

## ***Schedule 10.3 — Relationship Management***

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## **1. OVERVIEW**

This Schedule 10.3 (Relationship Management) sets forth the roles and responsibilities of the entities for the relationship management (“Relationship Management”) provided under the Agreement as part of the Services. Relationship Management are the activities, as further detailed in this Schedule 10.3, required to support County’s overall relationship with the Contractor.

County recognizes that Relationship Management Services are an essential component for successful contract management and ongoing County - Contractor relationship satisfaction. County requires a relationship with Contractor based on the following key ingredients, including:

- Mutual trust and respect
- Excellent communication between both Entities
- Well-defined objectives and service levels
- Appropriate governance structures
- Well-defined roles and responsibilities

## **2. HIGH LEVEL REQUIREMENTS**

The Contractor relationship management team will work with the County team to achieve a number of County relationship goals and objectives, including:

- Delivery of high-quality IT and telecommunication services to support County business needs
- Continued high customer satisfaction from all technical and operational End-Users of Services
- Continuous recommendation of improvements to the functionality, creation and delivery of Services—to the extent that County business objectives would be better served
- Development of the business rationale and benefits of any proposed changes and communicate these to the team and other County stakeholders, as appropriate
- Working within the mutually-agreed upon structure regarding processes and procedures
- Assisting County in its planning activities as required
- Ensuring sufficient and continued communication

The following are additional County and Contractor relationship management functions that are essential to managing the relationship:

- Financial management
- Performance management
- Contract management

### 3. RELATIONSHIP COUNTERPART

The following table defines the hierarchy and relationship counterpart by County and Contractor roles.

County of San Diego	Contractor
Chief Administrative Officer	Executive Vice President & General Manager
Assistant Chief Administrative Officer	Vice President of State, Local and Education, U.S. Public Sector
Chief Information Officer	Account Executive
CTO Contract Manager	Contracts Manager

### 4. RELATIONSHIP MANAGEMENT ROLES AND RESPONSIBILITIES

Relationship Management Roles and Responsibilities		
Strategy and Planning	Contractor	County
1. Provide Contractor with County strategic business and technology imperatives that require Contractor support		X
2. Recommend services, technologies and/or products to County's IT management that add value to County	X	
3. Review projects and project plans	X	
4. Review and approve projects and project plans		X
5. Develop strategic IT plan to support County strategic business plans		X
6. Participate in the development of County strategic business plans, as requested by County	X	
7. Develop/implement operational plans in accordance with authorized strategic IT plan, architecture and implementation strategies	X	
8. Review and approve operational plans in accordance with authorized strategic IT plan, architecture and implementation strategies		X
9. Provide IT research assistance on new technologies	X	
10. Provide Business case assistance and preparation, as required	X	

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Relationship Management Roles and Responsibilities		
11. Provide IT solutions, expertise, and advisory services that are appropriately aligned with County's needs and business focus	X	
12. Establish business criteria for all services, standards and delivery requirements		X
13. Recommend appropriate Services, standards and procedures	X	
14. Review and approve all recommended services, standards and procedures		X
15. Adhere to County Policies and Standards	X	
16. Develop, document and maintain Standards and Procedures Manual	X	
17. Approve Standards and Procedures Manual		X
18. Provide the Standards and Procedures Manual electronically (and in a manner such that it can be accessed via the Service Portal	X	
19. Communicate to all End-Users the availability of and methodology for accessing the Standards and Procedures Manual	X	
20. Develop Demand Management Report (DMR), which shall include forecasts of expected changes in Services demand		X
21. Review and analyze DMR	X	
22. Provide input to demand forecasts for DMR	X	
23. Develop response to demands in the DMR	X	
24. Develop and provide action plans as a result of review of DMR	X	
25. Approve DMR action plans		X
<b>Contract Management</b>	<b>Contractor</b>	<b>County</b>
26. Monitor contract terms, technology operations and management processes to ensure compliance		X
27. Monitor and revise contracts as applicable and review recommended contract modifications provided by the other party		X
28. Monitor and revise contracts as applicable and review recommended contract modifications provided by the other party	X	
29. Provide data required to assess fee reductions and incentives	X	
30. Identify and manage Contractor fee reductions, based on performance information and contract terms		X
31. Approve changes		X
32. Implement changes	X	

Relationship Management Roles and Responsibilities		
33. Conduct regularly reviews of the risk exposure of the relationship and overall transaction between County and Contractor using a framework, which includes without limitation: <ul style="list-style-type: none"> <li>• Security audit including access rights</li> <li>• Quality of service delivery</li> <li>• Delayed service delivery</li> <li>• Business continuity and disaster recovery</li> <li>• Non-performance or inability to deliver Services</li> <li>• Quality of the 'Relationship'</li> </ul>		X
34. Participate in regular reviews of the risk exposure of the relationship and overall transaction between County and Contractor	X	
<b>Relationship Management</b>	<b>Contractor</b>	<b>County</b>
35. Provide support and commitment of County executives to the relationship		X
36. Provide support and commitment of Contractor executives to the relationship	X	
<b>Financial Management</b>	<b>Contractor</b>	<b>County</b>
37. Establish, maintain and ensure an asset register for all assets relevant to the Services is being managed	X	
38. Establish, maintain and ensure a contract register for all contracts relevant to the Services is being managed	X	
39. Review asset register and contract register		X
40. Provide Contractor data to a third-party benchmarking vendor for use in conducting periodic cost and performance benchmark comparison upon request	X	
41. Monitor and manage financial administration practices and procedures associated with the Agreement		X
42. Provide data in order to conduct charge back per County requirements	X	
43. Identify billing disparities and work with Contractor to identify corrective actions		X
44. Implement corrective actions for billing disparities	X	
45. Provide a monthly report of Services consumed and any variances to plan	X	
46. Maintain an audit trail and records of all costs incurred under the Agreement and net book value for assets	X	

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Relationship Management Roles and Responsibilities		
47. Proactively ensure that all unnecessary costs are eliminated, and that costs are managed in an efficient manner	X	
48. Approve all cost controls		X
49. Maintain full records of assets (including ownership) used to support the delivery of Services under the Agreement and upon request, make such records available to County for review	X	
<b>Service Level Management</b>	<b>Contractor</b>	<b>County</b>
50. Manage and coordinate all delivery aspects of the Services	X	
51. Provide periodic written performance management reports to County on Service Levels (SLs) and conduct periodic scheduled and ad hoc review meetings as required	X	
52. Review and monitor Contractor performance against SLs, return-on-investment metrics, performance improvement plans and industry benchmarks		X
53. Ensure Contractor understanding of and adherence to SLs and any implementations of required changes to achieve such SLs	X	
54. Ensure in-scope technical solutions are consistent with County's business strategy and architecture	X	
55. Ensure Contractor performance meets business requirements	X	
56. Conduct a formal review and report on root causes of service delivery or other relationship related matters, and document such findings	X	
<b>Resource Management</b>	<b>Contractor</b>	<b>County</b>
57. Ensure that staffing, technology and skill levels are adequate to achieve contract objectives	X	
58. Inform County of any potential Key Personnel staffing changes and of any new personnel assignments planned for new projects and Services	X	
59. Review and authorize Key Personnel changes to existing Services and personnel for new projects and Services		X
60. Define any constraints for the use of subcontractors		X
61. Provide Contractor staff turnover data when requested by County	X	
62. Provide monthly an updated contractor organization chart related to roles supporting and/or delivering Service to the County	X	
<b>Integration Management</b>	<b>Contractor</b>	<b>County</b>

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Relationship Management Roles and Responsibilities		
63. Provide information on integration requirements		X
64. Define integration solutions	X	
65. Approve integration solutions		X
66. Develop Operating Level Agreements (OLAs) between third-party Entities and Contractor if other third-party Contractors of Services are providing services that integrate or impact upon those defined in the Agreement	X	
<b>Customer Satisfaction Management</b>	<b>Contractor</b>	<b>County</b>
67. Provide periodic written performance management reports to County on SLs and conduct periodic scheduled and ad-hoc review meetings as required	X	
68. Conduct customer satisfaction survey	X	
69. Participate in and review customer satisfaction survey		X

**END OF SCHEDULE**