

**Master City of San José Consultant Agreement
Approved Service Order
(Non-Capital Projects)**

Cover Page

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- 1a.** Intentionally Omitted **1b.** AC Contract No.: 663402
- 2.** Approved Service Order No. 26
- 3.** Consultant's Name: Alliance Resource Consulting, LLC. ("Consultant")
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- 4.** Project Name: Director of Finance Recruitment ("Project")
- 5.** Project Location: City of San Jose (City Hall), San Jose, CA
- 6.** The Consultant and the City will implement this Approved Service Order in accordance with the Master Agreement, this cover page and Attachments "A" (Tasks), "B" (Terms and Conditions), and "C" (Compensation Table), which are incorporated herein by references.
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7. Budget/Fiscal:

a. Current unencumbered amount in Master Agreement:	\$	169,500
b. Maximum Service Order Compensation for this Approved Service Order:	\$	36,000
c. New unencumbered balance in Master Agreement (7.a – 7.b):	\$	133,500

- d. **Appropriation Certification:** I certify that an unexpended appropriation in the amount of the Maximum Service Order Compensation is available in the following fund(s) and that such fund(s) will be **001-49-000010-4052** encumbered to pay for this Approved Service Order.

Fund: <u>001</u>	Appn: <u>0491</u>	RC: <u>49-000010-4052</u>	Amount: \$ <u>36,000</u>
Fund: _____	Appn: _____	RC: _____	Amount: \$ _____
Fund: _____	A _____	RC: _____	Amount: \$ _____

Authorized Signature: _____

Margarita Carrazco

Date: _____

Email: margarita.carrazco@sanjoseca.gov
Date: 11/01/2022 GMT

8. Division Analyst Approval:

Sarah Steele

*Email: sarah.steele@sanjoseca.gov
Date: 11/01/2022 GMT

9. Consultant Approval:

Suzanne Uyeda

Email: suyeda@alliancerc.com
Date: 11/01/2022 GMT

10. Approval as to Form (City Attorney):

- Service Order Form Approved by the Office of the City Attorney
(Maximum Service Order Compensation is \$100,000 or less, and the provisions of the service order form are not altered.)
- Approved as to Form:

11. City Director Approval:

Jennifer Schembri

Email: jennifer.schembri@sanjoseca.gov
Date: 11/01/2022 GMT

Attachment A: Tasks

The Consultant shall provide the services and deliverables set forth in this **Attachment A**. The Consultant shall provide all services and deliverables required by this **Attachment A** to the satisfaction of the City's contract manager.

General Description of Project for which Consultant will Provide Services: The Consultant will provide executive recruitment services for one (1) Director of Finance.

Task No. 1: Recruitment

A. **Services:**

- a. CONSULTANT shall:
 - i. Develop a candidate profile, position description and applicant qualifications based on information provided by CITY.
 - ii. The candidate profile, position description, and applicant qualifications will be used as the basis for the solicitation of potential candidates.
- b. CONSULTANT shall:
 - i. Prepare a recruitment brochure for the position and present the draft to CITY for review and approval prior to printing; and
 - ii. Develop advertisements and place the advertisements for publication in magazines, journals, newsletters, websites, job bulletins, and resources deemed appropriate by CONSULTANT.
- c. CONSULTANT shall:
 - i. Send invites to target list of individuals.
 - ii. Make direct contact with targeted individuals in comparable organizations at the appropriate level. These invitations will be followed up with direct phone calls to potential candidates to gauge interest.
 - iii. Attract top candidates both locally and nationwide who best satisfy the requirements and qualifications of the position through fair and effective solicitations.
 - iv. Advertise and provide outreach to engage a diverse candidate pool.
 - v. Execute a direct mail campaign for the position by distributing copies of the recruitment brochure to a targeted audience and key professional associations.
 - vi. Select quality candidates for consideration from past CONSULTANT searches.

B. Deliverable: The Consultant will provide the following to the City's Contract Manager: Consultant will prepare a recruitment brochure, place advertisements and send invites to target list of individuals.

C. Completion Time: The Consultant must complete the services and deliverables for this task in accordance with whichever one of the following time is marked:

- On or before the following date: _____.
- On or before November 2, 2022.

Task No. 2: Candidate Evaluation

A. Services: The Consultant will complete a screening and assessment process which includes:

- a) Review, acknowledge and evaluate all resumes and other supporting materials received from all candidates.
- b) Screen applications using standard methods, including verification of credentials, qualifications, and ranking recommendations; and evaluate candidates against the approved candidates profile, position description, and applicant qualifications.
- c) Identify the most promising candidates for the position, based on the position profile, and CONSULTANT shall conduct preliminary screening interviews and background checks with those candidates, To the extent possible, CONSULTANT shall conduct screening interviews in person.
- d) Prepare a client report for the City that contains a summary of the results of the recruitment process and recommends the candidates whose backgrounds and experiences closely match the requirements of the position, which will include a profile of each candidate's experience, skills assessment, and analysis of strengths and weaknesses.
- e) Meet with the CITY to review the client report and assist the CITY in selecting a group of five (5) to ten (10) finalists for the position for further evaluation.
- f) Design a selection process for the identified finalist candidates. CONSULTANT shall provide CITY with interviewing and selection tips, suggested interview questions and rating forms.
- g) Prepare all materials needed to conduct interviews and provide them to City prior to interview day for review and approval.
- h) Invites candidates for interview and provide candidates with all necessary instructions to prepare for the interview day.
- i) Attend the interviews and facilitate the interview process.
- j) Assist CITY in scheduling final candidates for interviews with the hiring manager.
- k) Organize and attend site visits along with designated City officials.

B. Deliverable: The Consultant will provide the following to the City's Contract Manager: Weekly client progress reports will be sent to the City and a final client summary report will be provided.

C. Completion Time: The Consultant must complete the services and deliverables for this task in accordance with whichever one of the following time is marked:

- On or before the following date: _____.
- On or before December 9, 2022.

Task No. 3: Completion of Reference/Background Checks and Position Closure

A. Services:

- a. CONSULTANT shall notify CITY that the candidates have been notified to move forward with references.
- b. CONSULTANT shall conduct reference checks of the top two (2) to four (4) candidates for the position as directed by CITY and obtain background checks from a licensed firm (including credit report, court records check, driving record, academic degree confirmation, and newspaper article search), as directed by CITY.

B. Deliverable: The Consultant will provide the following to the City's Contract Manager: Consultant shall conduct Reference and Background Checks and assist in each position closure.

C. Completion Time: The Consultant must complete the services and deliverables for this task in accordance with whichever one of the following time is marked:

- On or before the following date: _____.
- On or before December 21, 2022.

Attachment B: Terms and Conditions

1. **City's Contract Manager:** The City's contract manager for this Approved Service Order is:

Name: Sarah Steele	Phone No.: 408-535-8158
Department: City Manager's Office of Relations	Email: sarah.steele@sanjoseca.gov
Address: 200 E. Santa Clara Street, Wing 3 rd , San Jose, CA 95113	

2. **Consultant's Contract Manager and Other Staffing:** Identified below are the following: (a) the Consultant's contract manager for this Approved Service Order, and (b) the Consultant(s) and/or employee(s) of the Consultant who will be principally responsible for providing the services and deliverables. ***If an individual identified below does not have a current Form 700 on file with the City Clerk for a separate agreement with the City, and is required to file a Form 700, the Consultant must comply with the requirements of Subsection 17.2 of the Master Agreement, entitled "Filing Form 700."***

		<u>Required to File Form 700?</u>		
		Yes Already Filed (Date Filed)	Yes Need to File	No
<u>Consultant's Contract Manager</u>				
Name: Sherrill Uyeda	Phone No.: 562-901-0769			<u>X</u>
Address: 1 Centerpointe Drive, Suit3 440, La Palma, CA 90623	Email: suyeda@alliancerc.com			
<u>Other Staffing</u>				
<u>Name:</u>	<u>Assignment:</u>	<u>Email:</u>		
1.				
2.				
3.				

3. Subconsultants: Whichever of the following is marked applies to this Approved Service Order:

- The Consultant can **not** use any subconsultants.
- The Consultant can use the following subconsultants to assist in providing the required services and deliverables:

<u>Subconsultant's Name</u>	<u>Area of Work</u>
1.	
2.	
3.	

4. Reimbursable Expenses: If the Compensation Table set forth in **Attachment C** of this Approved Service Order states that the City will reimburse the Consultant for expenses, then only the expenses identified in Subsection 10.5.3 of the Master Agreement are Reimbursable Expenses unless the following box is marked and additional reimbursable expenses are set forth:

- In addition to the expenses identified in Subsection 10.5.3 of the Master Agreement, the following expenses are Reimbursable Expenses:

<u>Additional Reimbursable Expense(s)</u>	<u>Mark-up</u>
1. _____	_____
2. _____	_____
3. _____	_____

Notwithstanding the foregoing, any additional reimbursable expense(s) set forth in the above table will be disregarded if the Compensation Table states that the City will *not* reimburse the Consultant for any expenses.

Attachment C: Compensation Table

The City will compensate the Consultant for providing the services and deliverables set forth in **Attachment A** in accordance this Compensation Table. This Compensation Table is subject to the terms and conditions set forth in the Master Agreement, including without limitation Section 10 of the Master Agreement.

Part 1 – Compensation for Services and Deliverables			
Column 1	Column 2	Column 3	Column 4
Task Nos. from Attachment A	Basis of Compensation	Invoice Period	Compensation
Due at start of meeting	<input type="checkbox"/> Time & Materials <input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly <input checked="" type="checkbox"/> Completion of Task(s) <input type="checkbox"/> Completion of Work	\$9,000
1	<input type="checkbox"/> Time & Materials <input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly <input checked="" type="checkbox"/> Completion of Task(s) <input type="checkbox"/> Completion of Work	\$9,000
2	<input type="checkbox"/> Time & Materials <input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly <input checked="" type="checkbox"/> Completion of Task(s) <input type="checkbox"/> Completion of Work	\$9,000
3	<input type="checkbox"/> Time & Materials <input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly <input checked="" type="checkbox"/> Completion of Task(s) <input type="checkbox"/> Completion of Work	\$9,000
Part 2 – Reimbursable Expenses			
<input checked="" type="checkbox"/> No expenses are separately reimbursable. The amount(s) in Column 4 of Part 1 include(s) payment for all expenses.		<input type="checkbox"/> Expenses are separately reimbursable in the maximum amount of:	\$0
Part 3 – Subconsultant Costs			
<input checked="" type="checkbox"/> Subconsultant costs are <i>not</i> separately compensable. The amount(s) in Column 4 of Part 1 include(s) subconsultant costs.		<input type="checkbox"/> Subconsultant costs are separately compensable in the maximum amount of:	\$0
Maximum Service Order Compensation (sum of Parts 1 through 3):			\$ 36,000