EXHIBIT A – SCOPE OF SERVICES
RFP 26-1068

1. INTRODUCTION AND PURPOSE

The San Diego Convention Center Corporation ("Corporation") is soliciting proposals from qualified and experienced Companies ("Consultant") to assess current project management practices and implement a best-in-class Project Management Program ("PMP"). The selected Consultant will partner with Corporation to improve construction, engineering, and capital project delivery, integrate technology, and strengthen governance to ensure efficient, transparent, and sustainable project execution.

2. BACKGROUND

Corporation manages a complex and diverse capital improvement and construction program supporting convention operations, major events, and facility maintenance. Projects range from small renovations to large multi-million-dollar capital projects. To meet evolving demands, Corporation seeks to elevate project management maturity and establish a PMO with clear governance, integrated technology, and standardized processes. The San Diego Convention Center ("Center") was built in 1989. The Center features 2.6 million gross sq. ft. with 615,701 sq. ft. of exhibit space, and 204,114 sq. ft. of meeting space including two 40,000 sq. ft. ballrooms. The Center is home to 284,494 sq. ft. of pre-function, lobby and registration space, as well as 184,514 sq. ft. of outdoor terrace space.

3. CONSULTANT CAPABILITIES

The selected Consultant must clearly demonstrate in their Technical Proposal their relevant experience and proven ability to meet the following requirements:

A. Certifications & Professional Credentials
- Proven track record of implementing Project Management Programs (PMP) in large complex public or private projects with similar number of projects and construction dollar value.
- Depth of staff and resources having both experience in construction and PMP implementation.
- Established methodologies for evaluating and implementing project controls, governance, and risk management.
- Experience implementing Project Management Information Systems (PMIS) and performing integrations with financial, procurement, contracting, and asset management platforms.
- Experience documenting processes at all stages of construction, from budgeting to the transfer to maintenance operations.

B. Construction Management Program Development Skills
- Analyzing and implementing strategic Planning & Governance
- Ability to assess current project management maturity, identify gaps, and recommend governance structures (e.g., establishing or strengthening a PMP).
- Experience developing policies, standard operating procedures (SOPs), and performance metrics for budgeting, scheduling, and reporting.
- Implementation of Cost, Schedule, and Risk Controls
- Recommending best practices in cost estimating, budgeting, and earned value management.
- Recommending optimal scheduling methods and platforms.

- Ability to identify risk, assist in quantifying risk analysis, and mitigation planning.
- Knowledge of public-sector procurement laws and best practices (Request for Proposals, Invitation to Bid, Design-Bid-Build, CM-at-Risk, Job Order Contracting, etc.).

C. **Technology & Software Implementation Capabilities**
- Experience with the implementation of CMIS/PMIS platforms such as Procore, e-Builder, Autodesk Construction Cloud, Smartsheet, or Oracle Primavera Unifier.
- Ability to assist with the configuration and customization of dashboards, workflows, and reporting templates for cost, schedule, submittals, RFIs, change orders, and close-out.

D. **Systems Integration**
- Proven skills overseeing the integrating CM software with finance, procurement, and asset management systems (e.g., Microsoft Business Central, NexGen).
- Competence in assisting clients with data migration and interface development (API-based connections, data governance, and security).

E. **Change Management & Training**
- Proven methods for user adoption and change management (stakeholder engagement, pilot testing, phased rollout).
- Conducting training and knowledge transfer plans with user manuals and role-based training sessions.

F. **Communication & Stakeholder Engagement**
- Strong facilitation and stakeholder management skills to engage executives, department heads, contractors, and community members.
- Experience establishing internal and external communication protocols (dashboards, newsletters, SharePoint, or other collaboration tools).

G. **Risk, Compliance & Sustainability**
- Cybersecurity and data privacy compliance for hosted or cloud-based solutions.
- See Section 6 - PMIS Software Requirements for cybersecurity requirements.

4. SCOPE OF SERVICES AND REQUIRED DELIVERABLES
Consultant shall provide a comprehensive, phased approach encompassing assessment, planning, software procurement, implementation, training, and post-implementation evaluation. At a minimum, the technical proposal must describe how Consultant will provide or address all, but not limited to, the following deliverables:

PHASE I – Assessment and Recommendations by Consultant
Phase one of the project scope shall be implemented within the first ninety (90) days upon contract execution.

1. Comprehensive Project Management Maturity Report
   - Assess current project management maturity.
   - Identify gaps and opportunities for improvement based on stakeholder interviews, document reviews, and assessments.

2. Create and Deliver Roadmap & Governance Recommendations
   - Recommend organizational changes, governance structures, and process improvements to evolve into a PMO framework.
   - Define decision and authority framework between engineering, maintenance, procurement, and asset management.
   - Recommend system for operational oversite with prevailing wage, bond, DIR, GC payments, insurance, and other various compliance and regulatory processes.

3. Capital Improvement Planning & Budgeting
   - Evaluate current capital improvement budgeting tools and provide recommendations for scoring, prioritizing, and optimizing project inputs.
   - Recommend best practices for scope-of-work writing and estimating.

4. Contracting and Procurement Review
   - Assess existing contracting and procurement practices and contract clauses.
   - Recommend enhancements to mitigate risk and improve efficiency.

PHASE II – Technology, Integration, Process Development, and Training
Upon completion of phase one, Consultant shall provide recommendations for first-in-class construction program management software programs that will meet the following requirements:

A. Technology and Integration

1. Project Management Information System (PMIS)
   - Identify and recommend multiple Project Management Information Systems that best fit Corporation's needs, and support implementation of the selected PMIS including detailed software specifications and integration strategy.
   - Capable of integrating with the current Corporation Finance, Procurement, Asset Management, and other platforms (e.g., CRM, Business Central, NEXGEN).
   - Provide detailed software specifications and integration strategy.
   - See Section 6 - PMIS Software Requirements for software requirements.

2. Scheduling Platform & Dashboards
   - Recommend a project scheduling platform and best practices.
   - Develop dashboards for real-time project and capital program visibility, including KPIs such as budget adherence, schedule adherence, cost to date, RFIs, change orders, and safety metrics.

3. Contractor Performance Evaluation:
   - Recommend a contractor evaluation platform that will provide a system to evaluate the contractor's performance on each project.

4. Digital Filing & Record Management
   - Establish a digital filing system with a proposed folder structure and system of records.

B. Process Development and Documentation

1. Standardized Construction Project Lifecycle Processes
   - Document process flows, roles, responsibilities, and approval authorities for each stage in:
     - Budget development and approval
     - Acquisition strategy and preliminary master schedule
     - Scope definition and estimating
     - Bid management and contract award
     - Design and construction
     - Project closeout, including manuals, as-builts, commissioning, warranty transfer, and maintenance handoff.

2. Templates and Construction Management Plans
   - Provide standardized templates such as project charters, issue logs, communication plans, and comprehensive construction management plans including safety, quality assurance, change management, and meeting protocols.

3. Communication & Coordination Protocols
   - Suggest construction vendor communication plans to engage contractors, sub-contractors, DBVE businesses, and various trade organizations to support the execution of construction and capital improvement projects.

C. Staffing and Training

1. Staff Recommendations
   - Provide recommended staffing and consultant levels for annual budgets of approximately $5M, $10M, $20M, and $30M, covering 15–60 projects per year.
   - Define roles, responsibilities, and recommended certifications.

2. Training & Knowledge Transfer
   - Develop and deliver a comprehensive training program covering technical and soft skills to ensure long-term PMP sustainability.
   - Provide ongoing support during handover and conduct a PMP performance evaluation at the 6-month.

6. PMIS SOFTWARE REQUIREMENTS

a) System Architecture & Hosting

- **Cloud, On-Premises, or Hybrid Deployment:** Specify acceptable deployment models (e.g., SaaS, private cloud, on-premises). Describe the architecture of the system.
- **Scalability:** The platform must support growth in users, projects, and data volume without performance degradation. Provide supporting details describing the scalability of the platform.
- **High Availability & Disaster Recovery:** Documented details of uptime SLAs (e.g., 99.999%), automated backups, and disaster recovery plans.

b) Authentication & Security

- **Single Sign-On (SSO):** Must support SSO via Azure AD to enable seamless user authentication and access control.
- **Role-Based Access Control (RBAC):** Fine-grained permissions for users, groups, and roles, with audit trails for all access and changes.
- **Data Encryption:** All data must be encrypted at rest and in transit (e.g., AES-256, TLS 1.2+).
- **Compliance:** The system must comply with relevant standards (e.g., CJIS, SOC 2, ISO 27001, NIST, CCPA, GDPR as applicable). SDCCC is a California-based corporation. CCPA compliance is a must. Provide details on CCPA and other compliance standards the platform meets.
- **Audit Logging:** Comprehensive logging of user activity, system changes, and data access, with exportable audit reports. Provide examples of the audit reports as well as a detailed description of how logging works within the application space.

c) Integration & Interoperability

- **API Availability:** Open, well-documented RESTful APIs for integration with financial, procurement, asset management, HR, and other enterprise systems (e.g., Microsoft Business Central, NextGen). Provide detailed information on the data dictionary and API call library that is available for SDCCC to use.
- **Data Import/Export:** Bulk data import/export tools supporting standard formats (CSV, Excel, XML, JSON).
- **Third-Party Integrations:** Ability to connect with common construction and project management tools (e.g., Procore, e-Builder, Autodesk Construction Cloud, Smartsheet, Oracle Primavera Unifier). Provide examples with details of any relevant integrations SDCCC could find useful for comparison.

d) Reporting, Dashboards & Analytics

- **Single Source of Truth:** Support for master data management and synchronization with authoritative systems.

e) Data Management & Governance

- **Data Retention & Archiving:** Configurable retention policies to meet public records requirements and legal holds.
- **Data Ownership:** The Corporation retains full ownership of all data; vendors must provide data extraction upon contract termination.
- **Data Migration:** Vendor must provide migration services and tools for legacy data import.
- **Data Quality Controls:** Validation, deduplication, and error handling mechanisms. Show detailed examples of this in action.

f) User Experience & Accessibility

- **Web-Based Interface:** Modern, responsive UI accessible from major browsers and mobile devices.
- **Accessibility:** Compliance with WCAG 2.1 AA or higher for users with disabilities.
- **Localization:** Support for multiple languages if required.
- **Native mobile app for iOS.**
- **Customizable Dashboards:** Real-time dashboards for KPIs (budget, schedule, RFIs, change orders, safety metrics, etc.). Provide detailed examples of "out of the box" reports and dashboards as well as detailed examples of customized reports and customized dashboards. Show the main differences between out of the box vs customizations. Explain if SDCCC can create their own customized reports

and dashboards. Provide details on how customized reports and dashboards can be built by SDCCC users.

- **Ad Hoc Reporting:** Users can create, schedule, and export custom reports. Show examples.
- **Data Visualization:** Built-in tools for charts, graphs, and trend analysis. Show examples.

g) Workflow Automation & Notifications

- **Configurable Workflows:** Support for custom approval chains, notifications, and escalations. Provide detailed examples of how custom workflows can be configured by SDCCC users. Show the workflows in action and how they would be consumed by end users. Be detailed and specific with these examples.
- **Automated Alerts:** Email, SMS, or in-app notifications for key events (e.g., approvals, deadlines, changes).

h) Change Management & Training

- **User Training:** Vendor must provide comprehensive training (on-site, remote, self-paced), user manuals, and knowledge base. Show detailed examples of training documentation. Provide a detailed sample training plan for different tiers of users: Basic consumer of information, Project Manager, Executive Sponsor, IT.
- **Change Management Support:** Tools and services for phased rollout, pilot testing, and stakeholder engagement. Provide detailed examples of how change management is supported
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i) Compliance, Risk, and Sustainability

- **Cybersecurity:** Adherence to cybersecurity best practices and regular vulnerability assessments.
- **Data Privacy:** Compliance with data privacy laws and internal policies.

j) Support & Maintenance

- **Service Level Agreements (SLAs):** Defined response and resolution times for support requests. Provide details on the definitions around responses and the resolution of time commitments you provide for each scenario. Provide real world examples of issues, the definitions for response, and associated time to resolve. Provide historic time to resolve by issue severity.

- **Ongoing Maintenance:** Regular updates, security patches, and feature enhancements. Provide current or historic update schedules and provide details on the cadence for regular patches and feature enhancement updates. Provide details on the lifecycle of security patches: discovery – time to patch deployment.

- **Customer Support:** 24/7 support availability, with escalation procedures. Describe the resources available to customer users. Provide examples of phone support, online chat support, web-based knowledgebase articles, and training videos.

k) Other Considerations

- **Records Management:** Features to support public records requests, legal holds, and e-discovery.
  - SDCCC is often required to produce records upon request through the FOIA. The vendor should describe how their system can support the extraction of data through such a request.

- **Vendor Background:** Require disclosure of any data breaches, litigation, or regulatory actions in the past five years.
  - Vendor should list, provide details and explain any data breaches, litigation or regulatory actions in the past five years.
  - Vendor should provide reasonable descriptions of the resulting resolution for each issue they list.
- **Exit Strategy:** Clear process for data return, transition assistance, and system decommissioning.
  - Vendor should provide information on how SDCCC would extract its data from the platform if we were to move away to a different solution.