virtually infinite computing power in the cloud to create high-resolution renderings in a fraction of the time, without the need for expensive hardware.

Component Number	Software Title	Uses	Overview
12	FormIt Pro 	Intuitive 3D sketching app with native Revit interoperability	FormIt 2023 brings major updates to the Revit integration including linking support, a new Edit in FormIt workflow, and new ways to preview and control which objects are sent to Revit. This release also includes new features in Dynamo and a host of core improvements including a new 2-point perspective camera, section plane and graphics enhancements, and impressive performance optimizations across the board.
13	InfraWorks 	Context modeling, conceptual design, analysis/simulation, and visualization	InfraWorks provides integration with GIS and other real-world data, allowing users to create a project context model that represents the built and natural environment. With InfraWorks, users can quickly lay out conceptual designs in-context, then use analysis and simulation tools to optimize designs based on realistic proposals. Compelling visualizations help to communicate design intent and improve project outcomes. Integration with Civil 3D and Revit for detailed design and construction brings together workflows across horizontal and vertical infrastructure projects.
14	Bridge Design / Parametric tunnels 	Autodesk Bridge Workflow	Bridge Design / Parametric tunnels supports Precast I Girder and Steel Plate Girder bridge types, which in turn supports different bridge deck, abutment, piers, girder, and bearing components. Default settings for these concrete and steel bridge types are represented by concrete and steel bridge assemblies within the Bridge catalog of the Style Palette. You can also modify these bridge styles or create new ones to apply to your bridge.
15	LIDAR Data Extraction for existing roadways 	Data Extraction from Point Clouds	The Point Cloud Terrain generation tool in InfraWorks filters non-ground points to deliver thin (information rich) point clouds and extract terrain data. These point clouds can then be used to create triangulated terrain directly or enforce breaklines for more detail.
16	Flood Simulation 	Simulate, visualize, and analyze 2D flood simulations	Flood simulation can be used for inland and coastal flooding projects depending on the parameters you define.
17	ReCap Pro 	Reality capture and 3D scanning software and services	Enables designers and engineers to capture high quality, detailed models of real-world assets. Use ReCap Pro to: <ul style="list-style-type: none"> <li>• understand and verify existing conditions and as-built assets to gain insights and make better decisions;</li> <li>• deliver a point cloud or mesh in support of BIM (Building Information Modeling) processes and collaborate across teams with real-world context;</li> <li>• Survey, plan, construct, and renovate building and infrastructure projects.</li> </ul>

Component Number	Software Title	Uses	Overview
18	Autodesk Docs 	Manage project information in a cloud-based, common data environment.	Cloud storage allows you to keep all project documentation in one location.
19	Autodesk Drive 	CAD-aware cloud storage for individuals and small teams	Cloud storage allows you to keep all project documentation in one location.
20	Revit 	Software for building information modeling (BIM)	Integrate vertical structures with horizontal infrastructure designs. Revit imports, exports, and links with commonly used BIM and CAD file formats, including IFC, 3DM, SKP, OBJ, and more.
21	Revit Architecture 	Plan, design, construct, and manage buildings with multidisciplinary BIM software.	During the conceptual design phase, create masses to explore ideas and perform early analyses. As the design matures, manipulate these forms to use as the basis for more detailed architecture.
22	Revit MEP 	Design complex mechanical, engineering, and plumbing systems	Revit MEP helps engineers, designers, and contractors across the mechanical, electrical, and plumbing (MEP) disciplines model to a high level of detail and easily coordinate with building project contributors.
23	Revit Structure 	Structural Engineering and Design	Streamline projects, from design concept to fabrication, with Revit. Improve installation accuracy and constructability by connecting the structural design to the detailed model.
24	Revit – Generative Design 	Generate design alternatives	Generative Design in Autodesk Revit allows quick generation of design alternatives based on your goals, constraints, and inputs to give you higher performing options for data-driven decision making.

Component Number	Software Title	Uses	Overview
25	AutoCAD Architecture 	Speed architectural design and drafting	Provides an industry-specific toolset that includes 8,000+ intelligent objects and styles for architectural design.
26	AutoCAD Electrical 	Efficiently create, modify, and document electrical controls systems	A complete package of electrical design CAD features for creating and managing designs for electrical engineers and control designers.
27	AutoCAD Mechanical 	Libraries of standards and custom content	Built for manufacturing, AutoCAD Mechanical design software includes all the functionality of AutoCAD, plus libraries of standards-based parts and tools to help accelerate mechanical CAD.
28	AutoCAD MEP 	Draft, design, and document building systems	AutoCAD MEP software helps you increase productivity with automated drafting tasks, manufacturer parts, and interference detection.
29	AutoCAD Plant 3D 	Create P&IDs and integrate them into a 3D plant design model	This release includes new features and enhancements such as ortho single-line piping, iso annotation setup, calculated properties, Data Manager import from Microsoft Excel, and search feature for collaboration and vault projects.
30	Robot Structural Analysis Pro 	Advanced BIM-integrated structural analysis and code compliance verification tool	This release installs Robot Structural Analysis Professional 2023 for Windows 10 and 11 64-bit Operating System.
31	Advance Steel 	3D modeling software for steel detailing.	Advance Steel detailing software is built on the AutoCAD platform. Structural engineering professionals use the software to help accelerate design, steel detailing, steel fabrication, and steel construction.

Component Number	Software Title	Uses	Overview
32	Fabrication CADmep 	MEP detailing and documentation software.	Fabrication CADmep™, Fabrication ESTmep™, and Fabrication CAMduct™ software use manufacturer-specific content to create more accurate detailed models, generate better estimates, and help drive MEP fabrication.
33	AutoCAD Web - Mobile App 	Draft, annotate, and add field data to drawings online via web browser or mobile device using core AutoCAD commands.	AutoCAD Web allows access and editing of DWG files for quick collaboration with other AutoCAD users on designs. Includes an easy-to-use interface and tools to upload, open, and edit DWG™ drawings. Supported on iOS, Android, and Windows 10 devices and Surface Hub.
34	Insight: Includes 	Building performance analysis	Design more energy-efficient buildings with advanced simulation engines and building performance analysis data integrated in Revit.
35	Energy Analysis 	Energy consumption	Capture whole building and system interactions with full dynamic thermal energy simulation using DOE 2.2. and EnergyPlus for sustainable design
36	Daylighting Analysis 	Daylight metrics	Simulate, calculate, and visualize key daylighting metrics, like daylight autonomy and annual sunlight exposure.
37	Green Building Studio 	Carbon footprint	Analyze the total building heating and cooling load calculations with the EnergyPlus heat balance method.

## Appendix C: Resumes

---

**Name and Title:** *Shaun Gaffrey*

**Company:** *DLT*

**Proposed Project Position:** *Contracts Manager*

### **Overview of Qualifications**

Mr. Gaffrey has over 23 years' experience in providing design technology solutions to the US Government, servicing sectors of State Transportation, Local Transportation, Federal Transportation, Federal DOD and Federal Civilian Accounts. As a Senior Director with DLT he acts as Autodesk's Master Government Aggregator to coordinate with Autodesk and their authorized partner community to provide a software and services solutions that is best in class. He manages complex projects around US Government and Transportation initiatives involving product and licensing transitions.

### **Experience**

Highlights of Mr. Gaffrey's relevant experience include:

- Oversight in dozens of complex government projects to assist in milestones, billing, invoicing and project completion
- Assisted in implementing successful Florida DOT migration from Bentley to Autodesk products
- Managing California Transportation Autodesk assets along with billing and invoicing
- Led implementation of DLT Aggregation model for Autodesk rolling out a new program led by DLT to collaborate with several types of authorized partners to service US Government customers
- Lead a team that manages over 10,000 purchases of Autodesk software annually from the US Government

### **Relevant Project Experience**

#### **Montana Department of Transportation**

Role: Contract Manager

Collaboration with Autodesk and Montana DOT to transition from legacy Bentley products to Autodesk products. Managing all invoicing and project deliverables with the customer with continued communication for their Autodesk assets

#### **Florida Department of Transportation**

Role: State and Local Manager

Collaborated with Autodesk and Florida DOT on migrating from legacy Bentley products to Autodesk products. Continued communication with customer with management of their Autodesk assets to current day while managing their software contract

#### **California Department of Transportation**

Role: Sr. Director, State and Local

Partnered with Autodesk and the customer, to transfer their significant assets to DLT. Worked with the customer to provide the appropriate government buying vehicle that assisted in simplifying the purchasing process. Since have assisted in managing their contract and all assets to include annual billing and invoicing.

#### **New York City Department of Transportation:**



**Role: Sr. Director, State and Local**

Collaborated with Autodesk, the Authorized Partner, and the customer to consolidate all assets to a single contract and streamline their product portfolio. Currently manages all assets for NYC DOT to include annual billing and invoicing.

***Employment History***

DLT Solutions:

- Senior Director – Jan. 2015 to current
- Division Director – Apr. 2013 to Dec. 2014
- Federal Manager – Nov. 2009 to Mar. 2013
- Eastern Region Manger – Jan. 2008 to Oct. 2009
- Eastern Team Lead – Mar. 2004 to Dec. 2007
- Government Account Representative – Nov. 2000 to Feb. 2004

***Education***

BA, Business Administration with a dual concentration in Marketing and Management –Cum Laude

***Professional Certifications and Registrations***

- Dale Carnegie Leadership Training Graduate
- Corporate Business Ethics Training for Management
- Leadership Development – “Situational Management”
- Managing Multiple Objectives Training
- Management for Success Training
- Target Account Selling for Managers
- Founding member and Chairman of DLT Foundation – charitable organization that gives back to local community

**Name and Title: Denver Galloway, Senior Project Manager**

**Company: U.S. CAD**

**Proposed Project Position: Project Manager**

***Overview of Qualifications***

Mr. Galloway has more than 20 years of experience in project management and the AEC industry and specializes in the implementation, training and support of Autodesk civil engineering products. He holds several Autodesk civil engineering certifications, including Autodesk Civil 3D Implementation Certified Expert (ICE) status and Autodesk Level 5 Application Engineer status. His expertise has resulted in the successful training of more than 1,500 CAD professionals and the implementation of Autodesk Civil 3D solutions to hundreds of customers. Mr. Galloway leads project multiple project teams from kick-off to completion with varying scopes and budgets, including new software implementations, teams moving from one solution to Autodesk, and teams who want to maximize their software investment. As a recognized industry expert, Mr. Galloway has worked to implement Civil 3D and Autodesk Infrastructure solutions for more than two decades for large and small firms across the United States. Additionally, he has authored nationally published articles, numerous training manuals and systems and been featured as a speaker at large industry events such as Autodesk University and Bluebeam Extreme Conference.

***Project Experience:***

**FAA**

Role: Project Manager

Managed the development of an implementation plan for moving from Bentley to Autodesk systems. Developed data transfer approach and a testing plan specific to the needs of the client.

**Kansas City International Airport**

Role: Project Manager

Oversaw BIM implementation activities and coordinated the QA/QC of complex modelling requirements. Kept the project on schedule and budget to maintain a successful project.

**Montana Department of Transportation**

Role: Project Manager

Managed a large team of people in the training and implementation of moving from Bentley to Autodesk software. Analyzed existing software application and created a workflow mapping from Bentley to Autodesk and created user training specifically addressing these requirements across the multi-tiered organization. Managed the project so that it was completed on time and on budget. Developed, managed, and maintained project scheduling and critical analytics to ensure project success.

***Professional Certifications and Registrations***

Autodesk Certified Professional; Autodesk Certified Implementation Expert  
AUGI Member

***Employment History***

U.S. CAD, 2006-present, Senior Project Manager  
Allgeir Martin, 2002-2006, Civil Design Technician  
Unique Metal, 2000-2002, Project Manager

***Education***

B.S. Business Management; Associates Degree in Civil Engineering Design

**Name and Title: Brad Shields, Senior Technical Specialist**  
**Company: U.S. CAD**  
**Proposed Project Position: Assistant/Deputy Project Manager**

***Overview of Qualifications***

Mr. Shields is a Senior Project Manager and certified Project Management Professional (PMP), with specific expertise in the areas of financial oversight, resource management, proactive problem identification and resolution, and operational improvements. He has been responsible for achieving operating goals for multi-million dollar companies, including ensuring the quality of documentation on major construction projects. He leads team members to ensure that the deliverables are completed on time and within budget. He is knowledgeable in accounting principles, budgeting, continuous process improvement plans, and management of scope creep. He has ten years of experience in successful change management initiatives requiring fast-paced execution, and in building comprehensive project plans to ensure every facet of projects is considered. He has mentored project managers, operation managers, and project teams in using interfacing technology to solve complex challenges and exceed project goals. He is currently responsible for updating/creating process improvement plans and for providing project management oversight.

***Project Experience:***

**Enterprise Refinery**

Role: Project Manager

Managed, led, and instructed employees onsite at the customer's refinery across multiple disciplines during an 18-month project. Responsible for planning, scheduling, and executing all training sessions to ensure success. Maintained accountability from conception to successful completion of all phases of the project.

**Government Agency Implementation Puget Sound Naval Shipyard, Drydock No. 6**

Role: Senior Project Manager

Accomplishments: Managed the conjoined construction projects and training of government agencies and hundreds of employees over six months. Kept the project on schedule and budget to maintain a successful project plan.

**Staff Enrichment, Implementation, and Training**

Role: Senior Project Manager

Wrote and managed the standardization of procedures, their deployment, implementation, and training across multi-tier organizations. Developed and implemented training for staff enrichment program of 100 employees across all organizational tiers. Mentored project managers, operation managers, and their teams using technology to reduce overall project risk and increase project success. Developed, managed, and maintained project scheduling and critical analytics.

***Professional Certifications and Registrations***

Project Management Professional (PMP): #2751145

***Employment History***

U.S. CAD, 2023-present, Senior Project Manager

Century Elevators, 2019-2022, Senior Project Manager

Mistras Group Inc, 2016-2019, Project Manager, Enterprise

PinnacleART, 2011-2016, Project Coordinator, The Americas

***Education***

AAS, Drafting, and Design

AS, Mathematics

**Name and Title: Aaron Powell, Senior Technical Specialist**  
**Company: U.S. CAD**  
**Proposed Project Position: Technical Lead**

***Overview of Qualifications***

Mr. Powell is a U.S. CAD Senior Technical Specialist with over 20 years of experience in Civil Engineering, Planning, Surveying, and software implementation and training. His leadership style, ability to motivate, and results-oriented approach continues to produce consistent achievement of business goals, performance metrics, and a high customer satisfaction rating. Mr. Powell has managed industry professionals, field personnel, trade subcontractors, and provided oversight to consultants, vendors, architects, engineers, and surveyors on more than 100 projects. He has directed complex land development projects, supervised residential and commercial projects, and implemented and effectively delivered successful training to 10 government agencies including Caltrans and Montana Department of Transportation (MDT). Mr. Powell has extensive knowledge of Autodesk AEC Collection; Team and Project Management of diverse groups ranging from consultants to contractors, Software Implementation and Training, Civil Design, Land Surveying, client communications and training scheduling.

***Experience***

Highlights of Mr. Powell's relevant experience include:

- Developed and implemented transportation workflows, training, and best practices for ten government agencies including two Departments of Transportation.
- Successfully leads his teams and organizations to notable achievements by maintaining accountability for the technology management of all project phases and maintaining day to day involvement in projects.
- Responsible for the development of training implementation to ensure client and user satisfaction with the Autodesk AEC Collection product line for over one hundred end users.
- Leadership and management of industry professionals, field personnel, subcontractors, and provided oversight to consultants, vendors, architects, engineers, and surveyors.
- Proactively identified project issues with Bentley and Autodesk software compatibility in order to expedite projects and avoid client expense and project delays.

***Projects***

**City of San Diego Engineering and Capital Projects**

Role: Senior Technical Specialist

Assisted the City of San Diego staff in identifying the City's current Autodesk software solution processes and workflows, desired needs and made recommendations to obtain their goals. Oversaw the implementation process that included Autodesk software content creation for AutoCAD, Civil 3D and Revit, Autodesk software training and establishment of the recommended procedures and workflows.

**Riverside County Flood Control (RCFC)**

Role: Senior Technical Lead

The RCFC is currently Migrating from Bentley to Autodesk solutions. U.S. CAD was hired to train, mentor, and support the Riverside County Flood Control RCFC staff during their pilot projects and the transition. Mr. Powell is leading the mentoring and support of Civil 3D, AutoCAD, Revit, BIM 360, Inventor and Infracore as the core software being utilized for design and collaboration.

**California Department of Transportation (Caltrans) Autodesk Migration Civil 3D Training and Implementation**

Role: Senior Technical Lead

Delivered high quality training of Autodesk design software to hundreds of Caltrans engineering staff across five Caltrans District offices over the span of 2.5 years. Collaborated with Caltrans training leads to schedule training content and Caltrans facilities to ensure strategic alignment with plans, policies, and schedules for the project. Always met or exceeded Caltrans expectations by proactively monitoring and reporting on all project deliverables against schedules, scope, and resources.

**Montana Department of Transportation (MDT) Autodesk Pilot Projects**

Role: Senior Technical Lead

Currently working with MDT on three pilot projects (Carter South, Cougar Creek and West Laurel Interchange) utilizing Autodesk Civil 3D, maintaining accountability for the technical management of all phases of the projects. Implemented and delivered Civil 3D and BIM360 training to more than 30 pilot program staff members. Continues to deliver remote mentoring to more than 30 staff members. Proactively monitors and reviews standard procedures, workflows, and best practices. Mentors MDT Staff on workflows and best practices utilizing Autodesk design software. Serves as direct point of contact for issues involving software and workflow issues.

**County of Kern Civil 3D Implementation, Training and Production**

Role: Senior Technical Lead

Provided strategic advice and developed efficient workflows for more than 30 employees throughout the training and implementation program.

Served as liaison, coordinated and collaborated with senior level management to provide production support, training, and mentoring by maintaining day-to-day involvement in the project.

***Employment History***

U.S. CAD, 2014-present, Sr. Technical Specialist  
Dewalt Corporation, 2011-2014, Senior Civil Designer  
WRA Engineering, 2005-2011, Operations Manager  
Quad Knopf, 2003-2005, CAD Manager  
William Rose & Associates, 2001-2003, Civil Designer

***Education***

BS, Business Management, University of Phoenix

***Professional Certifications and Registrations***

Autodesk Certified Professional  
AUGI Member

**Name and Title: Darin Peterson, Technical Support Director**

**Company: U.S. CAD**

**Proposed Project Position: Technical Support**

***Overview of Qualifications***

Mr. Peterson has over 30 years of experience as a highly technical and results driven professional with extensive real work experience in project delivery, organizational effectiveness, and advanced technical support. He has held leadership roles as an AEC Technical Support Manager, Director of Technology, and Director of Operations. Mr. Peterson is currently the Technical Support Director at U.S. CAD and is responsible for managing a team of dedicated resources to ensure customer support and satisfaction. He demonstrates a commitment to high professional ethical standards and consistently delivers leadership and vision in managing project teams on major projects and initiatives. His relevant project experience includes federal, state, and local government agencies including the Department of Defense and multiple Departments of Transportation, including Montana Department of Transportation (MDT). He has extensive knowledge of the Autodesk AEC Collection; Project team management, team leadership, effective communication of analytics to project team members, technical support tools development, and customer satisfaction.

***Experience***

**City of San Diego**

**Role: Technical Support Director**

Oversees a group of technical support specialists who have provided support services to the City of San Diego since April 2020. Since that time, his team has addressed and solved support tickets with subjects ranging from licensing, product activation, AutoCAD printing, product installations, product upgrades, assistance accessing Autodesk cloud tools and various product crashes. He continually monitors team performance and response times on support requests which has earned his team a 100% satisfaction score from the City of San Diego users.

**Montana Department of Transportation (MDT) Autodesk Pilot Projects**

**Role: Technical Support Director**

Currently supporting MDT on three pilot projects (Carter South, Cougar Creek and West Laurel Interchange) through the help desk online ticketing system that tracks support interactions from various channels. Developed and implemented a system for tracking, prioritizing, and resolving user support tickets. Leads a dedicated staff, through a centralized hub, to respond and successfully resolve technical issues. Manages a real-time interactive dashboard that allows both support agents and end user access and management of all information. Proactively monitors the support system to identify critical reasons for support tickets to build a roadmap of potential software and operational improvements.

**United States Department of Defense- US Army, Naval Information Warfare Center, National Guard**

**Role: Technical Support Director**

Manages a team of dedicated resources to address and resolve licensing, technical, and software issues. Actively monitors and ensures proper functionality of all support system functionality. Developed and implemented a personalized knowledgebase platform that allows end users to search for answers to frequently asked questions, view previously submitted tickets, and issue resolutions.

**United States Government – Indian Health Service**

**Role: Contract Manager Liaison**

Ensures a collaborative relationship and serves as a U.S.CAD technical expert on the Management Group that meets monthly to discuss support issues, versioning strategies, hardware challenges, license server issues, license quantities and renewals, training, templates, user manuals, and all other issues related to the 400+ Users of Autodesk products used within IHS. Oversees scheduling of customized live training, bi-monthly Live Web Based Trainings, provide Web Training recordings, attendance records, and certificates. Provides guidance and direction on the IHS National CAD Standards including the National Civil 3D Template and the IHS user manual. Oversees the creation of all software deployments for the current Autodesk product images including new software products, repairs to existing images, and development of future software images.

***Employment History***

Managed Design, LLC/U.S.CAD, 2018-present, Director of Operations/Technical Support Director  
Alignex, Inc./Managed Design, LLC, 2006-2018, Director of Technology/Director of Operations  
CAD/CAM Engineering Systems Inc., 2000-2006, AEC Group Manager  
CAD/CAM Engineering Systems Inc., 1999-2000, AEC Technical Support Manager  
CAD/CAM Engineering Systems Inc., 1991-1999, Technical Support Specialist  
Ellerbe Becket, 1989-1991, Information Analyst  
Ellerbe Becket, 1985-1989, Architectural Computer Draftsman

***Education***

AAT, Mechanical Drafting and Design



**Name and Title: KaDe King, Senior Technical Specialist**

**Company: U.S. CAD**

**Proposed Project Position: Training Lead**

***Overview of Qualifications***

Ms. King is a Senior Technical Specialist and the Training Manager at U.S. CAD. She has been using Autodesk products since 1987 and has been an Autodesk Authorized Instructor since 1993. As a Technical Specialist and Training Manager she provides training for all levels of AutoCAD, Map 3D, and Civil 3D. Her extensive experience includes the development, implementation, and distribution of customized training documentation to hundreds of companies, nation-wide, including multiple departments of transportation. Ms. King excels in relating to the individuals in her training classes and provides a memorable training experience by developing and delivering open enrollment, dedicated, and custom training courses that exceed client expectations. Ms. King's expertise includes Autodesk AutoCAD, Civil 3D, Map 3D and GIS implementation and training. She is also an Autodesk licensing specialist, consulting CAD Manager, experienced in deployment creation and documentation, and analytical assessments of training needs and requirements.

***Experience***

Highlights of Ms. King's relevant experience include:

- Responsible for the development, implementation, and delivery of customized training for more than one hundred companies nation-wide, including government and DOT engagements.
- Instructed and mentored thousands of staff members over her 23-year career.
- Authorized Instructor, subject matter expert, and trusted advisor for Autodesk customization, instruction, and licensing.
- President of Autodesk User Group International (AUGI)
- Analyzes, identifies, and accurately determines optimal software solutions and workflows to suit client needs and expectations.
- Autodesk Network Specialist: Extensive experience with the installation of Autodesk license management software, creating deployments, troubleshooting the license manager and troubleshooting deployment issues.
- CAD Management: Proactively monitors and analyzes customization tools to minimize issues related to software updates and migrations to newer versions.

**City of San Diego -Ongoing Training- Autodesk Products**

Role: Trainer

For the past 15 years, Ms. King has been providing training on Autodesk products to the City's Utilities department on an as-needed basis. She has developed, customized and implemented training which was designed and developed to maximize efficiency of both the user and the software.

**City of Los Angeles Department of Transportation (LADOT) Autodesk Upgrade 2009 or 2010**

Role: Senior Technical Lead

Developed and implemented software customization, training, and deployments to over one hundred staff members over a six-month period. Assessed, analyzed, and monitored every single computer to verify system specifications met requirements to maximize efficiency and prevent down time. Created and implemented custom content and tools to ensure efficiency and accuracy. Responsible for the development and distribution of training materials including progress reporting to the contract team.

**California Department of Transportation (Caltrans) Autodesk Migration - Civil 3D Training and Implementation**

Role: Instructor

Delivered training of Autodesk Civil 3D to over 100 Caltrans engineering staff across three districts over a one-year period. Collaborated with Caltrans training leads to schedule training and provided quality assurance of training documentation and delivery. Responsible for maintaining project schedule and delivering quality instruction on Road Design.

**Burbank Department of Water and Power**

Role: Senior Technical Lead

Oversees and maintains the development and distribution of training materials for product upgrades and customization. Developed training plans and provided instruction and mentoring on multiple projects to upwards of 30 staff members over two-year periods. Developed and implemented AutoCAD customization to meet department needs for increasing efficiency.

***Employment History***

U.S. CAD, 2001-present, Sr. Technical Specialist & Training Manager

Cordax, 1999-2001, Technical Specialist & Training Manager

MTI College, 1995-1999, Trainer & Training Center Manager

Salt Lake Community College, 1993-1995, Adjunct Instructor

Northwest Pipeline/Williams Field Services (The Williams Companies), 1990-1995, CAD Technician

Dilok Corporation, 1990, CAD Technician

Wilson Electrical Engineering, 1989-1990, CAD Technician

***Education***

AAS, Computer Aided Design

***Professional Certifications and Registrations***

Autodesk User Group International (AUGI), President 2021

Autodesk Certified Professional; AutoCAD and Civil 3D

Autodesk Certified Instructor

***Awards***

Autodesk ATC Instructor Quality Award 1999, 2003 & 2005

**Name and Title: Shaun Gaffrey**  
**Company: DLT**  
**Proposed Project Position: Contracts Manager**

**Overview of Qualifications**

Mr. Gaffrey has over 23 years' experience in providing design technology solutions to the US Government, servicing sectors of State Transportation, Local Transportation, Federal Transportation, Federal DOD and Federal Civilian Accounts. As a Senior Director with DLT he acts as Autodesk's Master Government Aggregator to coordinate with Autodesk and their authorized partner community to provide software and services solutions that are best in class. He manages complex projects around US Government and Transportation initiatives involving product and licensing transitions.

**Experience**

Highlights of Mr. Gaffrey's relevant experience include:

- Oversight in dozens of complex government projects to assist in milestones, billing, invoicing and project completion
- Assisted in implementing successful Florida DOT migration from Bentley to Autodesk products
- Managing California Transportation Autodesk assets along with billing and invoicing
- Led implementation of DLT Aggregation model for Autodesk rolling out a new program led by DLT to collaborate with several types of authorized partners to service US Government customers
- Lead a team that manages over 10,000 purchases of Autodesk software annually from the US Government

**Relevant Project Experience**

**Montana Department of Transportation**

Role: Contract Manager

Collaboration with Autodesk and Montana DOT to transition from legacy Bentley products to Autodesk products. Managing all invoicing and project deliverables with the customer with continued communication for their Autodesk assets

**Florida Department of Transportation**

Role: State and Local Manager

Collaborated with Autodesk and Florida DOT on migrating from legacy Bentley products to Autodesk products. Continued communication with customer with management of their Autodesk assets to current day while managing their software contract

**California Department of Transportation**

Role: Sr. Director, State and Local

Partnered with Autodesk and the customer, to transfer their significant assets to DLT. Worked with the customer to provide the appropriate government buying vehicle that assisted in simplifying the purchasing process. Since have assisted in managing their contract and all assets to include annual billing and invoicing.

**New York City Department of Transportation:**

Role: Sr. Director, State and Local

Collaborated with Autodesk, the Authorized Partner, and the customer to consolidate all assets to a single contract and streamline their product portfolio. Currently manages all assets for NYC DOT to

include annual billing and invoicing.

***Employment History***

DLT Solutions:

- Senior Director – Jan. 2015 to current
- Division Director – Apr. 2013 to Dec. 2014
- Federal Manager – Nov. 2009 to Mar. 2013
- Eastern Region Manger – Jan. 2008 to Oct. 2009
- Eastern Team Lead – Mar. 2004 to Dec. 2007
- Government Account Representative – Nov. 2000 to Feb. 2004

***Education***

BA, Business Administration with a dual concentration in Marketing and Management –Cum Laude

***Professional Certifications and Registrations***

- Dale Carnegie Leadership Training Graduate
- Corporate Business Ethics Training for Management
- Leadership Development – “Situational Management”
- Managing Multiple Objectives Training
- Management for Success Training
- Target Account Selling for Managers
- Founding member and Chairman of DLT Foundation – charitable organization that gives back to local community

Resumes for non-key staff who will be providing assistance to the project on an as-needed basis are included on the following pages as an illustration of U.S. CAD's depth of resources and experience available to the City.

**Name and Title:** Ron Couillard, Technology Consultant / Team Lead  
**Company:** U.S. CAD  
**Proposed Project Position:** Road Design Technical Lead/Trainer

#### **Overview of Qualifications**

Mr. Couillard brings more than 24 years of civil infrastructure industry experience to his new role, where he will be tasked with providing clients with technology, software, and hardware recommendations to help solve their business needs. He leverages his experience as CAD Manager and Senior Civil Designer to address challenges that are unique to the civil infrastructure of U.S. CAD clients. Prior to joining U.S. CAD, Mr. Couillard provided technical expertise and training with another Autodesk Value Added Reseller. He has extensive knowledge of Autodesk Civil 3D workflows; software implementation and training, exporting data from field equipment, importing survey data, utilizing automation tools, client communications and training.

#### **Experience**

Highlights of Mr. Couillard's experience include:

- Developing and overseeing implementation strategies
- Providing civil design and project oversight, and in developing solutions and best practices
- BIM Coordination: develops solutions during design processes.
- Training: customizes training to be audience-appropriate and interactive to help improve user's performance and knowledge.
- Project Strategy: manages consulting, development and marketing projects of any size, including those where goals must be clarified, and alternative approaches must be identified and selected.
- Technical Expertise: leverages familiarity with software and programming to provide clients with support for CAD database management, license servers, and networking.

#### **Relevant Project Experience**

##### **Project Name: Montana Department of Transportation (MDT)**

Role: Senior Technical Specialist/Lead Trainer

Provided training on Autodesk products to MDT staff during the transition from legacy Bentley products to Autodesk AEC. Developed a training approach that was user-friendly and convenient in response to restrictions during lockdown; received positive feedback from client regarding his accommodating and efficient approach. Also developed templates, custom user guides and other training-related documentation that were instrumental in the smooth transition to Autodesk. Responsibilities also include ongoing user mentoring.

#### **Relevant Project Experience**

##### **Project Name: New Mexico Department of Transportation-**

Role: Senior Technical Specialist/Lead Trainer

Provided training on Autodesk products to New Mexico DOT staff during the transition from legacy Bentley products to Autodesk AEC. As with MDT, he developed a training approach that was user-friendly and convenient in response to restrictions during lockdown; received positive feedback from client regarding his accommodating and efficient approach. Also developed templates, custom user guides and other training-related documentation that were instrumental in the smooth transition to Autodesk. Responsibilities also included ongoing user mentoring.

**Bureau of Indian Affairs – Survey Training**

**Autodesk Civil 3D Training**

Role: Senior Technical Lead

- Developed and delivered customized survey training specific to the survey tasks required by BIA.
- Topics included Points, Point insertion into Civil 3D, and Coordinate Geometry.
- Achieved consistent and positive reviews.

***Education***

A.A.S CAD Technology

***Employment History***

U.S. CAD, 2020- present, Technology Consultant, Team Lead  
CADSoft Consulting, 2014-2016, Infrastructure Solutions Engineer  
Wood, Patel and Associates, 2014, CAD Manager, Sr. Civil Designer  
CADSoft Consulting, 2006-2014, AEC Technical Consultant  
Grenier Engineering, 2005-2006, Sr. Civil Designer

***Licenses and Certifications***

AutoCAD 2015 certified professional  
Autodesk Certified Instructor  
Civil 3D 2013, 2015 Professional Certification

**Name and Title:** Michael Gaines, Senior Technical Specialist  
**Company:** U.S. CAD  
**Proposed Project Position:** Survey Technical Lead

**Overview of Qualifications**

Mr. Gaines brings more than 20 years of experience in drafting/design, graphical representation and knowledge of Autodesk design products to his role at U.S. CAD. He has provided extensive training on Autodesk products and has first-hand knowledge on the successful implementation of Autodesk solutions. Mr. Gaines' experience has provided him with the expertise to lead and manage diverse teams and organizations to meet client expectations on budget, schedule and overall satisfaction with the work provided. Mr. Gaines was instrumental in the successful replacement of Bentley products with Autodesk software for the state of Montana Department of Transportation, where he was responsible for end-user training. His leadership style and approach to mentoring and training has provided clients with consistent and positive solutions on challenging projects.

**Experience**

Highlights of Mr. Gaines' experience include

- Development and implementation of custom standards, solutions and best practices, particularly on civil design projects, tailored to desired environment and workflows
- Overseeing the implementation of recommended solutions including Autodesk Civil3D
- Develops and delivers customizes training designed to improve user performance and knowledge
- Leads teams in meeting deliverable deadlines while ensuring project alignment and client expectations/needs are met.

**Relevant Project Experience**

**Project Name: Montana Department of Transportation-**

Role: Senior Technical Specialist/Lead Trainer

Provided training on Autodesk products to Montana DOT staff during the transition from legacy Bentley products to Autodesk AEC. Developed a training approach that was user-friendly and convenient in response to restrictions during lockdown; received positive feedback from client regarding his accommodating and efficient approach. Also developed templates, custom user guides and other training-related documentation that were instrumental in the smooth transition to Autodesk. Responsibilities also included ongoing user mentoring.

**Riverside County Flood Control District**

Role: Senior Technical Specialist

Migrated Engineering and Survey staff from Bentley to Autodesk AEC Collection. Responsible for providing C3D Template Creation and Testing, Custom User Guide Content Creation per customer workflows and standards. Delivered customized user training and provided ongoing user mentoring.

**Riverside County Department of Waste Resources (RCDWR)**

Role: Senior Technical Specialist

Currently working with RCDWR to move them from Bentley to the same Autodesk platform as the Riverside County Flood Control District, with whom they work closely. Created and executed an approach that provides everyone on the same AEC platform for ease of collaboration and data sharing. Created and tested the C3D Template and developed custom user guide content based on customer workflows and standards. Delivered Custom User Training and provides user mentoring.



***Employment History***

U.S. CAD, 2019- present, Sr. Technical Specialist

Hoskin Ryan Consultants, 2018- 2019, CAD Manager

QK (formerly Quad Knopf), 2005-2018, Sr. CAD Designer/CADD Leader

Butler Manufacturing, 2001-2005- Lead Steel Detailer

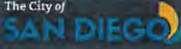
CB Performance, 1994-2001, Art Director, Graphic Artist, Machinist

## Appendix D: Security Letter from Autodesk

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Appendix D -  
Security Letter from

EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D			
ID	City Requirement	Solution Compliance	Proposer Comments
		<b>PROPOSER (ORGANIZATION) NAME HERE</b>	
<b>1 Audit and Compliance</b>		<b>Solution Compliance</b>	<b>Proposer Comments</b>
1.01	<b>Log.</b> All actions performed within the CADD solution must record a time stamp upon completion of a task or activity and version control.	Fully Compliant	<p>Autodesk Civil 3D can record all changes in design history to enable revision control. Using the Autodesk Construction Cloud (ACC), a version history is recorded of all drawing changes. A history is logged of every save of a design file. A detailed account of the history of the document is logged. From this history, you can see the current version, set current any version of a drawing (roll back) see who upload the documents and when the modifications were made. You can copy, download, or make current any version in the history. You can compare two versions of the file to see what's changed from version to version. In addition, the Drawing History command allows you to view the version history of drawings stored in the cloud in the new Drawing History palette, where you can compare them with the current version of your drawing.</p> <p>When restored, the previous version maintains all references to other data.</p> <p>Revit journal files capture the actions taken by the software during a session of Revit, from the time the software starts to the time it stops. More information can be found in the help article About Revit Journals (<a href="https://help.autodesk.com/view/RVT/2022/ENU?guid=GUID-477C6854-2724-4B5D-8B95-9657B636C48D">https://help.autodesk.com/view/RVT/2022/ENU?guid=GUID-477C6854-2724-4B5D-8B95-9657B636C48D</a>)</p> <p>Autodesk's My Insights is personalized information that is shown to you as individual insights and to your product administrator as team-based insights, both of which are based on your usage of an Autodesk product. Insight content is designed to be informative and actionable. Here are some of the insight types we generate based on product usage data:</p> <ul style="list-style-type: none"> <li>• Application performance and drawing file statistics reports</li> <li>• Command summary usage report</li> <li>• Command and feature recommendations</li> <li>• Learning paths and tips</li> <li>• Command macro recommendations</li> </ul> <p>We currently provide insights for these products:</p> <ul style="list-style-type: none"> <li>• AutoCAD on Windows for the latest and back four releases</li> <li>• Revit for the latest and back three releases</li> </ul> <p>Read more about My Insight at <a href="https://help.autodesk.com/view/ADSKAPI/ENU?guid=adsk_api_about_autodesk_my_insights">https://help.autodesk.com/view/ADSKAPI/ENU?guid=adsk_api_about_autodesk_my_insights</a></p>
1.02	<b>CADD.</b> Logs of CADD activity are required to facilitate error management relating to functionality	Fully Compliant	<p>The Activity log within the Autodesk Construction Cloud provides a chronological record of project activities associated with the Document Management module. Each activity is recorded by date, time, user, and action taken.</p> <p>Revit journal files capture the actions taken by the software during a session of Revit, from the time the software starts to the time it stops. These text files can help troubleshoot technical problems with the software. More information can be found in the help article About Revit Journals (<a href="https://help.autodesk.com/view/RVT/2022/ENU?guid=GUID-477C6854-2724-4B5D-8B95-9657B636C48D">https://help.autodesk.com/view/RVT/2022/ENU?guid=GUID-477C6854-2724-4B5D-8B95-9657B636C48D</a>)</p> <p>The Civil 3D Survey database provides an audit file that records all errors and subsequent edits made to the survey data. This file provides date/time/author for all edits to the survey data.</p> <p>The Civil 3D Event Viewer dialog provides feedback to issues with data import, export, crossing breaklines, tangencies, and other engineering data-related issues.</p> <p>Windows Event logs can be obtained for diagnostics and troubleshooting of Autodesk desktop products. Learn more on how to get Windows Event Logs (<a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Obtaining-Windows-Event-Logs-for-diagnostics-and-troubleshooting.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Obtaining-Windows-Event-Logs-for-diagnostics-and-troubleshooting.html</a>)</p> <p>Revit journal files capture the actions taken by the software during a session of Revit, from the time the software starts to the time it stops. These text files can help troubleshoot technical problems with the software. More information can be found in the help article About Revit Journals (<a href="https://help.autodesk.com/view/RVT/2022/ENU?guid=GUID-477C6854-2724-4B5D-8B95-9657B636C48D">https://help.autodesk.com/view/RVT/2022/ENU?guid=GUID-477C6854-2724-4B5D-8B95-9657B636C48D</a>)</p>
1.03	<b>Synchronization.</b> All transmissions between the CADD Solution on the computers and the back end system must be logged for error resolution.	Fully Compliant	<p>Windows Event logs can be obtained for diagnostics and troubleshooting of Autodesk desktop products. Learn more on how to get Windows Event Logs (<a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Obtaining-Windows-Event-Logs-for-diagnostics-and-troubleshooting.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Obtaining-Windows-Event-Logs-for-diagnostics-and-troubleshooting.html</a>)</p> <p>The Activity log within the Autodesk Construction Cloud provides a chronological record of project activities associated with the Document Management module. Each activity is recorded by date, time, user, and action taken. From this history, you can see the current version, set current any version of a drawing (roll back) see who upload the documents and when the modifications were made. You can copy, download, or make current any version in the history. You can compare two versions of the file to see what's changed from version to version.</p>

**EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D**



**Proposer Completes** note: Proposers should not alter the format of this response sheet. Please hover over "Solution Compliance" call for directions. Each call must be answered!

**Solution Compliance:** Proposer Comments. Proposer must describe, in detail, exactly how solution does (or does not) comply. If not fully compliant, please provide proposed workarounds, planned updates, (with timelines) or alternatives, as available (as associated costs, as applicable).

ID City Requirement

1.04 **Reporting.** The CADD solution must have the ability to identify the last version, date, time and user of the application on the server.

Fully Compliant

Autodesk Civil 3D can record all changes in design history to enable revision control. Using Autodesk Construction Cloud (ACC), a version history is recorded for all drawing changes. A history is logged of every save of a design file. A detailed account of the history of the document is logged. From this history, you can see the current version, set current any version of a drawing (roll back), see who upload the documents and when the modifications were made. You can copy, download, or make current any version in the history. You can compare two versions of the file to see what's changed from version to version. In addition, the Drawing History command allows you to view the version history of drawings stored in the cloud in the new Drawing History palette, where you can compare them with the current version of your drawing. Version number, date, time, and which user made the file edits will all be recorded.

When restored, the previous version maintains all references to other data.

1.05 **Evolution.** The CADD solution must be capable of providing additional Audit and Compliance functionality as determined by the City in the future.

Fully Compliant

Autodesk implements security policies based on industry best practices and regularly conducts internal and external audits, attestations, and third-party security assessments. Autodesk has selected industry standard attestations and certifications for our products—SSAE-16 AT 101 SOC 2 attestation ISO 27001, ISO 27017, ISO 27018 certifications.

Autodesk performs regular internal audits and risk assessments to monitor for changes in the environment, test our policies and procedures, and identify new and emerging risks. We test our systems, infrastructure, products, and services to identify the exploitability of these assets and discover their vulnerabilities to better secure and protect our customers.

Please refer to the Autodesk Trust Center for additional information at <https://www.autodesk.com/trust/compliance>

**2 Technical Capabilities**

Solution Compliance

Proposer Comments

2.01 **Scalability.** The CADD Solution must provide ability to scale with a low degree of complexity.

Fully Compliant

Autodesk Construction Cloud (Docs) provides unlimited data storage to handle any project size and number of users.

2.02 **Offline Use.** CADD Solution must provide ability for back-end use with an option for development and production environments.

Fully Compliant

Autodesk Construction Cloud provides the ability to set up separate project for test and development. These projects can be limited by your team to the individuals about to set up and join the projects. This keeps the test and development projects completely separated from the production project without requiring a completely separate instance on the system.

Project Explorer offers a simplified approach to understanding Civil 3D design and helps users to review, validate, report, export, edit drawing data, and plotting. Using Project Explorer you can develop a better understanding of a design, and can more efficiently control the distribution of geometric information to project stakeholders.

At its core, Project Explorer functions as a central hub for managing and easily accessing project data. Here are a few of the ways you can leverage Project Explorer to streamline project workflows.

- Project Explorer allows users to simplify access and navigation to important project data
- Simplify project data navigation, review, and design model editing
- More easily discover and evaluate design criteria warnings to help meet design standards
- Efficiently generate custom reports and tables that help meet delivery requirements

Discover more about Project Explorer at <https://help.autodesk.com/view/CV3D/2023/ENU/?guid=ProjectExplorer>.

2.03 **Plotting/ Printing.** CADD Solution must provide either an integrated forms capability, proprietary forms engine or the ability to integrate with an external forms engine and print/ plot functionality.

Fully Compliant

Sheet Set Manager: Civil 3D can insert, reorder and number drawings. This is accomplished using the PLOT option within the Sheet Set Manager tool. Civil 3D can manage and automate the creation of plan sheets by invoking the Sheet Set Manager tool. The end user can add plan sheet borders and auto-populate certain content and plan sheet information using sheet sets. This includes but is not limited to sheet numbers, scale, file references, name, plot date, folder location, and author.

A Sheet Set is used to manage a collection of plan sheets associated with a project. Using the Sheet Set Manager, an entire collection of plan sheets can be navigated, renumbered, batch printed, or archived. Sheet sets are created using the "New Sheet Set" option within the Sheet Set Manager Palette. After a sheet set has been defined, existing layouts can be dragged and dropped onto the palette to add them to the set. Each layout name is then displayed on the palette within an overall list of sheets. If desired, layouts can be dragged up or down to match the plan set order. They can also be grouped into customizable categories to further organize the overall plan set. Each layout in the list represents a hyperlink that can open the drawing. This feature allows the Sheet Set Manager to be a single access point for all project sheets, eliminating the need to navigate project folders to locate drawings.

Plotting: Civil 3D can plot documents to PDF or paper. In either case, the output documents are created using the PLOT command. Because the PLOT command can be used in both model space and layout views, the PDF created is not limited to a specific plan sheet. Instead, besides construction documents or plan sheets, it can also create quick ad-hoc PDF files of various model views. Civil 3D can automatically create a multi-sheet PDF file if a model contains multiple layout views. Civil 3D also supports many plot configuration options when creating a PDF file. These settings allow the end user to customize the PDF-created layout views.

**EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D**



**Proposer Completes** note: Proposers should not alter the format of this response sheet, please hover over "Solution Compliance" cell for directions. Each cell must be answered.

ID	City Requirement	Solution Compliance
2.04	<b>Data.</b> CADD solution must allow data to be synchronized or integrated with the CADD databases.	<p><b>Fully Compliant</b></p> <p>Civil 3D enables the end user to synchronize data with CADD and GIS databases.</p> <p>When using the MAPARCGISCONNECTOR command, the end user can bring GIS data into the Civil 3D environment as FDO layers. (FDO = Feature Data Objects, which is an open-source Data Access Technology.) Using FDO layers, the end user can view both attributes &amp; geometry, and apply symbology to GIS data referenced from ArcGIS. Whether using ARCGISCONNECTOR or MAPARCGISCONNECTOR commands, the GIS data stays in its original location and any updates made to the source data can be refreshed in Civil 3D. If desired, modifications can also be made to the data within Civil 3D and saved back to the GIS source.</p> <p>Using Civil 3D data shortcuts supports multiple departments or groups with varied workflows to work within the same project. Data shortcut provides a direct path to the location of a shareable source object. In a single operation, you can create data shortcuts for multiple objects in a source drawing. The data shortcut is used only for the creation of data references. A data reference is a read-only copy of a source object, inserted into another drawing, often called a consumer drawing. You can select a shortcut for an object and create a reference to that object in the active drawing. The data reference maintains an active link to the source object in the source drawing, without relying on the data shortcut.</p> <p>Learn more About Data Shortcuts at <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=GUID-E91D2116-0F01-4A6B-B9C6-A47ED56F0F5F">https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=GUID-E91D2116-0F01-4A6B-B9C6-A47ED56F0F5F</a>.</p>
2.05	<b>Development.</b> Out of the box forms must be capable of customization or development with minimal complexity.	<p><b>Fully Compliant</b></p> <p>Project Explorer offers a simplified approach to understanding Civil 3D design and helps users to review, validate, report, export, edit drawing data, and plotting. Using Project Explorer you can develop a better understanding of a design, and can more efficiently control the distribution of geometric information to project stakeholders.</p> <p>At its core, Project Explorer functions as a central hub for managing and easily accessing project data. Here are a few of the ways you can leverage Project Explorer to streamline project workflows.</p> <ul style="list-style-type: none"> <li>Project Explorer allows users to simplify access and navigation to important project data</li> <li>Simplify project data navigation, review, and design model editing</li> <li>More easily discover and evaluate design criteria warnings to help meet design standards</li> <li>Efficiently generate custom reports and tables that help meet delivery requirements</li> </ul> <p>Discover more on Project Explorer at <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=ProjectExplorer">https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=ProjectExplorer</a>.</p> <p>The Forms tool in Autodesk Construction Clouds' Build enables your team to fill out, review, and manage project forms. This provides a single secure point to coordinate data collection, photos, and follow-up documents. Create templates for checklists, daily logs, or other forms for your team, and anyone can complete the forms on site through our Autodesk Construction Cloud mobile app or at the office on the web. You can always use the pre-configured templates in the Forms tool. However, setting up your own custom form templates will give you and your team more control over your forms. You can upload a smart PDF to create a template in the Forms tool. Smart PDFs contain dynamic fillable fields, which contributors can fill out in the Forms tool directly.</p> <p>Learn more on how to Create a Form Template from a Smart PDF at <a href="https://help.autodesk.com/view/BUILD/ENU/?guid=Build_Forms_smart_pdf">https://help.autodesk.com/view/BUILD/ENU/?guid=Build_Forms_smart_pdf</a></p>
2.06	<b>Environment.</b> The CADD solution has the ability to function in the City's current platform.	<p><b>Fully Compliant</b></p> <p>Autodesk Civil 3D and Revit can function in the City's current platform.</p> <p>Civil 3D system requirements: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a></p> <p>Revit 2023 system requirements: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html</a></p> <p>Specific URLs or protocols for Autodesk subscription licensing are needed to pass through a firewall or proxy system in order to operate correctly. <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/What-URLs-protocols-should-be-accessible-for-Desktop-Subscription-to-work.html.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/What-URLs-protocols-should-be-accessible-for-Desktop-Subscription-to-work.html.html</a></p>


EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D			
ID	City Requirement	Proposer Completes	<small>note: Proposers should not alter the format of this response sheet, please hover over "Solution Compliance" cell for directions. Each cell must be answered.</small>
		Solution Compliance:	<small>Proposer Comments. Proposer must describe, in detail, exactly how solution does (or does not) comply. If not fully compliant, please provide proposed workarounds, planned updates, (with timelines) or alternatives, as available (as associated costs, as applicable).</small>
2.07	<b>Portal.</b> CADD Solution must provide availability of a desktop portal and /or the capability to integrate with City's environment, which provides the System User with visibility into current work files/ folders, drawings, models, work in pending status, ESRI maps ands other 3rd party applications.	Fully Compliant	<p>Autodesk has partnered with ESRI to seamlessly integrate the ability to access ESRI data from a GIS enterprise solution installed on site or an enterprise solution that is hosted in the ESRI cloud. Civil 3D can consume current ESRI ArcGIS Map, Feature, and Image Services. The information below covers the methods available.</p> <p>This integration enables the Civil 3D user to import and export to ESRI ArcGIS Map the geometric design data, including: cogo points, alignments, parcels Feature lines, and pipe networks. By having a coordinate system defined in the Civil 3D drawing file, the Output-Publish to ArcGIS command will publish whatever geometric data the user selects directly to the ArcGIS environment. This information can then be used in the ArcGIS environment for standard GIS workflows. Once the user is ready to pull the data back into the Civil 3D environment, the user will create a Civil 3D drawing file with the coordinate of choice. Using the Insert-Autodesk Connector for GIS command, the user can import into the active drawing the Civil 3D objects that are desired. During this process, the Civil 3D data will be translated on-the-fly to the active Civil 3D drawings coordinate system. Extended attribution on Civil geometric entities will come in as Property Sets within the Civil 3D environment. ESRI file geodatabases can be downloaded from the GIS system and used on data collectors or other mobile devices as well.</p> <p>When you select raster data to import, the Import Raster Data from Autodesk Connector for ArcGIS enables you to bring raster data from ArcGIS Image Services into Civil 3D as Imagery or create a surface from the raster data. An image with elevation data can be imported as imagery, or a surface can be created from it, but an image without elevation data can only be imported as Imagery. Learn more at <a href="https://help.autodesk.com/view/CIV3D/2021/ENU/?guid=GUID-2E07704F-D304-443F-97A1-01B009F7882B">https://help.autodesk.com/view/CIV3D/2021/ENU/?guid=GUID-2E07704F-D304-443F-97A1-01B009F7882B</a></p> <p>Through implementing Permissions, Autodesk Construction Cloud provides visibility into current work files/folders, drawings, and models. Learn more on Folder Permissions withing Autodesk Construction Cloud at <a href="https://help.autodesk.com/view/DOCS/ENU/?guid=Folder_Permissions">https://help.autodesk.com/view/DOCS/ENU/?guid=Folder_Permissions</a>.</p> <p>The Autodesk Construction Cloud Review process provides visibility into work in pending status. The approval workflow feature enables document managers to facilitate, control, and automate the distribution of files to project members. Members designated as reviewers can then review and comment on the files, and members designated as approvers can give final approval for the files to be used. Learn more about Reviews in Autodesk Construction Cloud at <a href="https://help.autodesk.com/view/DOCS/ENU/?guid=Reviews">https://help.autodesk.com/view/DOCS/ENU/?guid=Reviews</a>.</p> <p>Account Administrators within the Autodesk Construction Cloud can manage project templates, while Project Administrators can manage workflows, forms, and files in the system.</p> <p>The Forms tool in Autodesk Construction Clouds' Build enables your team to fill out, review, and manage project forms. This provides a single secure point to coordinate data collection, photos, and follow-up documents. You can always use the pre-configured templates in the Forms tool. However, setting up your own custom form templates will give you and your team more control over your forms. You can upload a smart PDF to create a template in the Forms tool. Smart PDFs contain dynamic fillable fields, which contributors can fill out in the Forms tool directly.</p> <p>Learn more on how to Create Form Templates at <a href="https://help.autodesk.com/view/BUILD/ENU/?guid=Build_Forms_templates_html">https://help.autodesk.com/view/BUILD/ENU/?guid=Build_Forms_templates_html</a>.</p>
2.08	<b>Templates.</b> CADD Solution must provide ability to create form templates for various types of activities such as inspections, measurements capture, found assets etc.	Fully Compliant	<p>The Forms tool in Autodesk Construction Clouds' Build enables your team to fill out, review, and manage project forms. This provides a single secure point to coordinate data collection, photos, and follow-up documents. You can always use the pre-configured templates in the Forms tool. However, setting up your own custom form templates will give you and your team more control over your forms. You can upload a smart PDF to create a template in the Forms tool. Smart PDFs contain dynamic fillable fields, which contributors can fill out in the Forms tool directly.</p> <p>Learn more on how to Create Form Templates at <a href="https://help.autodesk.com/view/BUILD/ENU/?guid=Build_Forms_templates_html">https://help.autodesk.com/view/BUILD/ENU/?guid=Build_Forms_templates_html</a>.</p>
2.09	<b>Ease of Use.</b> CADD Solution must provide an easy method of uploading, importing, exporting documents and photogrammetry used formats to OpenText. This methodology should be compliant and in adherence to ADA guidelines for user interfaces.	Partially Compliant	<p>Autodesk Revit can export models to the following file formats for to be uploaded into OpenText: PDF, STL, JPG, BMP, PNG, DWG, DWF, DWFx, TIFF, HTML</p> <p>Autodesk Civil 3D can export drawings to the following file formats to be uploaded into OpenText: PDF, DWF, DWFx, JPG, PNG, XPS, TIFF, HTML.</p> <p>Autodesk has been actively working to make both desktop and cloud tools WCAG 2.0 compatible. Many of the desktop design tools included as offering to this response (C3D, Revit, etc) are WCAG compatible (complete list of Voluntary Product Accessibility Templates (VPATs) can be found on the Autodesk Section 508 accessibility compliance site <a href="https://www.autodesk.com/solutions/government/section-508-accessibility-compliance">https://www.autodesk.com/solutions/government/section-508-accessibility-compliance</a>.</p> <p>Autodesk BIM Collaborate Pro, as also part of the offerings, has not been reviewed for WCAG 2.0 compliance.</p>


EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D			
ID	City Requirement	Solution Compliance	Proposer Comments
			<p><b>Proposer Completes</b> <i>note: Proposers should not alter the format of this response sheet, please hover over "Solution Compliance" cell for directions. Each cell must be answered.</i></p> <p><b>Proposer Comments:</b> Proposer must describe, in detail, exactly how solution does (or does not) comply. If not fully compliant, please provide proposed workarounds, planned updates, (with timelines) or alternatives, as available (as associated costs, as applicable).</p>
2.10	<b>Customization.</b> CADD Solution must provide ability to customize cells, cell libraries, feature classes, attributes, mapping displays, drawings, models and imagery.	Fully Compliant	<p>Civil 3D supports customized element symbology. This includes, but is not limited to: cells/blocks, feature classes, attributes, mapping displays, drawings, models and imagery.</p> <p><b>ATTRIBUTES</b> Attributes within Civil 3D are generally represented by Property Sets within the AutoCAD environment. Civil 3D enables the user to create and modify unlimited Property Sets that can be attached to CAD and design objects, enabling each object to have a great deal of information associated with it. The Survey workflows allow users to bring in unlimited attribution on points and figures coming directly from field observations.</p> <p><b>BLOCKS</b> The equivalent of a cell in MicroStation is a Block in AutoCAD. The equivalent of a cell library in MicroStation is a Block definition list. The existing cells that exist in San Diego's MicroStation cell libraries can be converted to Blocks within the AutoCAD environment. The Blocks can then be used in a similar way to the method cells are used in the MicroStation environment.</p> <p><b>IMAGERY</b> It is possible to attach imagery to a drawing file. This image can then have its transparency controlled to allow for interaction with vector graphics in the drawing file. The imagery can also be plotted to .pdf or paper by using the appropriate plot driver.</p> <p><b>MAPPING DISPLAYS</b> The Civil 3D environment provides a "Level of Display" setting that can be toggled on or off. This toggle displays items, such as surface contours, at different levels of resolution based on the view location of the user. This means that if contours were displayed at a one foot interval, the user would see all of the contours when zoomed in close. When zoomed out, however, the user may only see 10-foot contours.</p> <p><b>MODELS</b> The Civil 3D environment enables the user to define the units and coordinate system of the drawing file (.dwg) model. This is very similar to the method used by MicroStation for Models. Custom coordinate systems are supported within the Autodesk environment. All other Autodesk tools that use a coordinate system can use the same coordinate system definition. This includes the LIDAR tools, the GIS applications, and the Survey toolset.</p>
2.11	<b>Availability of Records.</b> CADD Solution must provide ability to support the City's system of record (OpenText) with accurate records.	Fully Compliant	<p>Revised: Civil 3D administrative organizations and users in system are aligned combinely to match their CADD standards. At its core, this customization is Account administrators can extract reports of usage from Autodesk Account (manage.autodesk.com).</p> <p>Under Autodesk's Premium Subscription, administrators can generate seat usage reporting to see which users have assigned products and monitor their frequency of use. With this information, admins can optimize seat assignments and purchasing decisions. Seat usage reporting is only available for products with single-user access and can only measure the activity of users connected to the internet.</p> <p>For further details please visit Seat usage reporting at <a href="https://www.autodesk.com/support/account/admin/usage/seat-usage">https://www.autodesk.com/support/account/admin/usage/seat-usage</a>.</p>
2.12	<b>License and Account Monitoring.</b> CADD Solution must provide ability to monitor the number of actions and/or named/concurrent CADD Users being used and the number of users and/or named/concurrent System Users remaining in licensed CADD Solution.	Fully Compliant	<p>Revit worksharing is a method that supports multiple departments or groups with varied workflows to work within the same project model at the same time. On many projects, team members are assigned a specific functional area to work on. Revit projects can be subdivided into worksets to accommodate such environments. You can enable worksharing to create a central model so that team members can simultaneously make design changes to a local copy of the central model.</p> <p>Learn more about Revit worksharing at <a href="https://help.autodesk.com/view/RVT/2020/ENU/?guid=GUID-0FC44807-DF06-4516-905A-4100281AC486">https://help.autodesk.com/view/RVT/2020/ENU/?guid=GUID-0FC44807-DF06-4516-905A-4100281AC486</a>.</p> <p>Using Civil 3D Data Shortcuts supports multiple departments or groups with varied workflows to work within the same project. Data shortcut provides a direct path to the location of a shareable source object. In a single operation, you can create data shortcuts for multiple objects in a source drawing. The data shortcut is used only for the creation of data references. A data reference is a read-only copy of a source object, inserted into another drawing, often called a consumer drawing. You can select a shortcut for an object and create a reference to that object in the active drawing. The data reference maintains an active link to the source object in the source drawing, without relying on the data shortcut.</p> <p>Learn more about Civil 3D Data Shortcuts at <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/how-to-create-a-data-shortcut-in-Civil-3D.html#:~:text=Create%20Data%20Shortcuts%3A%20Manage%20tab,Shortcuts%20pane%20%3E%20Create%20Data%20Shortcuts.&amp;text=Select%20the%20Civi%203D%20object,in%20the%20Toolspace%20%3E%20Prospector%20tab">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/how-to-create-a-data-shortcut-in-Civil-3D.html#:~:text=Create%20Data%20Shortcuts%3A%20Manage%20tab,Shortcuts%20pane%20%3E%20Create%20Data%20Shortcuts.&amp;text=Select%20the%20Civi%203D%20object,in%20the%20Toolspace%20%3E%20Prospector%20tab</a>.</p> <p>Civil 3D utilizes the concept of a &lt;profile&gt;.arg file. This file allows the user to identify font resources, linetypes, supporting directories, plotting methods, and several other factors that could be specific to the engineering or surveying discipline. The .arg file will automatically load the appropriate values per discipline.</p>
2.14	<b>Multiple Permissions.</b> CADD Solution must be capable of supporting multiple permissions to prevent other departments/groups from having access.	Fully Compliant	<p>With Autodesk Docs, we support multiple levels of Folder Permissions (<a href="https://help.autodesk.com/view/DOCS/ENU/?guid=Folder_Permissions">https://help.autodesk.com/view/DOCS/ENU/?guid=Folder_Permissions</a>) to control access to files and actions on the files.</p>
2.15	<b>Role Based Administration.</b> CADD Solution must offer role based administration.	Fully Compliant	<p>With Autodesk Docs, project administrators can grant specific permissions for users, roles, and companies and ensure that the right people can access the data and tools to complete projects. This entitlement administration translates directly to the desktop via the Desktop Connector.</p>

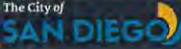
EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D				Proposer Completes <small>note: Proposers should not alter the format of this response sheet. please hover over "Solution Compliance" cell for directions. Each cell must be answered.</small>
ID	City Requirement	Solution Compliance	Proposer Comments	Proposer Comments
2.16	<p><b>Error Management.</b> CADD solution must provide ability to monitor and remediate synchronization and other errors.</p>	Fully Compliant	<p>Autodesk's Desktop Connector monitors the synchronization between a user's computer and the cloud.</p> <p>If there's a syncing error or conflict, there are automatic and manual workflows to resolve these. For full details of file and folder errors, conflicts, and projects syncing errors, see:                      BDocs - Resolve File and Folder Errors (<a href="https://help.autodesk.com/view/CONNECT/ENU/?guid=Resolve_Files_Folder_Errors_Docs">https://help.autodesk.com/view/CONNECT/ENU/?guid=Resolve_Files_Folder_Errors_Docs</a>) and                      BDocs - Resolve File and Folder Conflicts (<a href="https://help.autodesk.com/view/CONNECT/ENU/?guid=Resolve_Files_Folder_Conflicts_Docs">https://help.autodesk.com/view/CONNECT/ENU/?guid=Resolve_Files_Folder_Conflicts_Docs</a>) for more information,                      BProject Syncing Errors (<a href="https://help.autodesk.com/view/CONNECT/ENU/?guid=Add_Remove_Projects_Desktop_Connector#project-syncing-errors">https://help.autodesk.com/view/CONNECT/ENU/?guid=Add_Remove_Projects_Desktop_Connector#project-syncing-errors</a>).</p>	
2.17	<p><b>Synchronization Errors.</b> The frequency of synchronization errors on the CADD solution should be minimal.</p>	Fully Compliant	<p>Updates to the Autodesk Desktop Connector are frequently released to improve functionality and user experience. Customer-specific environments and/or project-specific conditions may cause variations in synchronization errors. To address this, Autodesk provides Troubleshooting Recommendations, along with Reporting and Diagnostic Tools for further investigation.                      BTroubleshooting - <a href="https://help.autodesk.com/view/CONNECT/ENU/?guid=Diagnostic_Logs">https://help.autodesk.com/view/CONNECT/ENU/?guid=Diagnostic_Logs</a>                      BReporting and Diagnostic Logs - <a href="https://help.autodesk.com/view/CONNECT/ENU/?guid=Diagnostic_Logs">https://help.autodesk.com/view/CONNECT/ENU/?guid=Diagnostic_Logs</a></p>	
3 Integration		Solution Compliance		
3.01	<p><b>City Business Systems Integration.</b> CADD Solution must provide ability to integrate with third party applications (including Adobe, Trimble, DAT/EM, Axiom, ESRI, etc.).</p>	Fully Compliant	<p>Civil 3D provides the ability to import and export Trimble project data via the Trimble Link Add-in. This tool is a collaborative tool built upon Trimble's APIs and that can be installed to work directly in the Civil 3D Ribbon. This tool enables import and export of Trimble data. In addition to this tool, Civil 3D provides for a direct import of attributed ESRI Shape data directly from Trimble into Civil 3D. This is accomplished via the Civil 3D SHP Import/Export Utilities tool.</p> <p>Civil 3D provides a user-definable data import/export formatting option. Using this option, it is possible to create an EM format for data entry directly into Civil 3D's survey environment.</p> <p>Autodesk has partnered with ESRI to seamlessly integrate the ability to access ESRI data from a GIS enterprise solution installed on site or an enterprise solution that is hosted in the ESRI cloud.</p> <p>This integration enables the Civil 3D users to import and export to ESRI ArcGIS Map the geometric design data, including: cogo points, alignments, parcels Feature lines, and pipe networks. By having a coordinate system defined in the Civil 3D drawing file, the Publish to ArcGIS command will publish whatever geometric data the user selects directly to the ArcGIS environment. This information can then be used in the ArcGIS environment for standard GIS workflows. Once the user is ready to pull the data back into the Civil 3D environment, the user will create a Civil 3D drawing file with the coordinate of choice. Using the Autodesk Connector for ArcGIS Online, the user can import into the active drawing the Civil 3D objects that are desired. During this process, the Civil 3D data will be translated on-the-fly to the active Civil 3D drawings coordinate system. Extended attribution on Civil geometric entities will come in as Property Sets within the Civil 3D environment. ESRI file geodatabases can be downloaded from the GIS system and used on data collectors or other mobile devices also. Civil 3D provides multiple ways to open or import existing utility information in industry-standard GIS or CADD formats. Methods are explained below.                      Connecting to GIS Source Layers:</p> <p>When utility data is stored in ArcGIS Online/Portal, the ARCGISCONNECTOR and MAPARCGISCONNECTOR commands enable the end user to log into ArcGIS Online or Portal for ArcGIS Enterprise, search data, select layers and define an area of interest to link GIS layers to a Civil 3D model.</p> <p>When using the ARCGISCONNECTOR command, the end user can bring GIS data into the Civil 3D environment as Civil 3D objects. This includes COGO Points, Structures, Gravity pipes, Feature lines and Alignments.</p> <p>When using the MAPARCGISCONNECTOR command, the end user can bring GIS data into the Civil 3D environment as FDO layers. (FDO = Feature Data Objects, which is an open-source Data Access Technology.) Using FDO layers, the end user can view both attributes &amp; geometry, and apply symbology to GIS data referenced from ArcGIS.</p>	



EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D



**Proposer Completes** *note: Proposers should not alter the format of this response sheet, please hover over "Solution Compliance" cell for directions. Each cell must be answered.*

ID City Requirement

**Solution Compliance** Proposer Comments. Proposer must describe, in detail, exactly how solution does (or does not) comply. If not fully compliant, please provide proposed workarounds, planned updates, (with timelines) or alternatives, as available (as associated costs, as applicable).

<p>3.02 <b>File Type.</b> CADD Solution must provide ability to convert for all CADD file formats such as (.dgn, .alg, .dwg, .txt and any other engineering associated CADD file format).</p>	Fully Compliant	<p>The proposed solution contains many options for importing data. This includes, but is not limited to: .dgn, .alg, .dwg, .dxf, .lisp, and LIDAR point cloud data in ASCII (ex. .txt) data file formats.</p> <p>Autodesk's Civil Engineering Data Translator: Using Civil 3D in conjunction with Autodesk's Civil Engineering Data Translator, designers can import alignments and surfaces from various formats including DTM, TIN, ALG, GPK, LandXML and other possible existing and future software. Autodesk's Civil Engineering Data Translator can convert alignments and surfaces stored in native Bentley file formats into Autodesk Civil 3D objects. The Civil Engineering Data Translator is a cloud-based application, allowing designers to process conversions with zero impact on local resources. To perform a conversion, the designer would launch the translator and select a source file. Supported formats include DTM, TIN, ALG, GPK, and DWG. Depending on the file type selected, additional import options specific to that file type are displayed to aid in the conversion process. Options include, (but are not limited to) units, breaklines, boundaries, triangles, contours, and points. After selecting import options, the file is uploaded to the cloud for processing. Once uploaded, the job monitor portion of the dialog box reports the status of the conversion. When finished, the converted data can be downloaded as a Civil 3D object (surface/alignment) stored within a DWG file. This object can then be imported, or data referenced into production drawings.</p> <p>LandXML: Alignments and/or surfaces stored as LandXML files can be imported to Civil 3D using the LandXML button found on the Insert ribbon tab. After launching the command, the user selects a LandXML file and clicks "open" to display the "Import LandXML" dialog box. This dialog box represents an organized tree listing all data found within the file. From the tree, the designer may choose one (or more) alignments and surfaces to import. Note that an "Edit Import Settings" button is also available to aid in the importation process. These optional settings include, (but are not limited to) coordinate translation, rotation, breakline creation, and alignment constraint assignment. Once imported, respective alignments and surfaces become Civil 3D objects and can be leveraged accordingly as part of an overall design.</p> <p>Other Methods: Importing Alignments/Surfaces from other possible existing and future software</p> <p>Alignments and/or surfaces currently can be stored by multiple methods with other existing software. Some of the existing other methods for surfaces import includes the following types: USGS DEM (.dem), GEOTIFF (.tif), ESRI ASCII Grid (.asc &amp; .txt), ESRI ASCII Binary Grid (.adj), multiple formats of LIDAR data, graphics data from .dgn/.dwg, and InfraWorks design data (.lmx or .sqlite). Some of the existing other methods for alignment import includes the following types: graphics data from .dgn and .dwg, and InfraWorks design data (.lmx or .sqlite). Future import methods for importing alignments and surfaces may come through the IFC file format. Autodesk is working with other software firms throughout the world to implement IFC as a common data format for moving data between future application deployments. This is somewhat like the deployment of LandXML, that exists today.</p> <p>DGN: Using the DGNIMPORT command, the contents of a DGN file can be imported into the Civil 3D environment. When importing a DGN file, several options are available including (but not limited to) model selection, units selection, reference file translation, and property mapping (layer, linetype, lineweight, color). Note that DGN import settings can be saved to a "mapping setup" file and reused on future DGNs having similar standards. After importation, DGN content is converted to AutoCAD entities and can be utilized to show content or leveraged as the basis of a new design. If only a portion of a DGN file requires import, the</p>
<p>3.03 <b>CADD Support.</b> CADD Solution must ensure applications files/ folders are housed in a secure data warehouse approved by the City.</p>	Partially Compliant	<p>Autodesk Cloud Services are hosted in Amazon Web Services (AWS). Autodesk leverages most of the AWS services suggested to mitigate impact from DDOS attacks as described in the AWS DDOS article (<a href="https://d1.awsstatic.com/whitepapers/Security/DDoS_White_Paper.pdf">https://d1.awsstatic.com/whitepapers/Security/DDoS_White_Paper.pdf</a>). AWS provides Network perimeter security services described starting in the NetworkSecurity section on page 13 of the AWS Security Overview Whitepaper (<a href="https://docs.aws.amazon.com/pdfs/whitepapers/latest/introduction-aws-security/introduction-aws-security.pdf#welcome">https://docs.aws.amazon.com/pdfs/whitepapers/latest/introduction-aws-security/introduction-aws-security.pdf#welcome</a>.)</p> <p>Autodesk mitigates the risk of integrity attacks by using encryption in transit via HTTP between the customer and the Autodesk Cloud services</p> <p>Autodesk maintains network configuration documentation for infrastructure deployed that supports Autodesk Forge. Autodesk leverages frameworks from AWS to search for attacks presented in this risk. Autodesk leverages defense in depth deployment strategies and DDOS risk mitigation solutions provided by AWS to mitigate risks.</p> <p>AWS provides boundary protections at the network level. Autodesk employs a defense-in-depth strategy that uses a combination of process, technology, and physical security controls to help secure systems and its data from unauthorized access, use, or disclosure.</p> <p>Specifically for cloud-based solutions, Autodesk's offerings are multi-tenant offerings, making it impossible to tailor maintenance scheduling to a single customer's needs.</p> <p>Autodesk's cloud-based solutions are multi-tenant offerings, making it impossible to have its secure data warehouse approved by a single customer's need.</p>
<p>3.04 <b>CADD Standards.</b> CADD Solution must ensure City CADD standards, current .</p>	Fully Compliant	<p>CADD standards could be stored in a "State Kit" for the City of San Diego. This State Kit is an installable configuration of standards that will be kept up to date by the appropriate personnel at the City. This could include all the appropriate standards used by the various departments within the City. This could even include custom coordinate systems. By maintaining a "master" State Kit, it is possible to simply roll out to the user community updates that are made to standards.</p> <p>An additional option to have users automatically get smaller updates to things like fonts, linestyles, or file locations, is to use the &lt;profile.arg&gt; functionality. This would allow the CADD Managers to change symbology in a key area and then all users would automatically see this data due to the settings within the profile.arg. Various profile.arg files could be used specifically for different disciplines.</p>

EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D



Proposer Completes (note: Proposers should not alter the format of this response sheet, please hover over "Solution Compliance" cell for directions. Each cell must be answered.)

**Solution Compliance** Proposer Comments. Proposer must describe, in detail, exactly how solution does (or does not) comply. If not fully compliant, please provide proposed workarounds, planned updates, (with timelines) or alternatives, as available (as associated costs, as applicable).

ID City Requirement

3.05 **Open API.** CADD Solution must offer an open API

Fully Compliant

The unified Autodesk Construction Cloud platform (ACC) APIs allow developers to develop apps that integrate with the ACC platform to extend its capabilities in the construction ecosystem.

Autodesk currently offers the following ACC APIs:

- The Account Admin API automates setting up projects, assigning project admins, and managing member and partner company directories. You can also synchronize data with external systems.
- The Assets API creates and manages assets in the ACC Assets service. Use it to define the settings such as categories, custom attributes, and sets of statuses that are required to define assets, and then to create and modify assets within those settings. The API offers powerful search tools to retrieve specific sets of assets and other components, and it can modify both assets and the settings that define those assets.
- The AutoSpecs API provides access to draft submittal logs that are extracted from construction project specification documents.
- The Cost Management API provides access to the data stored in the ACC Cost Management module. It enables you to manage cost and budget changes to your projects, such as accessing budget, contract, and change order information. For example, you can extract budget data to export to external systems and import the data back to the ACC Cost Management module.
- The Data Connector API retrieves data from ACC services such as Admin (both Project and Account), Issues, Locations, Submittals, Cost, and RFIs so the data can be used for local data analysis and other purposes. It works across multiple projects within an account, can set up data reporting on a regular schedule, and returns data in a format easily used by business intelligence tools.
- The Files (Document Management) API accesses, uploads, and shares 2D plans, 3D BIM models, and any other project documents to maximize collaboration. Note that the Files API is part of the Data Management API ([https://aps.autodesk.com/en/docs/data/v2/developers\\_guide/overview/](https://aps.autodesk.com/en/docs/data/v2/developers_guide/overview/)).
- The Forms API provides access to the data stored in the ACC Forms module. The Forms tool enables your team to securely fill out, review, and manage project forms.
- The Issues API creates and updates issues in your ACC projects. An issue is an item that is created in ACC for tracking, managing and communicating tasks, problems and other points of concern through to resolution. You can manage different types of issues, such as design, safety, and commissioning. We currently support issues that are associated with a project.
- The Locations API enables you to configure the hierarchy (tree) of building areas (locations) in your project. A locations tree is commonly known as a location breakdown structure (LBS). With an LBS, users can identify the location associated with each of a project's Assets, Issues, Photos, Forms, RFIs, and Submittals.
- The Model Coordination API provides full access to the set of services used by the ACC Model Coordination web application. It enables users to detect and manage the issues that arise when 3D models from different design disciplines are combined into a unified project coordination space.
- The Photos API provides access to the data stored in the ACC Photos module. The Photos tool is the single unified place to view and manage photos and

4 Technical Requirements

Solution Compliance

Proposer Comments

4.01 **Ongoing Product Usage Control.** CADD Solution must provide for ongoing product usage, such as adding new System Users, removing System User rights, and adding new machines, must be approved by the City.

Fully Compliant

Autodesk directory sync allows customers to add and maintain users from their organization's directory groups to their Autodesk team. The automated sync ensures that user details are current, that access is managed based on the enterprise user directory (Add and Remove Users) and streamlines user provisioning/product assignment within Autodesk.

SSO offers organizations the ability to secure user access by requiring employees to enter their organization's credentials instead of creating and remembering a separate Autodesk password. SSO also allows for user accounts to be created on demand and added to the correct team in Autodesk Account, providing a simple approach for building your user list and managing access.

Directory Sync however, takes this another step further by allowing administrators to define groups of users that can be synced to the organization's team in Autodesk Account. This allows users to be added to a team without requiring users to sign in or admins to manually invite them. When coupled with the new teams feature to assign products by group, this provides a user provisioning flow, where a user can be added to a group in the organization's directory, synced to a read-only group in the team in Autodesk Account and automatically assigned software access.

Learn more about Directory Sync at [https://help.autodesk.com/view/SSOGUIDE/ENU/?guid=SSOGUIDE\\_Okta\\_Guide\\_About\\_Directory\\_Sync\\_html](https://help.autodesk.com/view/SSOGUIDE/ENU/?guid=SSOGUIDE_Okta_Guide_About_Directory_Sync_html).

Directory sync also provides a clean deprovisioning process where users removed from the organization's directory will no longer have product access or be a part of the synced group.

The addition of new machines shall be approved at the discretion of the City of San Diego.

The Autodesk Solutions are used by millions worldwide. Customer feedback is collected from multiple sources, including but not limited to: User Groups, Customers, Industry Organizations, Marketing research, Educational Organizations, and in-house technology specialists. Autodesk Solutions are constantly being upgraded and updated to meet this feedback.

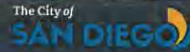
4.02 **Solution Upgrades.** CADD Solution must offer future product upgrades to meet engineering industry standards.

Fully Compliant

Autodesk periodically releases updates for desktop applications. They're available through Autodesk Account ([manage.autodesk.com](https://manage.autodesk.com/)) or the Autodesk desktop app.

Autodesk Construction Cloud update cadence varies and may be as often as bi-monthly.

**EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D**



**Proposer Completes** Note: Proposers should not alter the format of this response sheet. Please hover over "Solution Compliance" cell for directions. Each cell must be answered.

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4.03 **Upgrade Merge.** CADD Solution must support ease of merging back custom modifications into new standard.

Fully Compliant

Resetting Civil 3D to defaults is often used to resolve user-specific issues with a particular command or setting, or to rollback custom modifications to Civil 3D's default settings (I.E. the new standard). Learn more at <https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Resolving-user-specific-issues-by-resetting-Civil-3D-to-defaults.html>.  
  
When Resetting Revit back to its default user interface (i.e. the Ribbon, Quick Access Toolbar, and Project Browser) you remove any custom modifications that has been applied. Learn more at <https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/How-to-reset-the-Autodesk-Revit-ribbon-toolbar-and-browser-to-default-settings.html>.

4.04 **Usage Data.** CADD Solution must provide City ongoing access to current and legacy usage data.

Fully Compliant

Account administrators can access the teams user data through their user portal.

5 **System User Authentication**

Solution Compliance

Proposer Comments

Active Directory Sync is included with Autodesk's Premium Subscription. It supports Azure and Okta.

5.01 **Active Directory.** CADD Solution must offer integration with City's Active Directory to authenticate System Users.

Fully Compliant

Directory sync allowing administrators to define groups of users that can be synced to the organization's team in Autodesk Account. This allows users to be added to a team without requiring users to sign in or administrators to manually invite them. When coupled with the new teams feature to assign products by group, this provides a user provisioning flow, where a user can be added to a group in the organization's directory, synced to a read-only group in the team in Autodesk Account and automatically assigned software access.

Directory sync also provides a clean deprovisioning process where users removed from the organization's directory will no longer have product access or be a part of the synced group.

Autodesk Accounts is used as a single sign-on (SSO) solution for all the Autodesk SaaS Applications. Learn more about Autodesk's Security and privacy settings at <https://www.autodesk.com/support/account/manage/use/security>.

5.02 **Multi-factor Authentication.** CADD Solution must support various methods of multi-factor authentication for internal and external parties.

Fully Compliant

The application does not enforce multi-factor authentication (MFA), but customers may choose to enable multi-factor authentication. Learn more at <https://www.autodesk.com/support/account/manage/use/security>.

Customer administrators define the roles and permissions for users they grant access to within their tenant or site. MFA could be supported as part of SSO offering.

5.03 **System Administration.** CADD Solution must provide the ability for System Users to be granted access using City's existing application file formats.

Fully Compliant

Civil 3D can reference CADD industry standard file formats while maintaining primary visual fidelity between platforms. These formats include DWG, DGN, and ArcGIS. As all Industry CADD applications evolve, Autodesk works continuously to provide the best translations possible. DWG's and DGN's can be referenced using the ATTACH command or the XREF Palette. ArcGIS data can be referenced using the ARCGISCONNECTOR or MAPARCGISCONNECTOR commands to invoke Autodesk's connector for ArcGIS utility.

Autodesk Construction Cloud (ACC) supports many file formats. Learn more about Supported File Formats within ACC at [https://help.autodesk.com/view/DOCS/ENU/?guid=Supported\\_Files\\_Docs](https://help.autodesk.com/view/DOCS/ENU/?guid=Supported_Files_Docs).

Specialized City data sources that may contain Imagery and GIS data can be connected to the Civil 3D environment using Civil 3D's Mapping connector options, as shown below.

The screenshot shows a software interface for configuring data connections. On the left, under 'Data Connections by Provider', there is a list of options including 'Add ArcGIS Connection', 'Add ArcGIS Online Connection', 'Add Enterprise Industry Model C', 'Add FGD8 Connection', 'Add MySQL Connection', 'Add ODBC Connection', 'Add Oracle Connection', 'Add PostgreSQL Connection', 'Add Raster Image or Surface Co', 'Add SDF Connection', 'Add SAP Connection', 'Add SQL Server Spatial Connect', 'Add SQLite Connection', 'Add WFS Connection', 'Add WMS Connection', and 'Add WMTS Connection'. On the right, the 'OSGeo FDO Provider for WMS' configuration window is open, showing an 'Add a New Connection' button and a 'Read access to OGC WMS-based data store.' section. Below this, there are input fields for 'Connection name:' (with 'WMS\_1' entered), 'Server name or URL:', 'Version:' (with 'Default version' selected), and a 'Show proxy settings' checkbox.

Third parties may access the solution under certain circumstances.

5.04 **External Sharing.** CADD Solution must provide the ability to allow third parties to use the solution under certain circumstances.

Fully Compliant

The external sharing of CADD solutions with third parties can be accomplished by simply adding the third party to a Cloud-based Project. This will allow them to access whatever data that the client deems necessary.

It is also possible to create "Shared Views" of design data, which can be viewed on mobile devices or desktops by whomsoever gets the invite to view the data. This can be a good way to provide a look into a project for a large-scale group that may not even know the applications but can view the 3D model with no training.


EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D			
ID	City Requirement	Proposer Completes	<small>Note: Proposers should not alter the format of this response sheet. Please hover over "Solution Compliance" cell for directions. Each cell must be answered.</small> <small>Proposer Comments: Proposer must describe, in detail, exactly how solution does (or does not) comply. If not fully compliant, please provide proposed workarounds, planned updates, (with timelines) or alternatives, as available (as associated costs, as applicable).</small>
5.05	<b>Branding.</b> CADD Solution must provide the ability to sheet creation to users and may include a City seal/stamp/image/logo.	Fully Compliant	<p>Autodesk Revit supports sheet creation, which may include a City seal, stamp, image, or logo. Learn more on how to Create a Title block in Revit at <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=GUID-B6687C649-67F0-4616-ABBC-05BD127DC5BA">https://help.autodesk.com/view/RVT/2023/ENU/?guid=GUID-B6687C649-67F0-4616-ABBC-05BD127DC5BA</a>.</p> <p>AutoCAD Civil 3D support sheet creating which may include a City seal, stamp, image, or logo. Sample title blocks are available to download and customize at <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Where-to-find-title-block-templates.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Where-to-find-title-block-templates.html</a>.</p> <p>Civil 3D can add plan sheet borders and auto-populate certain content and plan sheet information. (e.g., symbology settings, sheet numbers, scale, file references, name, etc.)</p> <p>Civil 3D can manage as well as automate the creation of plan sheets by invoking the Sheet Set Manager tool. Using sheet sets, the end user can add plan sheet borders and auto-populate certain content and plan sheet information. This includes but is not limited to sheet numbers, scale, file references, name, plot date, folder location, and author.</p> <p>Plan Sheet Creation: As a project evolves, end users can create plan sheets, including general notes, details, specifications, exhibits, plan &amp; profiles, cross sections, cover sheets etc. A complete collection of these plan sheets can be organized into a "sheet set". Sheet sets allow for the global control of title block data, including but not limited to sheet names, sheet numbers, and project / stakeholder information. This is possible because the Sheet set tool automatically fills out and manages title block information.</p> <p>This data may then be extracted into a schedule of drawings that can be updated if changes are made to the plan set. It is important to note that all annotations used in the construction drawings are associated with the drawing scale; if the scale of the drawing changes, the annotations can update automatically. This means objects need only be annotated once, and those labels, dimensions, and callouts can then be displayed at multiple scales.</p> <p>Creating a Sheet Set: A Sheet Set is used to manage a collection of plan sheets associated with a project. Using the Sheet Set Manager, an entire collection of plan sheets can be navigated, renumbered, batch printed, or archived. The Sheet Set can also manage title block annotation common to all sheets. These annotations might include project name and number, project date, submittal stage, client data, or revision notes.</p> <p>Sheet sets are created using the "New Sheet Set" option within the Sheet Set Manager palette. After a sheet set has been defined, existing layouts can be</p>
<b>6 Technical Documentation</b>			
6.01	CADD documentation, must document completely with clear reference to configuration files, folders, version, etc.	Fully Compliant	<p>Civil 3D and Revit both provide extensive online reference guides to configuration files, folders, version, etc.</p> <p>• Civil 3D Online Help - <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/">https://help.autodesk.com/view/CIV3D/2023/ENU/</a>                  • Revit Online Help - <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html">https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html</a></p> <p>Civil 3D and Revit both provide extensive online reference guides to support CADD solution performance and functionality concerns.</p> <p>• Civil 3D Online Help - <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/">https://help.autodesk.com/view/CIV3D/2023/ENU/</a>                  • Revit Online Help - <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html">https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html</a></p> <p>If additional resources are required, customers are encouraged to contact U.S. CAD Technical Support and they will be provided more specific guidance on available resources to the City as needed.</p>
6.02	<b>Support.</b> Technical reference manuals must be available to allow City's CADD Staff to address solution performance and functionality concerns.	Fully Compliant	<p>Civil 3D and Revit both provide extensive online reference guides to support CADD Standards customization, template development, feature class creation, and for any other user defined functionality.</p> <p>Please refer to the following help articles for additional information:                  • Civil 3D Online Help - <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/">https://help.autodesk.com/view/CIV3D/2023/ENU/</a>                  • Revit Online Help - <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html">https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html</a>                  • Civil 3D Developer's Guide - <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=GUID-DA303320-B66D-4F4F-AA4F-9FBEC075AE0">https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=GUID-DA303320-B66D-4F4F-AA4F-9FBEC075AE0</a>                  • Revit Developer's Guide - <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=Revit_API_Revit_API_Developers_Guide_html">https://help.autodesk.com/view/RVT/2023/ENU/?guid=Revit_API_Revit_API_Developers_Guide_html</a></p>
6.03	<b>User Guides.</b> Reference guides must be available to support CADD Standards customization, template/ cell development, feature class creation and for any other user defined functionality for cell libraries.	Fully Compliant	<p>Civil 3D and Revit both provide extensive online reference guides for all command-line, GUI and configuration options.</p> <p>Please refer to the following help articles for additional information:                  • Civil 3D Online Help - <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/">https://help.autodesk.com/view/CIV3D/2023/ENU/</a>                  • Revit Online Help - <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html">https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html</a>                  • Civil 3D Developer's Guide - <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=GUID-DA303320-B66D-4F4F-AA4F-9FBEC075AE0">https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=GUID-DA303320-B66D-4F4F-AA4F-9FBEC075AE0</a>                  • Revit Developer's Guide - <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=Revit_API_Revit_API_Developers_Guide_html">https://help.autodesk.com/view/RVT/2023/ENU/?guid=Revit_API_Revit_API_Developers_Guide_html</a></p>
6.04	<b>CADD Coding.</b> Reference guides are provided for all command-line, GUI and CADD configuration options.	Fully Compliant	<p>Civil 3D and Revit both provide extensive online reference guides for all command-line, GUI and configuration options.</p> <p>Please refer to the following help articles for additional information:                  • Civil 3D Online Help - <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/">https://help.autodesk.com/view/CIV3D/2023/ENU/</a>                  • Revit Online Help - <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html">https://help.autodesk.com/view/RVT/2023/ENU/?guid=RevitReleaseNotes_2023release_html</a>                  • Civil 3D Developer's Guide - <a href="https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=GUID-DA303320-B66D-4F4F-AA4F-9FBEC075AE0">https://help.autodesk.com/view/CIV3D/2023/ENU/?guid=GUID-DA303320-B66D-4F4F-AA4F-9FBEC075AE0</a>                  • Revit Developer's Guide - <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=Revit_API_Revit_API_Developers_Guide_html">https://help.autodesk.com/view/RVT/2023/ENU/?guid=Revit_API_Revit_API_Developers_Guide_html</a></p>



EXHIBIT E: Functional Requirements - Response Template - ADDENDUM D		The City of SAN DIEGO	
ID	City Requirement	Proposer Completes	Proposer Comments
6.08	Storage. CADD Data folders/ files can be checked in & out, versioning capabilities, date/ time stamps, searchable and includes permissioning / access rights functions .	Fully Compliant	<p>Using Autodesk Construction Cloud, a version history is recorded of all file changes. A history is logged of every save of a design file. A detailed account of the history of the document is logged. From this history, you can see the current version, set current any version of a drawing (roll back), see who uploaded the documents and when the modifications were made. You can copy, download or make current any version in the history. You can compare two versions of the file to see what's changed from version to version. In addition, the Drawing History command allows you to view the version history of drawings stored in the cloud in the new Drawing History palette, where you can compare them with the current version of your drawing.</p> <p>When working on Civil 3D drawings in the Autodesk Construction Cloud, files are automatically locked using the Desktop Connector. When a member opens a file, it will automatically lock to prevent other members from making conflicting modifications to the same file. If a member opens a file which is locked by someone else, they will only be able to view the file in read-only mode. Learn more about File Locking in Autodesk Docs. Learn more at <a href="https://help.autodesk.com/view/CONNECT/ENU/?guid=File_Locking_Docs_Connector">https://help.autodesk.com/view/CONNECT/ENU/?guid=File_Locking_Docs_Connector</a></p> <p>When working on workshare-enabled Revit models in the Autodesk Construction Cloud, you can edit individual elements, or you can edit worksets. When you check out an individual element or a whole workset, the elements are visible to other users but are not editable by them until you relinquish the element or workset. Learn more about Revit Worksets. Learn more at <a href="https://help.autodesk.com/view/RVT/2023/ENU/?guid=GUID-FAA51E3-7703-1965-B09E-E61A92CDE5A">https://help.autodesk.com/view/RVT/2023/ENU/?guid=GUID-FAA51E3-7703-1965-B09E-E61A92CDE5A</a></p> <p>Folder permissions within the Autodesk Construction Cloud can control access to files and actions on the files. Project administrators can provide increased permissions to members to allow for actions such as downloading, uploading, or editing files, and publishing markups. Project administrators have Manage permissions to all folders. Subfolders automatically inherit the permission level of the parent folder, but can be changed later. If changed, subfolder permissions must either match or have a greater access level of the parent folder.</p> <p>Autodesk Construction Cloud allows you to search and filter in the Files tool to easily find folders and files you have permission to view.</p>
7	Vendor Support	Solution Compliance	Proposer Comments
7.01	Structure. Vendor must have a structured support network available for issues that cannot be resolved by the City.	Fully Compliant	<p>Both Autodesk and U.S. CAD provide technical support with an escalation process. This includes web-based support, telephone support, and access to a ticket tracking system. The Team agrees to enter an initial maintenance and support period immediately following implementing the solution(s) and acceptance by the City of San Diego (City). The Team understands the need for the City to provide timely and comprehensive Maintenance and Support capabilities for its end-users. Autodesk software solutions include many CDTS capabilities to assist with this effort and help keep teams productive and reduce downtime.</p> <p>As a part of the purchase of Autodesk AEC Collection software, both Autodesk and U.S.CAD provide a base-level of software technical support. This includes web-based support, telephone support, and access to a ticket tracking system. This base-level technical support is included at no additional cost to the City and is active for the duration of the agreement, including the initial period immediately following implementation of the solutions.</p> <p>U.S.CAD uses a ticketing system (support ticket system) which is a help desk software that collects and tracks all customer support interactions from various channels—phone, chat, email, website, and personalized user portal. No matter how a customer reaches the U.S.CAD support team, that interaction will be logged in the system. This system is an omnichannel ticketing system that makes it easy for U.S.CAD to track, prioritize, and solve end user support tickets. It allows both the support agent and the end user the ability to access and manage all information from one centralized hub, giving all parties a full view of a ticket's status, regardless of where it originated.</p> <p>U.S.CAD support agents have full details about every user they interact with through an organized workflow. This information can include (but not limited to) email address, phone number, physical address, time zone, department, title etc. Equipped with context about every user, support agents can quickly resolve individual support requests and provide quality customer experience across the board.</p> <p>Incoming tickets are assigned a unique reference number and status to help the U.S.CAD support team manage and prioritize their workflow. To stay on track, the system administrator has set up alerts for tickets that agents have not responded to in a timely manner. This helps in identifying problems early, so administrators can act swiftly to ensure customer satisfaction is not interrupted.</p> <p>U.S.CAD also uses the data housed in the support ticket system to provide the City with a real time, interactive dashboard. This dashboard helps both U.S.CAD and the City identify the most critical reasons users are getting in contact with the technical support team. And with that, helps build a roadmap of potential improvements from both operations and product perspective. Included on this dashboard are details on the number of tickets open and solved, tickets created by time period, ticket response time, time to close, tickets by product, ticket detail and user satisfaction results, just to name a few. The U.S.CAD team will work with the City administrators to customize this dashboard to show specific information requested by the City.</p> <p>Another useful feature that integrates seamlessly with this support ticketing system is a personalized knowledge-base platform that allows the City users to search for answers to frequently asked questions, view their previously submitted tickets and the resolutions to those tickets, and access City specific support information that may be currently difficult to locate. This platform provides the City users a self-service credentialed portal where answers to questions can be quickly located without the need to submit a support ticket, thus reducing the downtime common technical problems currently cause. If a resolution to the issue cannot be found, the user can submit a ticket directly to U.S.CAD from the technical support agents via this portal. The lifecycle of this ticket can also be tracked via this portal.</p>

EXHIBIT F: Interrogatories - Response & References Template		Proposer Completes <small>(note: Proposers should not alter the format of this response sheet)</small>	The City of <b>SAN DIEGO</b>
ID	City Question	Proposer Response	PROPOSER (ORGANIZATION) NAME HERE
1	<b>Experience</b>		
1.01	<p>Provide an overview of the maturity of the CADD Solution, inclusive of:</p> <ul style="list-style-type: none"> <li>a. Number of active paying commercial customers for the Solution</li> <li>b. Description of age and maturity of the Solution</li> <li>c. Description of update cycle for Solution</li> <li>d. Any relevant future enhancements or innovations for Solution</li> <li>e. Number of successful implementations completed within the last three years (by your organization or your proposed sub-contractor).</li> </ul>	<ul style="list-style-type: none"> <li>a. Over 100 Million users of Autodesk software worldwide and over 200k commercial customers.</li> <li>b. AutoCAD has been active in the market for over 40 years, Revit for 23 years, Civil 3D 18 years, Autodesk BIM Collaborate Pro and Autodesk Build 8 years.</li> <li>c. Autodesk solutions are used by millions worldwide. Customer feedback is collected from multiple sources, including but not limited to User Groups, Customers, Industry Organizations, Marketing research, Educational Organizations, and in-house technical specialists. Autodesk Solutions are constantly being upgraded and updated to meet this feedback</li> <li>d. Autodesk is working on the release of Forma, Autodesk's architecture, engineering, construction and operations industry cloud that will unify workflows across teams that design, build, and operate the built environment, allowing data to flow fluidly, so the right details get to the right people. Forma will expand our vision to the entire AECO ecosystem, to bridge software, processes, and teams and ultimately deliver better projects.</li> <li>e. Autodesk does not have an exact number for this, but it's in the thousands worldwide.</li> </ul>	
1.02	<p><b>Reference 1</b> Provide a reference for your CADD solution (from the last three years), inclusive of:</p> <ul style="list-style-type: none"> <li>a. Number of active paying commercial customers for the solution</li> <li>b. Company name</li> <li>c. Contact name and role</li> <li>d. Contact details (email, phone)</li> <li>e. Location</li> <li>f. Deployment size</li> <li>g. Description of the deployment (where possible, provide examples of clients of similar size/environment/sector to the City of San Diego). If you intend to sub-contract the implementation services, please provide the above details for both your own organization, and the sub-contractor.</li> </ul>	<p>Provide a reference for your CADD solution (from the last three years), inclusive of:</p> <ul style="list-style-type: none"> <li>a. Over 100 Million users of Autodesk software worldwide and over 200k commercial customers.</li> <li>b. Company name: Montana Department of Transportation</li> <li>c. Contact name and role: Dwane Kailey Chief Operating Officer</li> <li>d. Contact details (email, phone): dkailey@mt.gov (406)444-6414</li> <li>e. Location: State of Montana</li> <li>f. Deployment size: 500 users</li> <li>g. Description of the deployment (where possible, provide examples of clients of similar size/environment/sector to the City of San Diego). If you intend to sub-contract the implementation services, please provide the above details for both your own organization, and the sub-contractor.</li> </ul> <p>MDT transitioned to Autodesk Infrastructure Design Solutions and moved off of Bentley Systems. MDT uses Autodesk infrastructure solutions for state-wide, transportation-related 3D design and modeling, including conceptual design, visualization, drainage and bridge design and analysis, survey data management processing, geotechnical, and right-of-way mapping. With Autodesk's infrastructure solutions, project teams and stakeholders achieve streamlined collaboration leading to more efficient project outcomes. The decision to move to Autodesk was part of MDT's forward-thinking Digital Delivery Initiative and ongoing mission to provide excellence in transportation to the traveling public.</p> <p>The organizations that delivered services as summarized above were:</p> <ul style="list-style-type: none"> <li>DLT: Prime and Contract Administration and Invoicing</li> <li>Autodesk: Software manufacturer – supplied software applications.</li> <li>U.S. CAD: Implementation, Training, and Consulting Services, content development</li> </ul>	
1.03	<p><b>Reference 2</b> Provide a reference for your CADD solution (from the last three years), inclusive of:</p> <ul style="list-style-type: none"> <li>a. Number of active paying commercial customers for the solution</li> <li>b. Company name</li> <li>c. Contact name and role</li> <li>d. Contact details (email, phone)</li> <li>e. Location</li> <li>f. Deployment size</li> <li>g. Description of the deployment (where possible, provide examples of clients of similar size/environment/sector to the City of San Diego). If you intend to sub-contract the implementation services, please provide the above details for both your own organization, and the sub-contractor.</li> </ul>	<p>Provide a reference for your CADD solution (from the last three years), inclusive of:</p> <ul style="list-style-type: none"> <li>a. Over 100 Million users of Autodesk software worldwide and over 200k commercial customers.</li> <li>b. Company name Riverside County Flood Control</li> <li>c. Contact name and role Simon Tse, P.E., Engineering Project Manager</li> <li>d. Contact details (email, phone) stse@rivco.org (951)955-1205</li> <li>e. Location Riverside, CA</li> <li>f. Deployment size: 63 users</li> <li>g. Description of the deployment (where possible, provide examples of clients of similar size/environment/sector to the City of San Diego). If you intend to sub-contract the implementation services, please provide the above details for both your own organization, and the sub-contractor.</li> </ul> <p>RCFC was interested in moving from their currently Bentley platform to Autodesk, Civil 3D. The outcome of this decision by RCFC was in part to update their standards while at the same time looking for the development of new and modern engineering workflows. This migration impacts the RCFC Design and Construction teams, with approximately 60+ users.</p> <p>The organizations that delivered services as summarized above were:</p> <ul style="list-style-type: none"> <li>DLT: Prime and Contract Administration and Invoicing</li> <li>Autodesk: Software manufacturer – supplied software applications.</li> <li>U.S. CAD: Implementation, Training, and Consulting Services, content development</li> </ul>	

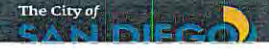
EXHIBIT F: Interrogatories - Response & References Template		Proposer Completes <small>(note: Proposers should not alter the format of this response sheet)</small>	The City of <b>SAN DIEGO</b>
ID	City Question	Proposer Response	
	<p><b>Reference 3</b> Provide a reference for your CADD solution (from the last three years), inclusive of:</p> <ol style="list-style-type: none"> <li>Number of active paying commercial customers for the solution</li> <li>Company name</li> <li>Contact name and role</li> <li>Contact details (email, phone)</li> <li>Location</li> <li>Deployment size</li> <li>Description of the deployment (where possible, provide examples of clients of similar size/environment/sector to the City of San Diego). If you intend to sub-contract the implementation services, please provide the above details for both your own organization, and the sub-contractor.</li> </ol>	<p>Provide a reference for your CADD solution (from the last three years), inclusive of:</p> <ol style="list-style-type: none"> <li>Over 100 Million users of Autodesk software worldwide and over 200k commercial customers.</li> <li>Company name: Federal Aviation Authority</li> <li>Contact name and role: Amber Natale – Corporate Tools – Manager</li> <li>Contact details (email, phone): amber.natale@faa.gov (817) 222-5660</li> <li>Location Remote Delivery: Nation-wide (El Segundo, CA)</li> <li>Deployment size: +/- 200 users</li> <li>Description of the deployment (where possible, provide examples of clients of similar size/environment/sector to the City of San Diego). If you intend to sub-contract the implementation services, please provide the above details for both your own organization, and the sub-contractor.</li> </ol> <p>The Federal Aviation Authority (FAA) is transitioning from MicroStation to AutoCAD and U.S. CAD has been enlisted to provide guidance in the development of an implementation and training plan. U.S. CAD has provided the FAA with discovery efforts to identify the workflows roadmaps that will provide its end-users, IT, and management with direction on the appropriate Autodesk software solutions to be included in their adoption of Autodesk solutions. U.S. CAD is providing the configuration and customization of the Autodesk solution to assist the end-users in a successful transition from Bentley to Autodesk with minimal disruption and production loss while developing enhanced workflows to provide the FAA with new efficiency gains possible within the Autodesk solution.</p> <p>The organizations that delivered services as summarized above were:</p> <ul style="list-style-type: none"> <li>U.S. CAD: Implementation, Training, and Consulting Services, content development</li> <li>Autodesk: Software manufacturer – supplied software applications.</li> </ul>	
<b>2 Implementation, Planning &amp; Training</b>			
2.01	<p>Provide a project plan for a milestone-based fixed-price delivery of the implementation services to 325 CADD Users, across four City departments. Include the following:</p> <ol style="list-style-type: none"> <li>High level project plan (Microsoft Project Gantt chart, or equivalent);</li> <li>Explanation of the roles of the proposed project team;</li> <li>Explanation of the role of the City (including time commitments);</li> <li>Description of a recommended team structure including City and Implementor staffing;</li> <li>List of key personnel functions, staffing profiles and responsibilities to cover the implementation, training and technical support; and</li> <li>High level explanation of how you plan to successfully implement the CADD Solution requirements</li> </ol> <p>Proposers should assume a minimum baseline of onsite implementation hours will be required for their implementation plans.</p> <p>Provide a brief proposed plan for implementing the proposed CADD Solution for the City of San Diego.</p> <ol style="list-style-type: none"> <li>The required tasks to implement the software per department;</li> <li>Resource recommendations and roles for City and Proposer personnel;</li> <li>Technical requirements for testing, training and production environments, including equipment, as appropriate; and</li> <li>Implementation/Onboarding: Document/form template creation, development of use case roadmaps, advise on best practices, administering the CADD Solution, creation of custom workflows, configuring CADD Standards, customizations and establishing SSO.</li> </ol> <p>Provide a brief project plan for implementing the proposed CADD solution for two common processes within a City department.</p> <ol style="list-style-type: none"> <li>The required tasks to convert the manual process described to a digital process;</li> <li>How long it would take to implement the solution;</li> <li>Technical and/or software requirements required for all parties to use the solution (e.g. potential software an end user would need to acquire to use the solution).</li> </ol>	<p>Exhibit F 2.01. pdf</p>	
2.02	<ol style="list-style-type: none"> <li>Technical requirements for testing, training and production environments, including equipment, as appropriate; and</li> <li>Implementation/Onboarding: Document/form template creation, development of use case roadmaps, advise on best practices, administering the CADD Solution, creation of custom workflows, configuring CADD Standards, customizations and establishing SSO.</li> </ol>	<p>Exhibit F 2.02. pdf</p>	
2.03	<ol style="list-style-type: none"> <li>The required tasks to convert the manual process described to a digital process;</li> <li>How long it would take to implement the solution;</li> <li>Technical and/or software requirements required for all parties to use the solution (e.g. potential software an end user would need to acquire to use the solution).</li> </ol>	<p>Exhibit F 2.03. pdf</p>	



EXHIBIT F: Interrogatories - Response & References Template		Proposer Completes <small>(note: Proposers should not alter the format of this response sheet)</small>
ID	City Question	Proposer Response
	<p>Provide a brief proposed plan for providing City staff with training in the operation and maintenance of the proposed CADD Solution, including application functions, hardware use, and any procedures that are unique to a particular job function.</p> <p>A detailed training plan for selected City staff must be developed and implemented for the operation of all application modules and processing functions prior to implementation.</p>	
2.04	<p>Application manuals and procedures manuals must be provided to the City in an electronic format. The manuals must be routinely updated as policies or programs are changed. Provide details on how training may be delivered either on-site or virtually (if needed).</p> <p>Training will begin no later than thirty (30) calendar days after the proposed CADD Solution is installed and accepted by the City. If the Go-live date is significantly delayed due to the Proposer actions or faults, any repeat training sessions as determined by the City must be performed at no cost to the City.</p>	Exhibit F 2.04. pdf
<b>3 Licensing</b>		
3.01	<p>Explain clearly your proposed licensing model for the CADD solution. Ensure you cover all potential chargeable costs, and include all details pertinent to:</p> <ol style="list-style-type: none"> <li>Upgrades and Versions</li> <li>Permissioning &amp; Check-in &amp; out metrics</li> <li>Sandboxing and dev/test licensing</li> <li>Describe what limits and additional costs (if any) might apply for bandwidth usage on transporting City data</li> <li>Under what circumstances the City may be exposed to additional coverage costs</li> </ol>	<p>The offer is made out of a combination of Cloud Based SaaS Solution and Desktop Solution. Autodesk considers the desktop solution (we assume that with Off-Premises - Hosted the City refers to the Desktop solution). The products are priced according to a regular flat rate that is not expected to change, unless the City wished for a change of the offering. The offer is valid for 5 years (see Exhibit D).</p> <ol style="list-style-type: none"> <li>Upgrades and Versions Autodesk periodically releases updates for desktop applications. They're available through Autodesk Account (manage.autodesk.com) or the Autodesk desktop app. Autodesk Construction Cloud update cadence varies and may be as often as bi-monthly.</li> <li>Permissioning &amp; Check-in &amp; out metrics With Autodesk Docs, we support multiple levels of Folder Permissions (<a href="https://help.autodesk.com/view/DOCS/ENU/?guid=Folder_Permissions">https://help.autodesk.com/view/DOCS/ENU/?guid=Folder_Permissions</a>) to control access to files and actions on the files.</li> <li>Auto-file locking / unlocking is supported for certain design file types (e.g. DWG). It is also a setting within the Sheet Set to enable or disable auto-locking / unlocking. Permission to utilize the Off-Premises (Hosted) Solution (desktop software) can be managed from the admin portal; manage.autodesk.com. Premium customer can utilize Active Directory Sync which allow for auto permissioning of users based on groups/ departments already established within the City's network.</li> <li>Sandboxing and dev/test licensing Autodesk Construction Cloud allows setting up separate projects for test and development. Your team can limit these projects to the Individuals about to set up and join the projects. This keeps the test and development projects completely separate from the production project without requiring a completely separate instance on the system.</li> <li>Describe what limits and additional costs (if any) might apply for bandwidth usage on transporting City data</li> </ol>
<b>4 City Tech Alignment</b>		
4.01	<p>Will the Proposer or application need access to the City's internal systems to do development or for operational use of the new system?</p>	<p>No, Civil 3D and Revit will not need to access the City's internal systems to do development or for operational use. System requirements for Civil 3D and Revit can be found in the links below.</p> <p>Civil 3D system requirements: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a>                      Revit system requirements: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html</a></p> <p>Specific URLs or protocols for Autodesk subscription licensing to pass through a firewall or proxy system and operate correctly can be found in the following link. <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/What-URLs-protocols-should-be-accessible-for-Desktop-Subscription-to-work.html.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/What-URLs-protocols-should-be-accessible-for-Desktop-Subscription-to-work.html.html</a></p>
4.02	<p>Will the Solution require any connections to systems outside of the City's firewall?</p>	Yes

EXHIBIT F: Interrogatories - Response & References Template		Proposer Completes <small>(note: Proposers should not alter the format of this response sheet)</small>
ID	City Question	Proposer Response
4.03	As the Solution is hosted outside of the City's internal network, does the application need a connection inside of the City's firewall?	The following AKN article lists the URLs and configurations needed for the Autodesk subscription licensing to pass through a firewall or proxy system and operate correctly. <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/What-URLs-protocols-should-be-accessible-for-Desktop-Subscription-to-work.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/What-URLs-protocols-should-be-accessible-for-Desktop-Subscription-to-work.html</a>
4.04	Will LDAP/SAML need to traverse the entire directory and have access to our entire AD, or is there a particular group or user accounts we can specify that the Proposer's SAML needs to see?	Information about Autodesk's SSO service is available here: <a href="https://help.autodesk.com/view/SOAGUIDE/ENU/?guid=SSOAGUIDE_Okta_Guide_About_Single_Sign_on_SSO_html">https://help.autodesk.com/view/SOAGUIDE/ENU/?guid=SSOAGUIDE_Okta_Guide_About_Single_Sign_on_SSO_html</a>
4.05	How many IP's will the Proposer require for both the outbound connections and authentication to the app via the City's LDAP? (there are typically IP's identified by the vendor as the IP's that point to the externally hosted application).	Information about Autodesk's SSO service is available here: <a href="https://help.autodesk.com/view/SOAGUIDE/ENU/?guid=SSOAGUIDE_Okta_Guide_About_Single_Sign_on_SSO_html">https://help.autodesk.com/view/SOAGUIDE/ENU/?guid=SSOAGUIDE_Okta_Guide_About_Single_Sign_on_SSO_html</a>
4.06	Does access to the application need to be restricted inside the City network to certain IP addresses or subnets?	Information is available here: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/What-IP-addresses-URLs-URLs-and-domains-are-used-for-Autodesk-Construction-Cloud-services.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/What-IP-addresses-URLs-URLs-and-domains-are-used-for-Autodesk-Construction-Cloud-services.html</a>
4.07	What is the OS, DB, and App language and which version (Windows SQL server preferred. Only SQL Server and Oracle are supported as on premises solutions at the City)?	Autodesk integrates security with a software development lifecycle (SDLC) method which is based on industry best practices and involves threat modeling, static code analysis, third-party component analysis, dynamic testing and penetration testing. OWASP Top 10 and SANS Top 25 frameworks are leveraged in the SDLC method. Autodesk's SDLC is aligned with the BSIMM (Building Security In Maturity Model) industry standard framework. You can learn more about our security practices at the Trust Center: <a href="https://www.autodesk.com/trust/security">https://www.autodesk.com/trust/security</a> .
4.08	What restrictions (if any) will be placed on the City's third party Applications Maintenance provider in terms of accessing the Solution to make changes to the configuration for enhancements on behalf of the City?	We understand that the mention of "configuration for enhancements" in this section are related to the way in which the City anticipates deployment to end-users and not the configuration for enhancement to the Autodesk products directly. Based on this assumption, and the information provided in the RFP, we do not foresee any restrictions being placed on the City's third party Applications Maintenance provider. However, we request that any configurations for enhancement by either party related to the proposed products should be coordinated with the team in advance.
4.09	Please describe how will the system be kept current with patches and upgrades?	Available integrations can be found here: <a href="https://construction.autodesk.com/workflows/construction-software-integrations/">https://construction.autodesk.com/workflows/construction-software-integrations/</a>
4.10	What is the architecture of the application?	This information is trade-secret and confidential. See Appendix D: Security Letter from Autodesk.
4.11	Does the system integrate to any standard desktop applications, and if so, what versions?	Available integrations can be found here: <a href="https://construction.autodesk.com/workflows/construction-software-integrations/">https://construction.autodesk.com/workflows/construction-software-integrations/</a>
4.12	What software (if any) is required on a City desktop?	AEC desktop product are compatible with most business-class machines so long as they adhere to, or exceed, the minimum system requirements. Below are the system requirements for select AEC product for reference: AutoCAD: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html</a> Autodesk Civil 3D: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a> Autodesk Revit: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html</a> Autodesk BIM Collaborate Pro is an entirely cloud based system for online collaboration and data management. No component of the solution needs to be installed on the local client machines. This significantly reduces the time and effort needed to have contributors' access to the solution. Further details on the Autodesk Construction Cloud system requirements please visit <a href="https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC">https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC</a>
4.13	Are there any desktop components required to be installed?	AEC desktop product are compatible with most business-class machines so long as they adhere to, or exceed, the minimum system requirements. Below are the system requirements for select AEC product for reference: AutoCAD: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html</a> Autodesk Civil 3D: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a> Autodesk Revit: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html</a> Autodesk BIM Collaborate Pro is an entirely cloud based system for online collaboration and data management. No component of the solution needs to be installed on the local client machines. This significantly reduces the time and effort needed to have contributors' access to the solution. Further details on the Autodesk Construction Cloud system requirements please visit <a href="https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC">https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC</a>
4.14	If the solution is to be linked or jumped off from the City's website, then what is the domain name/URL going to be and whose responsibility is it to get it?	Not applicable
4.15	Is the hosting component expected to be sub-contracted to a provider? If so, who?	Yes, we use AWS

EXHIBIT F: Interrogatories - Response & References Template		Proposer Completes <small>(note: Proposers should not alter the format of this response sheet)</small>
ID	City Question	Proposer Response
4.16	Where are the hosting sites located?	<p>Covered Content is primarily stored in the US. For data storage, Autodesk leverages Amazon Web Services (AWS) that has access to data stored within the AWS infrastructure and safeguards that data according to AWS security and operations policies and practices as can be seen at <a href="https://aws.amazon.com/security">https://aws.amazon.com/security</a> and <a href="https://aws.amazon.com/compliance">https://aws.amazon.com/compliance</a>.</p> <p>"Covered Content" means any files, designs, models, data sets, images, documents or similar materials submitted or uploaded to our services by users, together with the specific output generated from the use of such services based on the user's own raw data or information. It also includes the associated metadata of the project file that is not binary or in the design object itself, for example, personal data (e.g., author name, emails), time stamp and activity stream.</p>
4.17	Where are backup sites located?	<p>Customer data is replicated between data centers in separate locations.</p> <p>Autodesk Cloud services are hosted on Amazon Web Services (AWS) in accounts owned and managed by Autodesk. AWS has access to data stored within the AWS infrastructure and safeguards that data according to AWS security and operations policies and practices as can be seen at <a href="https://aws.amazon.com/security">https://aws.amazon.com/security</a> and <a href="https://aws.amazon.com/compliance">https://aws.amazon.com/compliance</a>.</p>
4.18	Would City data be made available for use or access by a third party? Please describe to what extent.	<p>For information on how Autodesk shares customer personal data with third parties to provide the services, please see our Terms of Use: <a href="https://www.autodesk.com/company/terms-of-use/en/general-terms">https://www.autodesk.com/company/terms-of-use/en/general-terms</a> and Privacy Statement: <a href="https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement">https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement</a></p>



City of San Diego

IT Mandatory Requirements Rev. 2022.10.5

ID	City Requirement	Level of Compliance	Proposer Response. Please describe, in detail, how solution does (or does not) comply. If not fully compliant, please provide proposed workarounds, planned updates (with timelines), or alternatives, as available (and associated costs, as applicable).
1	<b>Application Security</b>		
	The following Application Security requirements shall apply:		
1.1	<b>System User Authentication.</b> Web authentication must be aware and ready (or configurable with) Security Assertion Markup Language (SAML) and Application must ensure user session automatically logs out upon twenty (20) minutes of user inactivity.	Partially Compliant	<p>Credentials consisting of user ID and password are required to access Autodesk Services. User can access the system by registering an Autodesk ID which is linked to their license.</p> <p>Single Sign On enables users to sign in to Autodesk services with your enterprise credentials.</p> <p>Autodesk SSO uses the Security Assertion Markup Language (SAML) 2.0 protocol. We currently support the following Identity Providers (IdP):</p> <ul style="list-style-type: none"> <li>• Active Directory Federation Service (ADFS)</li> <li>• Microsoft Azure</li> <li>• Okta</li> <li>• OneLogin</li> <li>• PingOne</li> <li>• PingFederate</li> </ul> <p>Documentation links:  <a href="https://help.autodesk.com/view/SSOGUIDE/ENU/?guid=SSOGUIDE_Okta_Guide_About_Single_Sign_on_SSO_html">https://help.autodesk.com/view/SSOGUIDE/ENU/?guid=SSOGUIDE_Okta_Guide_About_Single_Sign_on_SSO_html</a>   <a href="https://help.autodesk.com/view/SSOGUIDE/ENU/?guid=SSOGUIDE_Okta_Guide_About_Directo ry_Sync_html">https://help.autodesk.com/view/SSOGUIDE/ENU/?guid=SSOGUIDE_Okta_Guide_About_Directo ry_Sync_html</a></p>
1.2	<b>Secure Authentication.</b> All authentication activity occurring over the network must be encrypted using industry best practices to ensure that logins and passwords are not transmitted in clear text. This includes System User and administrator authentication activity.	Fully Compliant	Authentication and Encryption in Transit - Credentials consisting of user ID and password are required to access Autodesk Construction Cloud. Credentials are secured during network transmission and stored as a salted hash. Communication between clients and backend services is over an encrypted channel to provide communication security. The services are scanned regularly by industry-leading tools to ensure that they continue to meet the highest standards. The services support TLS v1.2 connections with secure cipher suites.
1.3	<b>Encryption.</b> Application must support industry standard methods, and at a minimum secure, modern algorithm for the encryption of Sensitive Data in transit to/from the host/server system, at rest within storage subsystem(s), and client computer(s), and must use most recent secure versions of encryption protocols such as SSL, TLS, or Secure FTP.	Fully Compliant	Communication between clients and backend services is over an encrypted channel provide communication security. The services are scanned regularly by industry-leading tools to ensure that they continue to meet the highest standards. The services support TLS v1.2 connections with secure cipher suites.
1.4	<b>System Sharing.</b> Application must not permit the transmission of City data beyond the approved City domains sandiego.gov and sannet.gov.	N/A	This is a SaaS offering.

1.5	<b>Protection of Sensitive Information and Data.</b> Proposer, its agents, employees, contractors and any other person or entity working on behalf of Proposer to provide services under this proposal must at all times comply with City of San Diego Administrative Regulation (A.R. 90.64) "Protection of Sensitive Information and Data".	N/A	As a global company, Autodesk strives to comply with all applicable data protection laws where we do business. We have policies and procedures in place that are designed to address compliance with applicable data protection laws. For more information, please see our Privacy Statement: <a href="https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement">https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement</a> Autodesk does not process sensitive personal data as the term is defined in the City of San Diego Protection of Sensitive Information and Data Administrative Regulation. Please also review the Autodesk Terms of Use Section 15.2 Offerings are not designed for storage of sensitive personal information
1.6	<b>Auditing and Logging.</b> Application must support interoperability with, and stream logs to the City's centralized Sumo Logic Security Information and Event Management (SIEM) platform for, at a minimum, all security related events including logon, logoff, data modification, data deletion, change in rights or permission levels, and the addition of data/information to the application. Logs must include user ID generating the transaction, time of the transaction and details regarding the activity (e.g. logon, logoff or data details)	Not Compliant	Autodesk does not provide the ability for customers to export logs to a SIEM.  Information on available log files can be found here: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/How-to-gather-log-files-for-Autodesk-Construction-Cloud-products.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/How-to-gather-log-files-for-Autodesk-Construction-Cloud-products.html</a>
1.7	<b>Compliance with Organization's Security Policy, Standards and Procedures.</b> Solution Proposer working directly on City-owned applications or from City facilities are subject to and required to follow all City policies, standards and guidelines. Proposer must also follow FIPS 140-2 standards which can be viewed at <a href="http://csrc.nist.gov/groups/STM/cmvp/standards.html">http://csrc.nist.gov/groups/STM/cmvp/standards.html</a> For FIPS-140-2 the City requires Level 2 compliance; the City requires at least role based authentication for access to this application	Not Compliant	Autodesk cloud services are globally accessible cloud-based services and are therefore subject to laws and regulations that may differ per country, region, and legal jurisdiction. The Autodesk Security team and Autodesk Legal team continuously monitor changes to regulatory requirements in relevant jurisdictions which affect Autodesk's legal requirements and compliance initiatives and/or information security policy.
1.8	<b>Data Integrity.</b> The Solution must ensure the integrity of all the data collected, stored and processed. Interruptions in processing due to incidents such as aborted transactions, hardware failures, or network unavailability must not result in inaccurate or inconsistent data stored and/or processed in the Application. If data transfers occur, the Application must provide a method of audit validation to ensure that all data sent to it was received and processed correctly	Fully Compliant	Autodesk solutions maintain data integrity by following industry best practices and maintain a regular audit process relying on industry-leading tools to ensure that they continue to meet the highest standards.
1.9	<b>Parameter Manipulation.</b> Parameter manipulation must not be designed to provide access to data or Application functionality that a System User is not authorized to see or use. Proposer is expected to follow OWASP standards for security at a minimum.	Fully Compliant	Autodesk integrates security with a software development lifecycle (SDLC) method which is based on industry best practices and involves threat modeling, static code analysis, third-party component analysis, dynamic testing and penetration testing. OWASP Top 10 and SANS Top 25 frameworks are leveraged in the SDLC method. Autodesk's SDLC is aligned with the BSIMM (Building Security In Maturity Model) Industry standard framework. You can learn more about our security practices at the Trust Center: <a href="https://www.autodesk.com/trust/security">https://www.autodesk.com/trust/security</a> .
1.1	<b>Hidden Fields.</b> The use of "hidden fields" for Security is prohibited. Proposer is expected to follow OWASP standards for security at a minimum.	Fully Compliant	Members of the Autodesk Security team are actively involved with the organization, Open Web Application Security Project (OWASP)
1.11	<b>Cookies.</b> Security settings must not rely on cookies. Cookies must not contain or be used to obtain sensitive information.	Fully Compliant	Please review our Cookie Statement to learn more on how we use cookies: <a href="https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement/cookie-statement">https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement/cookie-statement</a>
1.12	<b>Session Identifiers.</b> If session identifiers are utilized, they must be generated with unpredictable numbers and must contain enough keyspace to prevent unauthorized use or guessing of the session ID's. Proposer is expected to follow OWASP standards for security at a minimum.	Fully Compliant	Members of the Autodesk Security team are actively involved with the organization, Open Web Application Security Project (OWASP)

1.13	<p><b>Error Messages.</b> Errors must be handled in an appropriate manner. Failed login attempts to the Application must not display detailed information about the failed login attempt (e.g. incorrect password or unknown System User account). Other security related errors (e.g. file not found or permission denied) must generate generic error responses. Detailed error information must be written to secure logs so that developers and system administrators have access to error details <i>required to address the error</i>.</p>	Fully Compliant	Failed login messages state the username and password does not match.
1.14	<p><b>Logical Data Separation.</b> In the instances of a shared-hosting environment, including, but not limited to, shared hardware, processing, platform, application instance, software code and architecture, and security controls, Vendor must ensure that City data is logically separated from third-parties to ensure no leakage of City data occurs.</p>	Fully Compliant	<p>Autodesk logically segregates client data from non-production environments and has a multi-tenant architecture for Cloud Applications. Access to each tenant's data is protected by a customer username and password.</p> <p>Autodesk Cloud Applications have built-in security features that allow customers to create a detailed identity and access management policies. Customer Administrators are empowered with the ability to provision or de-provision users, customize access control level and sharing permissions, and enable Single Sign On with customer systems for all users.</p> <p>All data passed between the user's client and the application is through an encrypted channel while in transit.</p>
1.15	<p><b>Sensitive Data.</b> Applications containing or hosting sensitive data, as defined by State or Federal law, must encrypt data at rest, data in motion over the network and all authentication activity. Encryption algorithm used to encrypt data and authorization activity must meet HIPAA standards and be encrypted as NIST FIPS 140-2 compliant.</p>	Partially Compliant	<p>Autodesk requires users to provide their first name, last name, and email address in order to create an account through Autodesk Identity Service. For information on how we use and process personal data, please see our Privacy Statement: <a href="https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement">https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement</a>.</p> <p>Autodesk Offerings are not designed for storage of sensitive personal information. Please see section 15.2 of Autodesk Terms of Use: <a href="https://www.autodesk.com/company/terms-of-use/en/general-terms">https://www.autodesk.com/company/terms-of-use/en/general-terms</a>.</p> <p>To learn more about Autodesk's privacy program, please see our Privacy Statement at: <a href="https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement">https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement</a> and Autodesk Trust Center: <a href="https://www.autodesk.com/trust/compliance">https://www.autodesk.com/trust/compliance</a>.</p>
1.16	<p><b>Patching.</b> Application/Systems must be patched on, at a minimum, a monthly basis.</p>	Fully Compliant	<p>The Cloud Services team follows the Autodesk patch management policy to help ensure effective patch deployment. Where possible, automation is in place to check for new patches and prepare deployment lists that are approved by authorized Cloud Services personnel. The Autodesk Construction Cloud patching policy also defines criteria for determining the impact of a patch on systems stability. If a patch is identified as having a possibly high impact, Cloud Services personnel complete thorough regression testing before deploying the patch. The Cloud Services team tracks the deployment of patches to production systems. Quality Assurance includes automated and manual testing that spans the entire development and deployment process.</p>
1.17	<p><b>Vulnerability Management.</b> Vulnerabilities discovered on existing systems must be remediated within at least 30 days of discovery. Discovered vulnerabilities shall be assigned a risk ranking. High-rated vulnerabilities must be patched/remediated within 24 hours.</p> <p>All Application, Service and Systems must be scanned, with an established industry-recognized tool, and security vulnerability remediated prior to product deployment into a production environment and/or external exposure.</p>	Partially Compliant	<p>For on premise solutions, Autodesk publishes notices regarding vulnerabilities in the Trust Center. <a href="https://www.autodesk.com/trust/security-advisories">https://www.autodesk.com/trust/security-advisories</a></p>
1.18	<p><b>Mobile Device Management (MDM).</b> Mobile Devices e.g. tablets and mobile phones must be registered through DoIT's Security Team and Microsoft Intune MDM must be installed on those devices</p>	N/A	No hardware is provided through this proposal.

<b>2 Application Data</b>			
The following Application Data requirements shall apply:			
2.1	<b>Ownership of Data.</b> All data collected on behalf of the City of San Diego is the property of the City. None of the data will be used for any other purpose. Upon termination or, expiration of any contractual agreement, the Proposer will retain the City's data for a minimum of ninety (90) days and will transfer City data in its possession to the City at no cost by using a method that protects the confidentiality of the information being exchanged and as agreed upon by the City but, at a minimum, data records will be provided in ASCII comma, separated value (CSV) format, with binary images in TIFF, JPG, or PDF format.	Partially Compliant	Customer retains its ownership rights to files, designs, models, data sets, images, documents or similar material created by Customer or Customer's authorized users and submitted or uploaded to any Offering by Customer or Customer's authorized users. Please review our Terms of Use regarding Data Ownership. <a href="https://www.autodesk.com/company/terms-of-use/en/general-terms#own">https://www.autodesk.com/company/terms-of-use/en/general-terms#own</a>
2.2	<b>Personal Data.</b> Proposer agrees that it will comply with all applicable federal, state and local data protection laws and regulations in any relevant jurisdiction with respect to dealing with, disclosing and exchanging any Personal Data in connection with this Agreement. For the purpose of this Agreement, "Personal Data" means any personal identifying information including, but not limited to, customer's name, address, telephone number, social security number, and financial account numbers (including credit or debit card numbers and any related security codes or passwords).	Fully Compliant	As a global company, Autodesk strives to comply with all applicable data protection laws where we do business. We have policies and procedures in place that are designed to address compliance with applicable data protection laws. For more information, please see our Privacy Statement: <a href="https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement">https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement</a>
2.3	<b>City Data Access.</b> If proposed Solution is sub-contracted and hosted by a third party, City owned data must be available to the City of San Diego. System User access and authorizations must be provided as directed by the City of San Diego.	Fully Compliant	Customer administrator users configure and control the configuration of projects and permissions within the customer tenant.
2.4	<b>Third Party Requirements.</b> Proposer will cause any third party sub-contractor to adhere to all data privacy and security requirements no less rigorous than those set forth in this RFP.	Partially Compliant	Autodesk has a third-party risk assessment process to evaluate and identify security, privacy and compliance risks before doing business with third-party providers that have access to customer information. Autodesk requires that our third-party providers sign appropriate data protection and confidentiality contracts. For more information on our security practices, please visit Autodesk Trust Center: <a href="https://www.autodesk.com/trust/overview">https://www.autodesk.com/trust/overview</a>
2.5	<b>State Requirements.</b> Proposer is compliant with the California Consumer Privacy Act (CCPA).	Fully Compliant	As a global company, Autodesk strives to comply with all applicable data protection laws where we do business. We have policies and procedures in place that are designed to address compliance with applicable data protection laws. For more information, please see our Privacy Statement: <a href="https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement">https://www.autodesk.com/company/legal-notices-trademarks/privacy-statement</a>
<b>3 Design</b>			
The following Design requirements shall apply:			
3.1	<b>Design Documentation.</b> Proposer will provide design documentation, including but not limited to Process diagram, Interface/Integration diagram, and Infrastructure diagram.	Not Compliant	Please refer to <i>Appendix D: Security Letter from Autodesk</i> .
3.2	<b>Architecture Documentation.</b> Proposer will provide architecture documentation, including but not limited to data flow diagram, data models, database schema and Entity-Relationship diagram.	Not Compliant	Please refer to <i>Appendix D: Security Letter from Autodesk</i> .
<b>4 Desktop Hardware</b>			
The following Desktop requirements shall apply:			

4.1	<p><b>System.</b> Compatible with 64 bit systems.</p>	Fully Compliant	<p>AEC products and Autodesk BIM Collaborate Pro are compatible with 64-bit systems.</p> <p>Below are the system requirements for select AEC product for reference:</p> <ul style="list-style-type: none"> <li>• AutoCAD:  <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html</a></li> <li>• Autodesk Civil 3D:  <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a></li> <li>• Autodesk Revit:  <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html</a></li> </ul> <p>Autodesk Construction Cloud system requirements please visit <a href="https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC">https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC</a></p>
4.2	<p><b>Desktop/Laptop Hardware.</b> Hewlett-Packard (HP) brand business-class.</p>	Fully Compliant	<p>AEC desktop product are compatible with most business-class machines so long as they adhere to, or exceed, the minimum system requirements. Below are the system requirements for select AEC product for reference:</p> <ul style="list-style-type: none"> <li>• AutoCAD:  <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html</a></li> <li>• Autodesk Civil 3D:  <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a></li> <li>• Autodesk Revit:  <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html</a></li> </ul> <p>Autodesk BIM Collaborate Pro is an entirely cloud based system for online collaboration and data management. No component of the solution needs to be installed on the local client machines. This significantly reduces the time and effort needed to have contributors' access to the solution. Further details on the Autodesk Construction Cloud system requirements please visit <a href="https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC">https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC</a></p>



4.3	<b>Tablets.</b> HP ELITE X2 G4	Partially Compliant	<p>The Autodesk Construction Cloud, of which Autodesk BIM Collaborate Pro is a part of, works on Chrome, Firefox, Safari web browsers;On iOS and Android mobile and tablet devices through the Autodesk Construction Cloud App.</p> <p>The HP Elite X2 G4 device may not meet our system requirements for AEC desktop product. Please review the select system requirements below for further information:</p> <ul style="list-style-type: none"> <li>• AutoCAD: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html</a></li> <li>• Autodesk Civil 3D: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a></li> <li>• Autodesk Revit: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a></li> </ul>
4.4	<b>Tablet/Laptop Combos.</b> MS Surface Pro 7, MS Surface Pro 7+	Partially Compliant	<p>The Autodesk Construction Cloud, of which Autodesk BIM Collaborate Pro is a part of, works on Chrome, Firefox, Safari web browsers;On iOS and Android mobile and tablet devices through the Autodesk Construction Cloud App.</p> <p>The MS Surface Pro devices may not meet our system requirements for AEC desktop product. Please review the select system requirements below for further information:</p> <ul style="list-style-type: none"> <li>• AutoCAD: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html</a></li> <li>• Autodesk Civil 3D: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a></li> <li>• Autodesk Revit: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a></li> </ul>
5	<b>Desktop Software</b>		
	The following Desktop requirements shall apply:		

5.1	<p><b>Desktop Operating System.</b> Microsoft Windows 10 Enterprise, or the most current version of this Operating System to within an n-1 standard.</p>	Fully Compliant	<p>ACC desktop products are compatible with Microsoft Windows 10 and 11. Below are the system requirements for select AEC product for reference:</p> <ul style="list-style-type: none"> <li>• AutoCAD: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-AutoCAD-2023-including-Specialized-Toolsets.html</a></li> <li>• Autodesk Civil 3D: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Civil-3D-2023.html</a></li> <li>• Autodesk Revit: <a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Revit-2023-products.html</a></li> </ul> <p>There are no desktop operating system requirements for ACC products since they are web-based: <a href="https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC">https://help.autodesk.com/view/COLLAB/ENU/?guid=System_Requirements_ACC</a></p>
5.2	<p><b>Desktop Software.</b> The proposed system must not conflict with, or modify standard desktop software. Other standard software includes: ESET Antivirus, Adobe Creative Cloud; SAPGUI. The City targets n-1 if not the latest updates.</p>	Fully Compliant	<p>Autodesk solutions are designed to not conflict with other software. However, without specifics from the City of San Diego it's difficult to say for certain there won't be any issues.</p> <p>Below is a list of currently known software and devices that can conflict with Autodesk software and services.</p> <p><a href="https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Autodesk-Licensing-Service-Known-Conflicting-Applications.html">https://www.autodesk.com/support/technical/article/caas/sfdcarticles/sfdcarticles/Autodesk-Licensing-Service-Known-Conflicting-Applications.html</a></p>
5.3	<p><b>Office Productivity.</b> Microsoft Office Suite, Teams, Visio, Project</p>	Fully Compliant	<p>Autodesk - BIM Collaborate integrates with Microsoft Office Suite for viewing and editing documents, such as word and excel, from within the cloud platform.</p> <p>In addition, the AEC collection can import Microsoft Excel and Word into the CADD file.</p> <p>To Import Microsoft Excel documents into your CAD file, on the Annotate Tab &gt; Tables Panel &gt; Link Data &gt; Create a New Excel Data Link &gt; enter a name &gt; select the spreadsheet &gt; open &gt; then choose the range of data that you would like to bring into the drawing &gt; enter &gt; click ok. With this link, you can create a table. You want to create a table from the data link &gt; choose the data link created in the previous step &gt; click ok. You will then see a preview of your spreadsheet attached to your cursor and you can choose where to place it on your layout.</p> <p>To import Microsoft Word documents into your CAD file on the Annotate Tab, launch the Multiline Text tool and, using standard Windows copy and paste commands, place the text from the word document into the window. You can format this information the same way you would in word.</p>

5.4	<b>Web Browser.</b> Google Chrome and Microsoft Edge Chromium or the current manufacturer's version to within an n-1 standard.	Fully Compliant	The latest 64-bit versions of the following browsers are recommended for the Autodesk Construction Cloud product: <ul style="list-style-type: none"> <li>• Chrome (Recommended)</li> <li>• Firefox</li> <li>• Safari</li> <li>• Edge</li> </ul>
<b>6 Applications Standards</b>			
The following Applications requirements shall apply:			
6.1	<b>Programming Language Standards.</b> HTML5 (Web Presentment); Python (ESRI ArcGIS Script); ASP.net (Dynamic Web Pages); PHP; PowerShell (Windows Automation Scripting); Microsoft SQL Server Reporting Services (SSRS); Transact T-SQL (Database Programming Language); Microsoft .Net Responsive design.	Fully Compliant	Autodesk integrates security with a software development lifecycle (SDLC) method which is based on industry best practices and involves threat modeling, static code analysis, third-party component analysis, dynamic testing and penetration testing. OWASP Top 10 and SANS Top 25 frameworks are leveraged in the SDLC method. Autodesk's SDLC is aligned with the BSIMM (Building Security In Maturity Model) industry standard framework. You can learn more about our security practices at the Trust Center: <a href="https://www.autodesk.com/trust/security">https://www.autodesk.com/trust/security</a> .
6.2	<b>Data Transport Protocol Standards.</b> XML (includes JXDM); JSON; SOAP / HTTP / RESTful (web services); EDI; ACH; ESRI - File Geodatabase; GeoJSON, DWG, DGN (CADD)	Fully Compliant	Our APIs return the data in a JSON format. You can get the data in xlsx or pdf formats if you download it directly from the UI. APIs are validating the JSON data transferred to them.
6.3	<b>Desktop Configuration.</b> Desktop components for any solution must be able to be pushed to the user via the City's Service Center Configuration Manager (SCCM) platform.	Partially Compliant	By first creating deployments from your Autodesk Account, third-party tools like Microsoft Endpoint Configuration Manager (formerly known as System Center Configuration Manager, or SCCM) and PDQ Deploy can be used to push new versions, or updates, to desktops. For more information on creating deployments and installing deployments with Microsoft Configuration Manager, please visit the below sites: <a href="https://www.autodesk.com/support/download-install/admins/create-deployments/create-deployments-from-autodesk-account">https://www.autodesk.com/support/download-install/admins/create-deployments/create-deployments-from-autodesk-account</a> <a href="https://www.autodesk.com/support/download-install/admins/create-deployments/installing-deployments-with-microsoft-configuration-manager">https://www.autodesk.com/support/download-install/admins/create-deployments/installing-deployments-with-microsoft-configuration-manager</a>
6.4	<b>Reporting Tool Integration Standards.</b> SAP Crystal Reports; Microsoft SQL Server Reporting Services.	Fully Compliant	Information on available integrations can be found here: <a href="https://construction.autodesk.com/partners/integrate-with-autodesk-construction-cloud/">https://construction.autodesk.com/partners/integrate-with-autodesk-construction-cloud/</a>
6.5	<b>Web Content Management System.</b> Drupal	N/A	Autodesk Cloud applications are not a web content management system
6.6	<b>Document Management Integration.</b> OpenText.	Not Compliant	This requirement is out of scope for the nature of the proposal.

6.7	<p>Geographic Information System and Integration Standards. ESRI - ArcGIS Desktop; RouteSmart / ArcGIS Network Analyst</p>	Partially Compliant	<p>Civil 3D can consume current ESRI ArcGIS Map, Feature, and Image Services. The information below covers the methods available.</p> <p>Autodesk has partnered with ESRI to seamlessly integrate the ability to access ESRI data from a GIS enterprise solution installed on site or an enterprise solution that is hosted in the ESRI cloud.</p> <p>&lt;IMAGE001.png&gt; Importing data to Civil 3D from GIS Ribbon</p> <p>&lt;IMAGE002.png&gt; Publishing Civil 3D objects to GIS Ribbon</p> <p>This integration enables the Civil 3D user to import and export to ESRI ArcGIS Map the geometric design data, including: cogo points, alignments, parcels Feature lines, and pipe networks. By having a coordinate system defined in the Civil 3D drawing file, the Output&gt;Publish to ArcGIS command will publish whatever geometric data the user selects directly to the ArcGIS environment. This information can then be used in the ArcGIS environment for standard GIS workflows. Once the user is ready to pull the data back into the Civil 3D environment, the user will create a Civil 3D drawing file with the coordinate of choice. Using the Insert&gt;Autodesk Connector for GIS command, the user can import into the active drawing the Civil 3D objects that are desired. During this process, the Civil 3D data will be translated on-the-fly to the active Civil 3D drawings coordinate system. Extended attribution on Civil geometric entities will come in as Property Sets within the Civil 3D environment. ESRI</p>
	<p>Hosting Standards:</p>		
	<p>The following hosting requirements shall apply:</p>		
7.1	<p>City Hyper Converged Infrastructure. If solution is proposed as 'On Premise', it must support either:</p>	N/A	<p>The ability to use Autodesk software in a virtual environment depends on what product you're using, how you purchased it, and whether the terms of use for that purchase plan permit virtualization. Check the system requirements of your software to be sure it will run in a virtual environment.</p> <p>Autodesk provides technical support to make sure that your software works properly, but doesn't provide technical support for your virtual environment. If you have an issue that requires technical support, our support experts may need to verify that the issue is related to your software and not the virtual environment. They may ask you to replicate the problematic behavior in a physical environment. If it can be replicated, they will provide support. If it can't be replicated, contact your Virtualization provider for support.</p> <p>Learn more about our virtualization policy.</p>

7.1A	<p><b>Hyper Converged Infrastructure:</b> server, shared-storage, networking equipment, and software for infrastructure management. The City's standard Integrated Infrastructure Model is the VMWare Virtual Cloud Foundation.</p>	Partially Compliant	<p>The ability to use Autodesk software in a virtual environment depends on what product you're using, how you purchased it, and whether the terms of use for that purchase plan permit virtualization. Check the system requirements of your software to be sure it will run in a virtual environment.</p> <p>Autodesk provides technical support to make sure that your software works properly, but doesn't provide technical support for your virtual environment. If you have an issue that requires technical support, our support experts may need to verify that the issue is related to your software and not the virtual environment. They may ask you to replicate the problematic behavior in a physical environment. If it can be replicated, they will provide support. If it can't be replicated, contact your virtualization provider for support.</p> <p><a href="#">Learn more about our Virtualization policy.</a></p>
7.1B	<p><b>Standalone server</b> – HP ProLiant Generation 10 or higher.</p>	Partially Compliant	<p>The ability to use Autodesk software in any environment depends on what product you're using, how you purchased it, and whether the terms of use for that purchase plan permit it. Check the system requirements of your software to be sure it will run within the environment.</p> <p>Autodesk provides technical support to make sure that your software works properly, but doesn't provide technical support for your virtual environment. If you have an issue that requires technical support, our support experts may need to verify that the issue is related to your software and not the virtual environment. They may ask you to replicate the problematic behavior in a physical environment. If it can be replicated, they will provide support. If it can't be replicated, contact your virtualization provider for support.</p> <p><a href="#">Learn more about our Virtualization policy.</a></p>
7.2	<p><b>Server OS.</b> Solution must support Server Operating System – Microsoft Windows Server, SuSe Linux versions must be within N-1.</p>	Partially Compliant	<p>The ability to use Autodesk software in any environment depends on what product you're using, how you purchased it, and whether the terms of use for that purchase plan permit it. Check the system requirements of your software to be sure it will run within the environment.</p> <p>Autodesk provides technical support to make sure that your software works properly, but doesn't provide technical support for your virtual environment. If you have an issue that requires technical support, our support experts may need to verify that the issue is related to your software and not the virtual environment. They may ask you to replicate the problematic behavior in a physical environment. If it can be replicated, they will provide support. If it can't be replicated, contact your virtualization provider for support.</p> <p><a href="#">Learn more about our Virtualization policy.</a></p>

7.3	<p><b>Web Servers.</b> If proposed system is locally hosted, it must support web servers – Microsoft IIS and Apache to an n-1 standard.</p>	Partially Compliant	<p>The ability to use Autodesk software in any environment depends on what product you're using, how you purchased it, and whether the terms of use for that purchase plan permit it. Check the system requirements of your software to be sure it will run within the environment.</p> <p>Autodesk provides technical support to make sure that your software works properly, but doesn't provide technical support for your virtual environment. If you have an issue that requires technical support, our support experts may need to verify that the issue is related to your software and not the virtual environment. They may ask you to replicate the problematic behavior in a physical environment. If it can be replicated, they will provide support. If it can't be replicated, contact your virtualization provider for support.</p> <p>Learn more about our Virtualization policy.</p>
7.4	<p><b>Virtual Servers.</b> Solution must support virtual server hosting – VMware ESX (to an n-1 standard).</p>	Not Compliant	<p>The ability to use your software in a virtual environment depends on what product you're using, how you purchased it, and whether the terms of use for that purchase plan permit virtualization. Check the system requirements of your software to be sure it will run in a virtual environment.</p> <p>Autodesk provides technical support to make sure that your software works properly, but doesn't provide technical support for your virtual environment. If you have an issue that requires technical support, our support experts may need to verify that the issue is related to your software and not the virtual environment. They may ask you to replicate the problematic behavior in a physical environment. If it can be replicated, they will provide support. If it can't be replicated, contact your virtualization provider for support.</p> <p>Learn more about our Virtualization policy.</p>
7.5	<p><b>Relational Database Management Systems.</b> If solution is proposed as 'On Premise', it must support Relational Database Management Systems (RDBMS) – Microsoft SQL Server version within N-1.</p>	Partially Compliant	<p>Autodesk's Civil 3D and Revit can connect to external database systems and consume both spatial and non-spatial information for improved design and decision making. Refer to the below links for additional information:</p> <ul style="list-style-type: none"> <li>• About Autodesk Revit DB Link</li> <li>• How to configure and attach an Access or Excel file data source for AutoCAD Map 3D</li> <li>• About Map Files and FDO Data Sources</li> <li>• About Geospatial Data</li> </ul>
7.6	<p><b>Cloud.</b> Providers are Amazon web Services (AWS), Microsoft Azure, and Google Cloud platform (GCP) with AWS being the preferred public cloud platform. Current services provided include Infrastructure as a Service (IaaS), Platform as a Service (PaaS), Software as a Service (SaaS), Microservices, Storage and Archiving. <b>Public Cloud</b> solutions must reside within the borders of the United States and support either Microsoft Azure, AWS or GCP. Private Cloud using Virtual Cloud Foundation or VMC on Aws are the Standards.</p>	Fully Compliant	<p>Autodesk Cloud services are multi-tenant SaaS services that Autodesk manages on behalf of customers. Autodesk Cloud Services are hosted in Amazon Web Services (AWS) in accounts that Autodesk owns and manages. Please see the Autodesk Terms of Use for more information.</p>



Purchasing & Contracting Department

April 9, 2024

VIA EMAIL TO: [Shaun.gaffrey@dlt.com](mailto:Shaun.gaffrey@dlt.com)

Mr. Shaun Gaffrey, Contract Manager  
DLT Solutions, LLC  
2411 Dulles Corner Park, STE 800  
Herndon, VA 20171

Reference: Request for Proposal (RFP) 10089997-23-C, Computer Aided Design Drafting Software (CADD)

Dear Mr. Gaffrey:

Subject: Exceptions

This letter confirms our agreement to modify the terms of the above-referenced solicitation and the Contract relating to the above-referenced solicitation. The Parties agree to the following Exceptions as follows:

1. The City agrees to modify the following sentence of the Contract, Recitals as follows:

City wishes to retain Contractor to provide Computer Aided Design Drafting Software (CADD) services as further described in the Contractor's proposal which was incorporated herein by reference (Services).

2. The City agrees to modify the Contract, Article II, 2.1 Term as follows:

**2.1 Term.** This Contract shall be for a period of five (5) years beginning on the Effective Date. The City may exercise the option by mutual written agreement to extend this Contract for one (1) additional three (3) year period. This option shall be mutually agreed to in writing not less than thirty (30) days prior to expiration of the five year term.

3. The City agrees to modify the Contract, Article I, Contractor Services, 1.1 Scope of Work as follows:

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

4. The City agrees to modify the Contract, Article I, 1.2 General Contract Terms and Provisions as follows:

**1.2 General Contract Terms and Provisions.** This Contract incorporates by reference the negotiated General Contract Terms and Provisions.

5. The City agrees to modify the Contract, Article V, 5.2 Contract Interpretation as follows:

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

6. The City agrees to modify the Contract, Article V, 5.3 Precedence as follows:

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

- 1<sup>st</sup> Any properly executed written amendment to the Contract
- 2<sup>nd</sup> Contractor's Proposal and the City's written acceptance of any exceptions taken by the Contractor or clarifications to the RFP, including this Exceptions Letter.
- 3<sup>rd</sup> The Contract
- 4<sup>th</sup> Contractor's Pricing
- 5<sup>th</sup> The RFP.

7. The City agrees to modify Exhibit C, City's General Contract Terms and Conditions, 1.3 Contract Extension as follows:

**1.3 Contract Extension.** The City may exercise an option to extend the Contract by mutual written agreement of both parties if authorized under Charter section 99 and the Contract Documents.



8. The City agrees to modify Exhibit C, City's General Contract Terms and Conditions, 3.2.6.1 Monthly Employment Utilization Reports as follows:

**3.2.6.1 Monthly Employment Utilization Reports.** Except for the subcontractors or suppliers whose obligations are limited to providing commercially available off the shelf software subscriptions ("COTS") under this contract, Contractor and Contractor's subcontractors and suppliers must submit Monthly Employment Utilization Reports by the fifth (5<sup>th</sup>) day of the subsequent month.

9. The City agrees to modify Exhibit C, City's General Contract Terms and Conditions, 4.1 City's Right to Suspend for Convenience as follows:

**4.1 City's Right to Suspend for Convenience.** City may suspend all or any portion of Contractor's performance under this Contract at its sole option and for its convenience for a reasonable period of time not to exceed six (6) months. City must first give ten (10) days' written notice to Contractor of such suspension. City will pay to Contractor the agreed upon value of the goods and services provided as of the date of suspension. Notwithstanding the foregoing, in no event shall the City's right to suspend for convenience under Section 4.1 of this Contract entitle the City to any refund of amounts previously paid to the Contractor for the software subscriptions provided under this Contract.

10. The City rejects DLT's request to modify Exhibit C, City's General Contract Terms and Provisions, 4.2 City's Right to Terminate for Convenience.

11. The City rejects DLT's request to modify Exhibit C, City's General Contract Terms and Provisions, 4.3 City's Right to Terminate for Default.

12. The City rejects DLT's request to modify Exhibit C, City's General Contract Terms and Provisions, Article IV Suspension and Termination to include an option for DLT to terminate the contract for default.

13. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, 4.5.1 Termination for Convenience as follows:

**4.5.1 Termination for Convenience.** If the termination is for the convenience of City, City will pay Contractor for the goods delivered and services rendered up to the date of termination, according to the pricing schedule. No amount shall be allowed for anticipated profit on unperformed services, and no amount shall be paid for an as needed contract beyond the Contract termination date. Notwithstanding the foregoing, in no event shall the City's right to terminate this contract for convenience entitle the City to any refund of amounts previously paid to the Contractor for the software subscriptions provided under this Contract.

14. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, 4.5.2 Termination for Default as follows:

**4.5.2 Termination for Default.** If, after City gives notice of termination for failure to fulfill Contract obligations to Contractor, it is determined that Contractor had not so failed, the termination shall be deemed to have been effected for the convenience of City. In such event, City will pay Contractor for the goods and/or services provided up to the date of termination, according to the pricing schedule. In no event shall the City's right to terminate this Contract for default or convenience entitle the City to any refund of amounts previously paid to the Contractor for the software subscriptions provided under this Contract.

15. The City agrees to delete Exhibit C, City's General Contract Terms and Provisions, Article V, 5.1 Inspection and Acceptance as follows:

**5.1 Reserved.**

16. The City agrees to delete Exhibit C, City's General Contract Terms and Provisions, Article V, 5.2 Responsibility for Lost or Damaged Shipments as follows:

**5.2 Reserved.**

17. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article V, 5.4 Delivery so that the following sentence is deleted in its entirety:

The City may order, in writing, the suspension, delay or interruption of delivery of goods and/or services.

18. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article V, 5.6 Restrictions and Regulations Requiring Contract Modification as follows:

**5.6 Restrictions and Regulations Requiring Contract Modification.** Contractor shall immediately notify the City in writing of any regulations or restrictions that may or will require Contractor to alter the material, quality, workmanship, or performance of the goods and/or services to be provided. City reserves the right to accept any such alteration, including any resulting reasonable price adjustments, or to cancel the Contract at no expense to the City. Contractor shall have the right to terminate the contract for convenience in the event that any new law, regulation, or policy is enacted that renders the services or software provided under this contract illegal or noncompliant. Contractor will provide at least 60 days notice of termination due to software rendered illegal or noncompliant.

19. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article V, 5.9 Records Retention and Examination as follows:

**5.9 Records Retention and Examination.** Contractor shall retain, protect, and maintain in an accessible location all records and documents, including paper, electronic, and computer records, relating to this Contract for five (5) years after receipt of final payment by City under this Contract. Contractor shall make all such records and documents available for inspection, copying, or other reproduction, and auditing by authorized representatives of City, including the Purchasing Agent or designee. Contractor shall make available all requested data and records at reasonable locations within City or County of San Diego at any time during normal business hours, and as often as the City deems necessary. If records are not made available within the City of County of San Diego, Contractor shall make the records electronically available to the City. Failure to make requested records available for inspection, copying, or other reproduction, or auditing by the date requested may result in termination of the Contract. Except for subcontracts with subcontractors or suppliers whose obligations are limited to providing commercially available off the shelf software subscriptions ("COTS") under this contract, contractor must include this provision in all subcontracts made in connection with this contract.

20. The City agreed to modify Exhibit C, City's General Contract Terms and Provisions, Article V, 5.9.1 as follows:

**5.9.1** Contractor shall maintain records of all subcontracts entered into with all firms, all project invoices received from Subcontractors, all purchases of materials and services from Subcontractors, and all joint venture participation. Records shall show name, telephone number including area code, and business address of each Subcontractor, and joint venture partner, and the total amount actually paid to each firm. Project relevant records, regardless of tier, may be periodically reviewed by the City.

21. The City agrees to delete Exhibit C, City's General Contract Terms and Provisions, Article V, 5.12 Safety Data Sheets as follows:

**5.12 Reserved.**

22. The City agrees to delete Exhibit C, City's General Contract Terms and Provisions, Article VI, 6.1 Rights in Data as follows:

**6.1 Reserved.**

23. The City agrees to delete Exhibit C, City's General Contract Terms and Provisions, Article VI, 6.2 Intellectual Property Rights Assignment as follows:

**6.2 Reserved.**

24. The City agrees to delete Exhibit C, City's General Contract Terms and Provisions, Article VI, 6.7 Publication as follows:

**6.7 Reserved.**

25. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article XIII, 13.4 Subcontractors as follows:

**13.4 Subcontractors.** All persons assigned to perform any work related to this Contract, including any subcontractors, are deemed to be agents of Contractor, and Contractor shall be directly responsible for their work. For the avoidance of doubt and notwithstanding anything to the contrary in the Contract or Contractor's Proposal, the parties agree that Autodesk, Inc. shall not be considered a subcontractor under the Contract.

26. The City rejects DLT's request to modify Exhibit C, City's General Contract Terms and Provisions, Article XIII, 13.12 Drafting Ambiguities.

27. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article XIII, 13.16 Confidentiality of Services as follows:

**13.16 Confidentiality of Services.** All services performed by Contractor, and any subcontractor(s) if applicable, including but not limited to all drafts, data, information, correspondence, proposals, reports of any nature, estimates compiled or composed by Contractor, which were solely and exclusively performed for and created by the Contractor or subcontractor(s) for the City under this Contract, are for the sole use of City, its agents, and employees.

28. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article III, 3.1 Manner of Payment as follows:

**3.1 Manner of Payment.** Notwithstanding the foregoing, the parties agree that the City will pay the Contractor for any software subscriptions provided under this agreement on an annual, up-front basis.

29. The City agrees to delete Exhibit C, City's General Contract Terms and Provisions, Article III, 3.2.6.2 Monthly Invoicing and Payments as follows:

**3.2.6.2 Reserved.**

30. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article IV, 4.3.1 as follows:

**4.3.1** If Contractor fails to satisfactorily cure a default within thirty (30) calendar days of receiving written notice from City specifying the nature of the default, City may immediately cancel and/or terminate this Contract, and terminate each and every right of Contractor, and any person claiming any rights by or through Contractor under this Contract.

31. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article IV, 4.3.2 as follows:

**4.3.2** If the City terminates this Contract, in whole or in part, for default under Sections 4.3 and 4.3.1, the City may procure, upon such terms and in such manner as the Purchasing Agent may deem appropriate, equivalent goods and services and Contractor shall be liable to City for any excess costs. Notwithstanding the foregoing, in no event shall the City's right to terminate this Contract for default entitle the City to any refund of amounts previously paid to the Contractor for the software subscriptions provided under this contract.

32. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article V, 5.13.1 Criminal Background Certification as follows:

**5.13.1 Criminal Background Certification.** Contractor certifies that all employees working on this Contract have had a criminal background check and that said employees are clear of any sexual and drug related convictions. Contractor further certifies that all employees hired by Contractor or a subcontractor shall be free from any felony convictions. DLT represents that Autodesk, its software supplier, hires employees with access to confidential data under organizational procedures, including a detailed application form, background verification (where allowable by law), and agreement to confidentiality terms.

33. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article VI, 6.6 Software Licensing as follows:

**6.6 Software Licensing.** DLT represents that Autodesk, its software supplier, uses reasonable measures to monitor its Offerings against viruses, trojan horses, self-replicating or other computer instructions that may, without user's consent, (a) alter, destroy, inhibit or discontinue user's use of the Offerings, (b) erase, destroy, corrupt or modify Offering Content, (c) store any data, programs, materials or information on user's computers, or (d) bypass any internal or external security measure to obtain access to resources of user (collectively, "Harmful Code"). Harmful Code does not mean or include license restrictions, maximum user restrictions, authorization or registration requirements, or similar usage restrictions.

34. The City agrees to delete Exhibit C, City's General Contract Terms and Provisions, Article VI, 6.8 Royalties, Licenses, and Patents as follows:

**6.8 Reserved.**

35. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article VII, 7.2.4 Technology Professional Liability Errors and Omissions Insurance as follows:

**7.2.4 Technology Professional Liability Errors and Omissions Insurance** appropriate to the Consultant's profession and work hereunder, with limits not less than \$2,000,000 per occurrence. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by the Vendor in this agreement and shall include, but not be limited to, claims involving security breach, system failure, data recovery, business interruption, cyber extortion, social engineering, infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, and alteration of electronic information. This policy shall provide coverage for breach response costs, regulatory fines and penalties.

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

For the avoidance of doubt and notwithstanding anything to the contrary in the Contract or Contractor's Proposal, the parties agree that Autodesk, Inc. shall not be considered a subcontractor under the Contract.

36. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article VII, 7.2.5.3 Notice of Cancellation as follows:

**7.2.5.3 Notice of Cancellation.** Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to City. For the avoidance of doubt and notwithstanding anything to the contrary in the Contract or Contractor's Proposal, the parties agree that Autodesk, Inc. shall not be considered a subcontractor under the Contract.

37. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article VII, 7.2.5.5 Claims Made Policies (applicable only to professional liability) as follows:

**7.2.5.5 Claims Made Policies (applicable only to professional liability).** The Retroactive Date must be shown and must be before the date of the contract or the beginning of the contract work. Insurance must be maintained and evidence of insurance must be

provided for at least five (5) years after completion of the contract of work. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, Contractor must purchase "extended reporting" coverage for a minimum of five (5) years after completion of work.

Notwithstanding the foregoing, the parties agree that the timeframes included in Section 7.2.5.5 will be reduced from five (5) years to two (2) years for the subcontractors. For the avoidance of doubt and notwithstanding anything to the contrary in the Contract or Contractor's proposal, the parties agree that Autodesk, Inc. shall not be considered a subcontractor under the Contract.

38. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article VIII, 7.3 Self Insured Retentions as follows:

**7.3 Self Insured Retentions.** Self-insured retentions must be declared to and approved by City. City may require Contractor to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or City. For the avoidance of doubt and notwithstanding anything to the contrary in the Contract or Contractor's Proposal, the parties agree that Autodesk, Inc. shall not be considered a subcontractor under the Contract.

39. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article VIII, 7.5 Verification of Coverage as follows:

**7.5 Verification of Coverage.** Contractor shall furnish City with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by City before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive Contractor's obligation to provide them. City reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time. Due to the terms and conditions of US CAD, these conditions will not apply.

40. The City agrees to modify Exhibit C, City's General Contract Terms and Provisions, Article IX, 9.1.2 Contractor Certification for Americans with Disabilities Act (ADA) and State Access Laws and Regulations as follows:

**9.1.2 Contractor Certification for Americans with Disabilities Act (ADA) and State Access Laws and Regulations:** Contractor warrants and certifies compliance with all federal and state access laws and regulations and further certifies that any subcontract agreement for this contract, except for subcontract agreements with subcontractors or suppliers whose obligations are limited to providing commercially available off the shelf software

subscriptions (“COTS”) under this contract, contains language which indicates the subcontractor’s agreement to abide by the provisions of the City’s Council Policy and any applicable access laws and regulations.

41. The City agrees to modify Exhibit C, City’s General Contract Terms and Provisions, Article IX 9.1.11.1 Contractor and Subcontract Requirement as follows:

**9.1.11.1 Contractor and Subcontract Requirement.** The Equal Pay Ordinance applies to any subcontractor, except for subcontractors or suppliers whose obligations are limited to providing commercially available off the shelf software subscriptions (“COTS”) under this contract, who performs work on behalf of a Contractor to the same extent as it would apply to that Contractor. Any Contractor subject to the Equal Pay Ordinance shall require all of its subcontractors, except for subcontractors whose obligations are limited to providing commercially available off the shelf software subscriptions (“COTS”) under this contract, to certify compliance with the Equal Pay Ordinance in its written subcontracts.

42. The City agrees to modify Exhibit C, City’s General Contract Terms and Provisions, Article V, 5.7 Warranties as follows:

**5.7 Warranties.** All goods and/or services provided under the Contract must be warranted by Contractor or manufacturer for at least twelve (12) months after acceptance by City, except automotive equipment. Automotive equipment must be warranted for a minimum of 12,000 miles or 12 months, whichever occurs first, unless otherwise stated in the Contract. Contractor is responsible to City for all warranty service, parts, and labor. Contractor is required to ensure that warranty work is performed at a facility acceptable to City and that services, parts, and labor are available and provided to meet City’s schedules and deadlines. Contractor may establish a warranty service contract with an agency satisfactory to City instead of performing the warranty service itself. If Contractor is not an authorized service center and causes any damage to equipment being serviced, which results in the existing warranty being voided, Contractor will be liable for all costs of repairs to the equipment, or the costs of replacing the equipment with new equipment that meets City’s operational needs. Notwithstanding the foregoing, the parties agree that as applied to the software subscriptions Contractor will provide under this Contract, this Section 5.7 will not apply to the software subscriptions and the software supplier’s standard warranty and right of return provisions will apply.

43. The City agrees to modify Exhibit B, Scope of Work, Section E, 1. System User Software License Agreements as follows:

1. The City agrees that any purchase of Autodesk, Inc. offerings under this Contract shall be subject to the Autodesk Terms of use (available at <https://www.autodesk.com/company/terms-of-use/en/general-terms> or at any successor site as designated by Autodesk).



44. The City agrees to modify Exhibit B, Scope of Work, Section E, Products Licenses, Section (1)(d) Unused Licensing Volume as follows:

d. Unused Licensing Volume. The City acknowledges that any unused subscriptions will not roll-over into subsequent terms and the City will not be entitled to a refund for any unused subscriptions.

45. The City agrees to modify Exhibit B, Scope of Work, Section E 1. Product Licenses, Section (1)(f) Not-to-Diminish Rights as follows:

f. Not-to-Diminish Rights. The software supplier providing the Commercial Off the Shelf ("COTS") software subscriptions to the Contractor under the Contract will endeavor to maintain the functionalities of the solution purchased by the City, irrespective of whether it has been purchased as a set of more than one software product supplied as a single price, for the duration of the agreement, but always subject to the right for the software supplier to make changes to the offerings as may be stated in its standard terms of use for the software provided under the the Contract.

46. The City rejects DLT's request to modify Exhibit A, Section A (2.14).

47. The City agrees to delete Exhibit A, Section A (5) Quantities as follows:

5. Reserved.

48. The City rejects DLT's request to modify Exhibit A, Section A (9) Public Records.

49. The City agrees to modify Exhibit B, Section E (c) Licensing Volume Changes as follows:

c. Licensing Volume Changes. Prior to the start of each year of the 5 year Contract term, and each year of the 3 year option Contract term ("Contract Year"), the City shall have the option to choose one of the 6 licensing Tier options set forth in Exhibit D: Pricing Proposal conditioned on product availability and the City's compliance with the notification requirement as stipulated below.

The City must notify the Contractor in writing at least forty-five (45) days before the start of each Contract Year of the licensing Tier the City has chosen for the upcoming Contract Year. Once chosen, the City will not be entitled to switch between licensing Tiers during any single Contract Year. The specific Autodesk Offerings, subscription quantities and associated pricing by Tier for any particular Contract Year are conditioned on the commercial availability of the Autodesk Offerings included in each of the 6 licensing Tier options for the relevant Contract Year.

50. The City agrees to modify Exhibit B, Section F (1) as follows:

1. The Contractor's software supplier may make available to the City of San Diego updates or upgrades to the software during the period of subscription in accordance with the software supplier's standard terms of use.
  
51. The City agrees to delete Exhibit B, Section F (1)(a) Scheduled Maintenance as follows:
  - (a) Reserved.
  
52. The City agrees to delete Exhibit B, Section F (1)(b) as follows:
  - (b) Reserved.
  
53. The City agrees to delete Exhibit B, Section F (1)(d) Application Administration as follows:
  - (d) Reserved.
  
54. The City agrees to delete Exhibit B, Section F (1)(e) Application Administration as follows:
  - (e) Reserved.
  
55. The City agrees to delete Exhibit B, Section E (1)(g) Third Party Use as follows:
  - (g) Reserved.
  
56. The City agrees to delete Exhibit B, Section F (1)(c) Hosting Facility Services as follows:
  - c. Reserved.
  
57. The City agrees to delete Exhibit B, Section F (1)(f) Ownership of Data as follows:
  - f. Reserved.
  
58. The City agrees to delete Exhibit B, Section F (2)(a-1) Service Level Requirements in it's entirety as follows:
  2. Reserved.
  
59. The City agrees to delete Exhibit D, Pricing Proposal in it's entirety and replace with the enclosed Exhibit D, Pricing Proposal
  
60. The City agrees to modify Exhibit C, Section 7.1 Indemnification as follows:

**7.1 Indemnification.** To the fullest extent permitted by law, Contractor shall defend (with legal counsel reasonable acceptable to City), indemnify, protect, and hold harmless City

Mr. Shaun Gaffrey, Contract Manager  
April 9, 2024  
Page 13 of 13

and its elected officials, officers, and employees (Indemnified Parties) from and against any and all third-party claims, losses, costs, damages, injuries (including, without limitation, injury to or death of an employee of Contractor or its subcontractors), expense, and liability of every kind, nature and description (including, without limitation, incidental and consequential damages, court costs, and litigation expenses and fees of expert consultants or expert witnesses incurred in connection therewith and costs of investigation) that arise out of, pertain to, or relate to, directs or indirectly, whole or in part, any goods provided or performance of services under this Contract by Contractor, any subcontractor, anyone directly or indirectly employed by either of them, or anyone that either of them control. Contractor's duty to defend, indemnify, protect and hold harmless shall not include any claims or liabilities arising from the sole negligence or willful misconduct of the Indemnified Parties.

Please indicate your agreement with the above by signing the bottom of this letter. Thank you for your assistance.

Sincerely,



Taylor Cox  
Senior Procurement Contracting Officer, Purchasing & Contracting

Enclosure: 1. Exhibit D, Pricing Proposal

This Letter is executed by the City and Contractor acting by and through their authorized officers.

DLT Solutions, LLC

By: Kirk M. Fisher Digitally signed by Kirk M. Fisher  
Date: 2024.04.09 15:40:10 -04'00'

Name: Kirk M. Fisher

Title: Vice President

Date: 04/09/2024

THE CITY OF SAN DIEGO

By: [Signature]

Name: Claudis C. Aracena

Title: Director, Purchasing & Contracting

Date: July 7, 2024

Enclosure 1

**EXHIBIT D: Pricing Proposal - Cloud Based SaaS Solution**

The city shall have the option to choose one of the 6 tier options each year for the duration of the 8 year contract. Each tier moves up in increments of 50 seats. For example if the city would like 325 users, they would select Tier 1 and the discount associated with Tier 1 would be applied to 325 seats. Tier 1 covers 300 - 349 seats. If the city then decides they want 425 seats in year 4, they would select Tier 3 and have the discount applied that's associated with Tier 3. Please note the total pricing changes based on the exact number of seats chosen. For example, 325 seats will have the discounted per user rate for Tier 1, and 340 seats will have the same discounted per user rate for Tier 1. However, 340 seats will be a higher price because it's more seats. The offer is made out of a combination of Cloud Based SaaS Solution and Desktop Solution. Autodesk considers the desktop solution (we assume that with Off-Premises - Hosted the City refers to the Desktop solution) to be Cloud-enabled. The prices reported in this sheet are associated to the following Autodesk products, with the following weight on the total price: AEC Collection 57%, Premium 6%, Build 26% and BIM Collaborate Pro 11%.

	One-Time	Tier 1 (300)	Tier 2 (350)	Tier 3 (400)	Tier 4 (450)	Tier 5 (500)	Tier 6 (550)					
<b>Autodesk Software CADD Delivery Team</b>												
<b>Section 1: Licensing and Maintenance Costs</b>												
<b>Option A - Enterprise License (Unlimited Users)</b>												
Enterprise License Fees: Unlimited Users	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Maintenance and/or License Fee Add-Ons	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other (Explain)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Option A Total Costs</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Option B - Named Users Based Pricing</b>												
License Fees	\$0.00	\$1,053,253.68	\$1,190,322.69	\$1,310,717.04	\$1,423,809.38	\$1,505,455.68	\$1,595,978.31				\$0.00	\$0.00
Number of Named Users	200	300	350	400	450	500	550	0	0	0	0	0
Price per User	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Option B Total Costs</b>	<b>\$0.00</b>	<b>\$1,053,253.68</b>	<b>\$1,190,322.69</b>	<b>\$1,310,717.04</b>	<b>\$1,423,809.38</b>	<b>\$1,505,455.68</b>	<b>\$1,595,978.31</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Section 2: Implementation, Transition, and Training Costs</b>												
<b>Implementation, Transition, and Training Costs (see list below)</b>												
Cost	\$127,242.00	\$272,750.00	\$438,770.00	\$390,215.00	\$85,343.00	\$85,343.00	\$92,170.44	\$99,544.08	\$107,507.61	\$0.00	\$0.00	\$0.00
<b>Total Implementation, Transition, and Training Costs</b>	<b>\$127,242.00</b>	<b>\$272,750.00</b>	<b>\$438,770.00</b>	<b>\$390,215.00</b>	<b>\$85,343.00</b>	<b>\$85,343.00</b>	<b>\$92,170.44</b>	<b>\$99,544.08</b>	<b>\$107,507.61</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Section 3: Other Additional Costs</b>												
Storage Limitations and/or Additional Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Additional Software Licenses or Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Additional Service Cost (for example, cloud broker services, or provisioning services)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Exit and Decommissioning Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Other Additional Costs</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

Please see the attached pdf for a detailed Implementation Services pricing methodology. **Exhibit D - Services Pricing Methodology.pdf**  
Phases/Milestones indicated in this methodology align with the timeline Schedule referenced in the Proposal Section 5.

Services in year 5 are the baseline for years 6-8 increasing at 10% year over year.

<b>Minimum Discount Off of List Price for Additional Purchases</b>	
Percentage Discount Off of List Price	0.00%
*Note: Percentage Discount Off of List Price will not be considered in the award process, however it is requested that bidders complete this section to facilitate additional, unplanned purchases and future functionality.	

Implementation and Transition Costs must be comprehensive, including, but not limited to, the following:

- |  |   |   |
|--|---|---|
| User Training Cost                         | Develop Modifications and Interfaces                                | Change Management and/or Any Other Training |
| Project Strategy, Planning and Management  | Integration to Other Software                                       | Deployment                                  |
| Business Requirements Analysis             | Data Conversion (may include data mapping, migration or cleansing)  | Stabilization/Post-Go-Live Transition       |
| Application Configuration and System Setup | Testing (unit, system, performance, user acceptance and regression) |   |

Enclosure 1

Estimate Summary

Phase	Phase Name	Hours	Total	Project/Program Manager		Assistant / Deputy Project Manager		Technical Lead		Training Lead		Technical Support Lead		IT & Quality Assurance Services Lead		Administrator	
				Hours	Rate \$250	Hours	Rate \$230	Hours	Rate \$225	Hours	Rate \$200	Hours	Rate \$200	Hours	Rate \$180	Hours	Rate \$125
	Services Mobilization	10%	\$127,242														
1.0	Project Kick Off, Preparation, and Finalization of Business Requirements (Milestone Steps 1 and 2)	293	\$61,115	38	\$9,500	19	\$4,370	107	\$24,075	84	\$16,800	7	\$1,400	4	\$720	34	\$4,250
2.0	Configuration, Interfaces, and Data Migration (Milestone Step 3)	978	\$211,635	0	\$0	17	\$3,910	684	\$153,900	256	\$51,200	0	\$0	0	\$0	21	\$2,625
3.0	Workflow Development and Acceptance Testing (Milestone Steps 4 & 5)	520	\$110,235	10	\$2,500	10	\$2,300	365	\$82,125	0	\$0	0	\$0	117	\$21,060	18	\$2,250
4.0	Training Training Manuals for 325 Users included (Milestone Step 6)	2584	\$657,070	54	\$13,500	54	\$12,420	0	\$0	2422	\$484,400	0	\$0	0	\$0	54	\$6,750
5.0	Cut Over and Acceptance (Milestone Steps 7 & 8)	294	\$61,680	16	\$4,000	32	\$7,360	144	\$32,400	2	\$400	20	\$4,000	64	\$11,520	16	\$2,000
6.0	Post-Production Maintenance and Support Product Update & Enhancement Workshops (Milestone Step 9)	878	\$170,685	6	\$1,500	42	\$9,660	65	\$14,625	345	\$69,000	114	\$22,800	270	\$48,600	36	\$4,500
	<b>TOTALS</b>	<b>5547</b>	<b>\$1,272,420</b>	<b>124</b>	<b>\$31,000</b>	<b>174</b>	<b>\$40,020</b>	<b>1365</b>	<b>\$307,125</b>	<b>3109</b>	<b>\$621,800</b>	<b>141</b>	<b>\$28,200</b>	<b>455</b>	<b>\$81,900</b>	<b>179</b>	<b>\$22,375</b>
<b>PROPOSAL TOTAL</b>			<b>\$1,399,662</b>														