



**THIRD AMENDMENT TO AN AGREEMENT  
BETWEEN**

**COUNTY OF SAN MATEO**

**AND**

**DELOITTE CONSULTING**

**For the period of  
March 1, 2001 through June 30, 2003**

Contact Person:

*Kathryn Ciamarro*

*Director of Automation*

*(650) 595-7578*

**THIRD AMENDMENT TO AGREEMENT**

**WITH DELOITTE CONSULTING**

**FOR CONSULTING SERVICES FOR THE DATA WAREHOUSE PROJECT  
AND THE GEOGRAPHIC INFORMATION SYSTEMS PILOT PROJECT**

THIS AMENDMENT TO AN AGREEMENT, entered into on this \_\_\_\_\_ day of \_\_\_\_\_, 2002, by and between the COUNTY OF SAN MATEO, hereinafter called "County," and Deloitte Consulting, hereinafter called "Contractor".

**WITNESSETH:**

WHEREAS, the parties entered into an Agreement on March 1, 2001, for the purpose of Deloitte Consulting to provide consulting services to San Mateo County for the Data Warehouse Project; and

WHEREAS, the parties entered into a First Amendment on August 7, 2001, extending the term of the Agreement, increasing the amount and adding the transitional phase of the Data Warehouse Project.

WHEREAS, the parties entered into a Second Amendment on February 26, 2002, for the purpose of extending the term of the Agreement, increasing the amount, adding the Outcome-Based Management Data Development Project and the Support & Training Project, both are an extension of the Data Warehouse Project; and

WHEREAS, the parties now wish to further amend the Agreement to extend the term, increase the amount and add the Geographic Information Systems Pilot Project, another extension of the Data Warehouse Project;

**NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES AS FOLLOWS:**

1. **Section 1: Exhibits** is hereby amended to add the following:

Exhibit J: Statement of Work - SHARP Data Warehouse - GIS

2. **Section 3: Term** is hereby amended to read as follows:

The term of the Agreement shall be from 3/1/01 to 6/30/03.

3. **Section 4: Payments** is hereby amended to read as follows:

In consideration of the services rendered in accordance with all terms, conditions and specifications set forth herein in Exhibits A, B, C, D, E, F, G, H, I, J and attachment E, County shall make payments to Contractor in the manner specified in Exhibits A, B, C, D, E, F, G, H, I, J and attachment E. In the event that the County makes any advance payments, Contractor agrees to refund any amount in excess of the amount owed by the County at the time of contract termination. In no event shall total payment under this Agreement exceed \$2,426,735, of which \$1,715,090 is

for Data Warehouse services, \$388,500 is for the OBM project, \$130,505 is for Informatica software purchased through Deloitte Consulting and \$192,640 is for the Geographic Information Systems Pilot Project.

All other terms and conditions of the Agreement dated March 1, 2001, and subsequent Amendments, between the County and Contractor shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto, by their duly authorized representatives, have affixed their hands.

COUNTY OF SAN MATEO

ATTEST:

By: \_\_\_\_\_  
Jerry Hill, President  
Board of Supervisors

\_\_\_\_\_  
Clerk of the Board

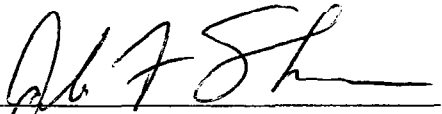
Dated: \_\_\_\_\_

Date: \_\_\_\_\_

DELOITTE CONSULTING L.P.  
By: Deloitte Consulting (US) LLC

\_\_\_\_\_  
Contractor - Print Name

John F. Skowron, Principal  
Name, Title - Print

  
Signature

Date: 8/22/02

Tax ID# 06-1454515

# Exhibit J

## Statement of Work

### San Mateo Human Services Agency Analytical Reporting Project (SHARP) Data Warehouse – Geographic Information System (GIS)

*Submitted July 8<sup>th</sup>, 2002*



**Deloitte  
Consulting**

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## SHARP Data Warehouse - GIS Project

The Human Services Agency (HSA) of San Mateo County developed a data warehouse (SHARP) to integrate data from various systems within the Agency. Currently the SHARP data warehouse contains County client information. The County has now identified the need to have a Geographic Information System (GIS) to plot the client information in a geographical map. Deloitte Consulting will be retained to:

- Establish Methodology for the GIS implementation.
- Explore the features and capabilities of GIS.
- Perform knowledge transfer activities to County staff.
- Integrate with the countywide GIS and SHARP data warehouse.
- Generate the first set of maps.

To accomplish the above listed goals Deloitte Consulting will:

- I. Define the GIS Pilot Business Requirements.
- II. Design and Develop GIS Maps.
- III. Conduct Testing.
- IV. Move to Production.

## Scope of Work

### *I. Define GIS Pilot Business Requirements*

The County will identify the functional and technical requirements for the development of the GIS functionality. As directed by the County Project Manager, Deloitte Consulting will conduct interviews with key stakeholders and hold sessions to identify requirements for the creation of the *geographic maps to display spatial data using a GIS mapping tool*.

Deloitte Consulting will assist the County in prioritizing the requirements of GIS and advise the County on the scope of work that can be completed within the specific term of the agreement.

Criteria for this decision will include the scope relevance to County strategic goals, data availability (in the SHARP Data Warehouse) and data quality, and staff availability.

### **County Responsibilities**

- Participate in GIS requirements sessions to provide specific mapping requirements.
- Prioritize business requirements and determine final scope of work.

### **Deloitte Responsibilities:**

- Coordinate and facilitate the GIS requirements sessions with key functional and technical stakeholders.
- Identify the HSA mapping requirements.
- Identify key data loading requirements.

- Provide HSA with prioritization criteria for business requirements.
- Recommend final scope to SHARP Steering Committee.

#### **Deliverables**

- GIS Business Requirements Document.

#### **Completion Criteria**

- Completed GIS requirement sessions.
- Review and acceptance of Business Requirements Document by SHARP Steering Committee.

### ***II. Design and Develop GIS Maps<sup>1</sup>***

Deloitte Consulting will design and create geographic maps based on the final business requirements. In addition, Deloitte Consulting will develop standards for the implementation of geographic maps including standard fonts, colors, templates etc.

#### **County Responsibilities**

- Assist with design of geographic maps and development of standards.
- Provide data extracts from the SHARP data warehouse.
- Determine appropriate procedures for refreshing the data, and determine the users of the geographic maps.

#### **Deloitte Responsibilities:**

- Provide the requirement of the data extract to SHARP team.
- Create design standards for GIS development.
- Design geographic map template.
- Match data extracts to geographic map requirements.
- Identify and resolve data quality issues.
- Create geographic map and associated help text.

#### **Deliverables**

- GIS Design and Implementation document.

#### **Completion Criteria**

- The geographic maps created during this phase will address the needs outlined in the Business Requirements Document (submitted at the end of - I. Define GIS Pilot Business Requirements).

### ***III. Conduct Testing***

Deloitte Consulting will assist the County, to create a test plan and utilize the test discrepancy resolution process that was implemented for the SHARP project. Once the geographic maps are developed the County users will be able to test the functionality of these maps using the GIS mapping tool. The County will complete resolution and retesting of testing issues.

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<sup>1</sup> *Sample geographic maps that will be used to display spatial data using a GIS mapping tool – see appendix A-C*

### **County Responsibilities**

- Create testing plan.
- Install and test GIS mapping tool for County testing.
- Identify and provide adequate resources for testing tasks.
- Modify maps to resolve test discrepancies.
- Develop test discrepancy resolution process.
- Retest test discrepancies.

### **Deloitte Responsibilities:**

- Assist in the development of the testing plan.
- Provide technical support to county testers.
- Modify the geographic maps to resolve test discrepancies.

### **Deliverables**

- Test Results Document.

### **Completion Criteria**

- Review and acceptance of the Test Results Document by SHARP Steering Committee.

## ***IV. Move to Production***

Production data will be loaded, and geographic maps will be migrated to the production environment.

### **County Responsibilities**

- Validate data quality prior to production load.
- Migrate final geographic maps from testing to the production environment.

### **Deloitte Responsibilities:**

- Ensure successful migration from testing to production environment.

### **Deliverables**

- Completed GIS Data Load.

### **Completion Criteria**

- Review and acceptance of GIS data load by SHARP steering committee.



## Deloitte Staff

The figure below shows the number of hours and duration of each Deloitte staff assigned to the GIS project.

Level	Hours	Duration
Project Partner	16	9/5 – 11/18
Project Manager	440	9/5 – 11/18
GIS Analyst	440	9/5 – 11/18
<b>TOTAL</b>	<b>896</b>	<b>9/5 – 11/18</b>

## Deloitte Consulting Pricing

Deloitte Consulting will invoice HSA using a blended, hourly rate for all staff of \$215 for the GIS Project. This rate is inclusive of all expenses associated with this effort. The total cost associated with this effort will not exceed \$192,640 based on 896 labor hours.

Deloitte Consulting has will bring on a project team that we believe can complete the tasks outlined in this Scope of Work within the project time frames. Any changes to this staffing model may impact the work plan, blended rate and/or total project cost. Change to the total cost will require a contract amendment.

## Key Assumptions

The following are key assumptions for the Geographic Information Systems Pilot Development.

- The extent of Deloitte Consulting's involvement in the Geographic Information functionality for the SHARP Data Warehouse development will be from 08/05/2002 to 10/18/2002.
- Deloitte Consulting will invoice HSA on a monthly basis. For a given month, the invoice will be based upon each staff member's actual hours worked on the project multiplied by the blended hourly rate of \$215.
- Deloitte Consulting will work with the County to finalize the work plan for the Geographic Information functionality for the SHARP Data Warehouse Development. This work plan will clearly document the responsibilities of the County and Deloitte Consulting. This work plan must be finalized within 2 weeks of the starting of the project.
- The County will adhere to the schedule and allotted times for each of County's tasks as agreed to by County and Deloitte Consulting Project Managers. Delays in the completion of any or all of County's tasks will extend the scheduled completion dates for subsequent tasks and work of both County and Deloitte Consulting by a corresponding amount.
- The County must identify 2-3 users for the GIS functionality for the SHARP Data Warehouse.
- The County Project Manager will be responsible for identifying the requirements team.
- The County must select, procure and install the GIS tool in a timely manner so as not to have an adverse impact on the productive work and schedule for the implementation of GIS functionality for the SHARP data warehouse.

- The selection, procurement and installation of the GIS mapping tool will be the responsibility of the County. Deloitte Consulting will play an assistance role during this task.
- The development of the extracts from the SHARP Data Warehouse will be the responsibility of the County. Deloitte Consulting will provide the extract specifications.
- Deloitte Consulting will revise the work plan after the completion of the GIS Pilot Business Requirements Definition Phase. Criteria for this decision will include relevance of requirements to County strategic goals, data availability, data quality, and resource availability. This revised work plan will include the final business requirements that may be completed in the remaining time and budget.

# Appendix A: Sample Map

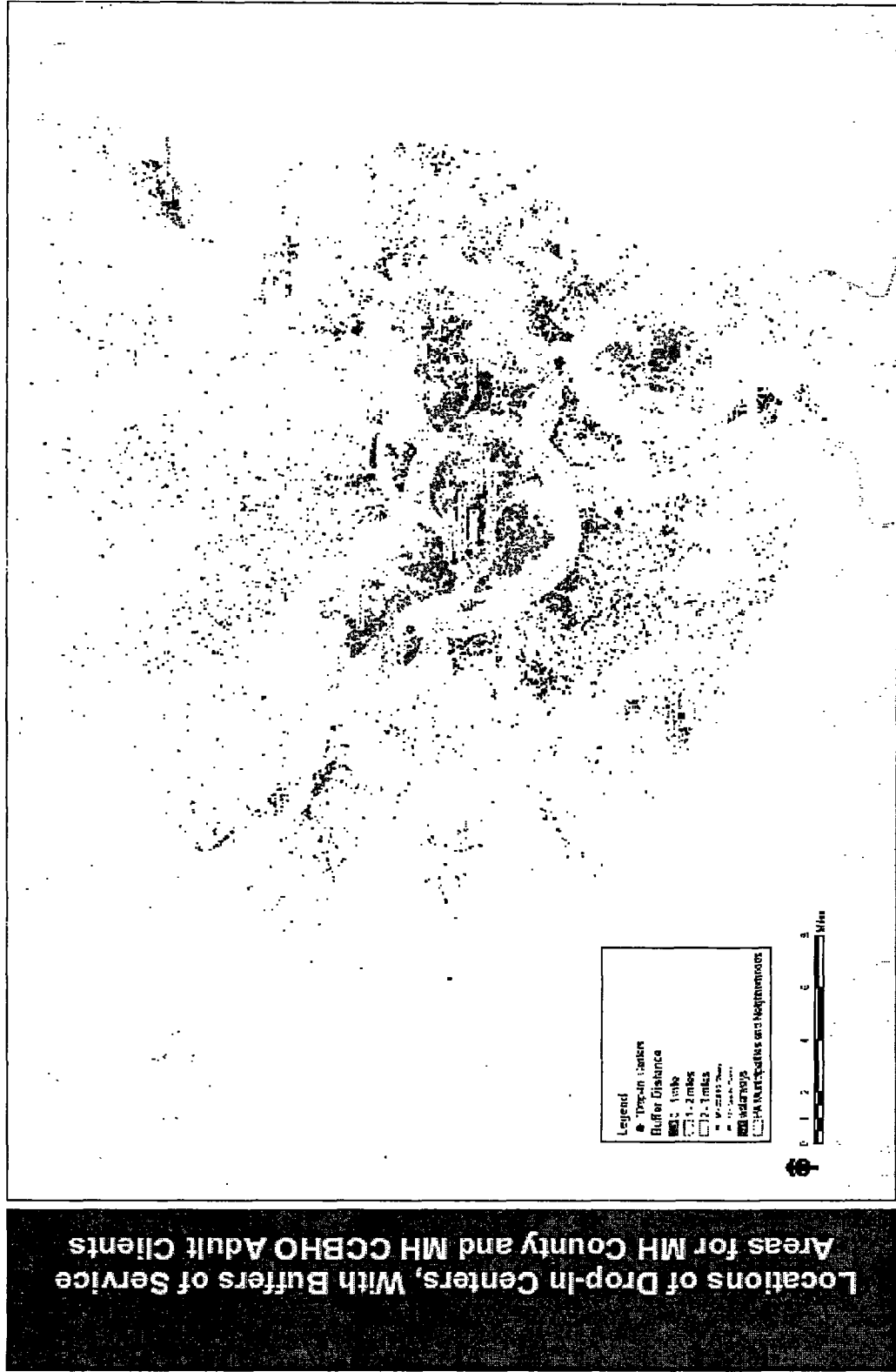


Figure 1: Map of Drop in Locations in Allegheny County

## Appendix B: Sample Map

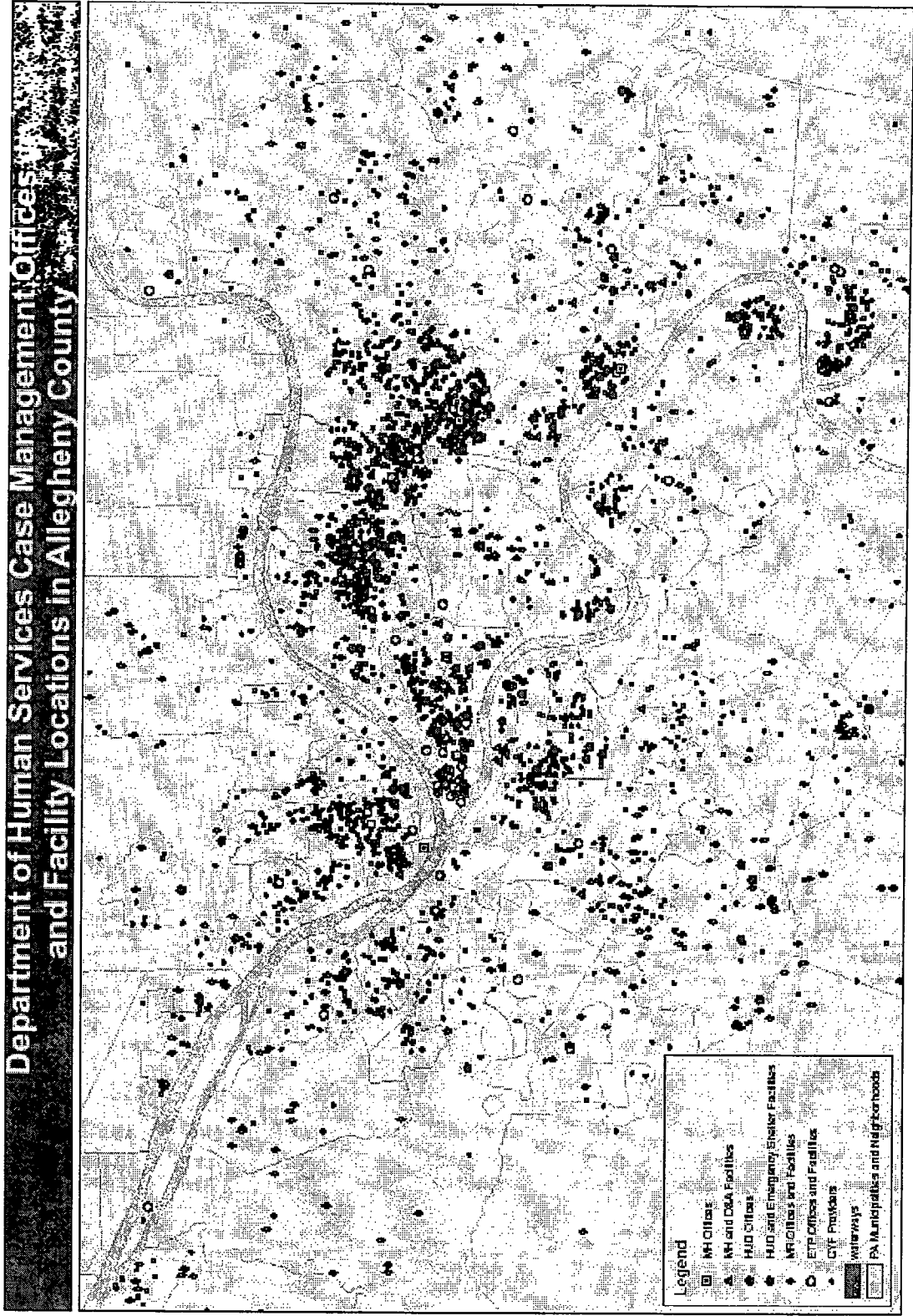


Figure 2: Map of Case Management Offices and Facility Locations


## Appendix C: Sample Map



Figure 3: Percent Difference in MR Client Count and 1% of the Population by Region

COUNTY OF SAN MATEO  
MEMORANDUM

DATE: August 25, 2000

TO:  Pricilla Harris Morse

FROM: Lucho Bravo/Debbie Jaeger FAX 596-3478

SUBJECT: APPROVAL OF INSURANCE

CONTRACTOR: Deloitte & Touche USA LLP

DO THEY TRAVEL: N/A

PERCENT OF TIME N/A

NUMBER OF EMPLOYEES N/A

DUTIES (SPECIFIC): To provide consulting services for the Data Warehouse project which will integrate data from two different sources

COVERAGE:	Amount	Approve	Waive	Modify
Comprehensive Gen Liability	\$1m/3m	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motor Vehicle Liability	_____	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Professional Liability	_____	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Worker's Compensation	Statutory	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

REMARKS/COMMENTS:

  
 Manager, Risk Management

SUBMIT TO RISK MANAGEMENT  
PONY EPS163

OR

FAX 363-4864

C:\My Documents\Contracts2002\RiskMgmt.doc

**MARSH USA INC.**

**CERTIFICATE OF INSURANCE**

CERTIFICATE NUMBER  
NYC-99997408-00

PRODUCER  
Marsh USA Inc.  
4 Stamford Plaza  
107 Elm Street  
Stamford, CT 06902  
Ph: (203) 964-2500

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER OTHER THAN THOSE PROVIDED IN THE POLICY. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES DESCRIBED HEREIN.

**COMPANIES AFFORDING COVERAGE**

- COMPANY  
A TRANSPORTATION INSURANCE CO
- COMPANY  
B CONTINENTAL CASUALTY CO
- COMPANY  
C TRANSCONTINENTAL INS CO
- COMPANY  
D

530003-CAS-

INSURED  
Deloitte & Touche USA LLP  
  
10 Westport Road  
P O Box 620  
Willen, CT 06897-0820

**COVERAGES**

THIS IS TO CERTIFY THAT POLICIES OF INSURANCE DESCRIBED HEREIN HAVE BEEN ISSUED TO THE INSURED NAMED HEREIN FOR THE POLICY PERIOD INDICATED NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THE CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, CONDITIONS AND EXCLUSIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

CO LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
A	GENERAL LIABILITY	GL 251924351	06/01/02	05/01/03	GENERAL AGGREGATE \$ 3,000,000
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY	GL 251924396 (Canada)	06/01/02	05/01/03	PRODUCTS - COMP/OP AGG \$ 2,000,000
B	<input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR	GL 251924401 (Puerto Rico)	06/01/02	05/01/03	PERSONAL & ADV INJURY \$ 1,000,000
	<input type="checkbox"/> OWNERS & CONTRACTOR'S PROT				EACH OCCURRENCE \$ 1,000,000
					FIRE DAMAGE (Any one fire) \$ 1,000,000
					MCC EXP (Any one person) \$ 10,000
	AUTOMOBILE LIABILITY				COMBINED SINGLE LIMIT \$
	<input type="checkbox"/> ANY AUTO				BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS				BODILY INJURY (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS				PROPERTY DAMAGE \$
	<input type="checkbox"/> HIRED AUTOS				
	<input type="checkbox"/> NON-OWNED AUTOS				
	GARAGE LIABILITY				AUTO ONLY - EA ACCIDENT \$
	<input type="checkbox"/> ANY AUTO				OTHER THAN AUTO ONLY:
					EACH ACCIDENT \$
					AGGREGATE \$
	EXCESS LIABILITY				EACH OCCURRENCE \$
	<input type="checkbox"/> UMBRELLA FORM				AGGREGATE \$
	<input type="checkbox"/> OTHER THAN UMBRELLA FORM				\$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	WC 251924334	06/01/02	05/01/03	<input checked="" type="checkbox"/> NO STATUTORY LIMITS <input type="checkbox"/> OTHER
	THE PROPRIETOR/PARTNERS/EXECUTIVE OFFICERS ARE:	<input type="checkbox"/> INCL <input checked="" type="checkbox"/> EXC			EL EACH ACCIDENT \$ 1,000,000
	OTHER				EL DISEASE-POLICY LIMIT \$ 1,000,000
					EL DISEASE-EACH EMPLOYEE \$ 1,000,000

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/SPECIAL ITEMS (LIMITS MAY BE SUBJECT TO DEDUCTIBLES OR RETENTIONS):

Reference: Human Services Agency

**CERTIFICATE HOLDER**

San Mateo County  
400 Harbor Blvd, Building C  
Belmont, CA 94002

**CANCELLATION**

SHOULD ANY OF THE POLICIES DESCRIBED HEREIN BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE INSURER AFFORDING COVERAGE WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED HEREIN, BUT FAILURE TO MAIL SUCH NOTICE SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER AFFORDING COVERAGE, ITS AGENTS OR REPRESENTATIVES.

MARSH USA INC.  
By: John Lapreay  
MM1(9/99)

VALID AS OF: 05/31/02