

## Attachment 1

### FUSE CORPS INDIVIDUAL PLACEMENT AGREEMENT

Host Agency: San José Department of Planning, Building and Code Enforcement  
Fellow Reports to: Alex Powell, Chief of Staff  
Department of Planning, Building and Code Enforcement (PBCE)  
Location of Fellowship: 200 E. Santa Clara St. San José, CA 95113  
Project Title: Optimizing Building Permitting Process

#### General Terms and Conditions between the City and FUSE

The City department executing this Individual Placement Agreement and FUSE Corps (FUSE) acknowledge that the terms and conditions of the Master Placement Agreement, contract #664547, apply to the City department and FUSE as it relates to the performance of this Individual Placement Agreement. FUSE and the City department shall notify the San José City Manager's Office upon execution of this Individual Placement Agreement.

#### Illustrative Services Provided by FUSE

##### **1. Prior to the start of the fellowship year:**

- **Project Development:** Convene meetings with host agency officials to identify project priorities; conduct in-depth interviews with host agency officials to clarify project idea; develop a draft Project Description for review by host agency officials; and conduct rounds of edits as needed to finalize approval of the Description.
- **Recruitment:** Conduct a local and national candidate search, cultivating applicants from various job boards, associations, and networks; respond to inquiries from interested applicants seeking additional information; and manage an online application portal and a candidate management system.
- **Screening:** Review applications to determine the most appropriate next steps for each candidate; conduct an initial phone-screening interview with candidates deemed to be most promising for the role; conduct an additional follow-up video-interview with candidates deemed strong enough to reach the semi-finalist round.
- **Selection:** Select up to three finalists for each project and collect electronic references on those individuals from current and former employers and colleagues; help the City to coordinate logistics for an in-person interview for each of the three finalists with designated host agency officials.
- **On-Boarding:** Place the selected individual under agreement as an independent contractor of FUSE dedicated to the specified project; communicate with both fellow and host agency officials in the weeks leading up to the start of the program year to help prepare all parties for the fellowship.

- **Orientation:** Organize and facilitate a national, in-person orientation for new fellows that is designed to help prepare them for their year of service, introduce them to the program's various tools and techniques, build peer-to-peer connections to help create an interactive 'community of practice' among all fellows and alumni; and cover the costs of travel, accommodations, meals, facilitates, speakers, and expenses for fellow to attend orientation week.

## 2. **During the fellowship year:**

- **Coaching:** Pair fellow with an executive coach who will be available to work one-on-one with the fellow during the year.
- **On-Going Support:** Organize and facilitate seminar calls hosted by staff, alumni, industry experts, and others to provide ongoing development and skill building opportunities. Host an online communication platform to allow fellows to regularly ask questions of peers and FUSE staff as they pursue project goals.
- **Project Refinement:** Schedule a call with the fellow, host agency officials, and FUSE staff within the first three months of the project to assess the extent to which any changes may be necessary to the Project Description and designated fellowship project goals.
- **Mid-Year Retreat:** Organize and facilitate a national, in-person mid-year retreat for all fellows that is designed to review progress achieved and lessons learned to date, clarify plans for increasing impact during the second half of the fellowship year, build plans for sustaining the impact of the project following the conclusion of the fellowship, and continue to foster interactive 'community of practice' among all current fellows and alumni; and cover the costs of travel, accommodations, meals, facilitates, speakers, and expenses for fellow to attend the mid-year retreat.
- **Status Checks:** Check-in with fellows and host agency officials periodically throughout the term of the fellowship to ensure that the fellowship is on track to achieve its stated goals; conduct a formal survey of fellows and host agency officials at both the mid-year point and at the end of the fellowship year to determine progress achieved and lessons learned to date.

### **Fellowship Project Description:**

Starting in August 2021, the FUSE Executive Fellow will begin building deep relationships with a wide range of critical stakeholders, including staff across City departments, community-based organizations, neighborhood councils, and a range of permitting and code enforcement customers, including residents in traditionally underserved neighborhoods, particularly homeowners and renters, affordable housing developers, and formerly cited individuals. By engaging with community members and customers, the Executive Fellow will develop a deep understanding of challenges and opportunities. Utilizing this initial listening tour with key stakeholders, the Executive Fellow will assess the department's permit center and code enforcement processes and customer services.

Following a comprehensive understanding of these existing processes, the Executive Fellow will continue to connect directly with customers, including residents, affordable housing developers and other stakeholders, and build off of existing data sources to thoughtfully identify structures, processes, and information gaps that limit or create barriers to accessing services. The Executive Fellow will hone in on the root causes of unequal access to services, probing on user experience, the affordability of services, lack of digital tools or connection, knowledge gaps in process requirements, and missing provisions for various language services. The Executive Fellow will also identify customer segments not currently served by the department. This assessment will then inform the development of recommendations that address the gaps identified and support process improvements that enable the department to meet the needs of these customers best. The recommendations should derive from stakeholder interviews, research from national best practices, and lessons learned from similar private sector activities.

The Executive Fellow will then initiate recommendations and activities that are most urgent and can be implemented quickly. This could include working closely with frontline staff responsible for the core operations of permitting and code enforcement to streamline requirements, minimize the cost of services, and simplify processes to build a more navigable system. This could also include building a resource guide for currently underserved or non-served residents, ensuring they are able to leverage department services and advocate for healthy environments through the code enforcement processes despite their citizenship status, financial means, or education level. The Executive Fellow should outline key performance metrics, identifying a data-driven approach to analyzing the impact of the improvements on customers across the city and broader affordable housing and homeownership goals – these indicators must be designed through an equity lens.

By June 2022, the Executive Fellow will have overseen the implementation of critical recommendations and identified a path to sustainable improvement. This will include the following:

- *Conduct a thorough review of the current landscape* – Conduct an in-depth landscape analysis of the permit center and code enforcement customer services and processes, collating all relevant policies and procedures; strengthen existing lines of communication between stakeholders, review national literature about permitting and code enforcement reform or innovations, and identify lessons from private-sector practices for excellent customer service.
- *Engage customers and analyze accessibility and user experience* – Connect with entire customer segment who utilize or could utilize permitting and code enforcement services, including residents in underserved neighborhoods, those in multi-family housing units, renters, homeowners, and housing developers; capture customer segments not currently served by the department or those who have stopped utilizing services, map gaps and identify cross-cutting themes, determine barriers to accessibility.
- *Form recommendations and catalyze buy-in* – Build out recommendations that address any gaps identified and support process improvements, design policy and process solutions for the department to meet the needs of customers best and to engage underserved or non-served populations, identify barriers to implementing any recommendations; solicit and incorporate input from stakeholders to build consensus around changes.
- *Roll-out recommendations and manage the implementation of urgent initiatives* – Oversee implementation of strategies considered low-hanging fruit, initiate quick wins like streamlining requirements, simplifying processes, or adding additional language services to forms and website; build out suite of services and resource guide for currently underserved or non-served residents, provide tools to leverage department services and advocate for healthy built

environments within their homes and buildings; identify and integrating relevant success metrics, setting benchmarks for tracking progress.

- *Support long-term implementation* – Work with leadership across the department to effectively advance recommendations, incorporate a phased rollout to build momentum and ensure a smooth transition for all stakeholders; support capacity building, creating internal infrastructure and systems and facilitate deep culture change; measure and broadly share progress towards goals, and ensure that the needs of customers are continually evaluated, centering racial, gender, and economic equity in all process-improvement strategies.

### **Fellow Support provided by the Placement:**

The Deputy City Manager, Rosalynn Hughey, and her staff will facilitate introductions and meetings with key staff within the City as well as elected officials as appropriate.

**Executive Sponsor:** The Executive Sponsor is a high-ranking member of the agency's management team. He or she is the visible champion of the project within the agency and is the ultimate decision maker, with final approval on all phases, deliverables and scope changes. The Executive Sponsor will help ensure that this project achieves its full potential for impact. The designated Executive Sponsor for this project is Rosalynn Hughey, Deputy City Manager.

**Project Supervisor:** The Project Supervisor is the day-to-day driver of the project and will work directly with the fellow to oversee progress toward goals. He or she will introduce the fellow to key stakeholders, resolve conflicts and remove obstacles that may occur during project work, and will sign off on approvals needed to advance each phase. The designated Project Supervisor for this project is Alex Powell, Chief of Staff, PBCE.

The City agrees to provide the Fellow with a dedicated workspace, a telephone, a computer, internet access, security access as appropriate, office supplies, and any other physical resources related to performance of the fellowship.

### **Financial Considerations Between the City and FUSE Corps regarding the Fellow:**

PBCE will provide no stipend to the Fellow in addition to that provided by FUSE.

During a Fellow's appointment, the City, at its sole discretion, may authorize and pay for all reasonable project-related expenses incurred by such Fellow in connection with the performance of services pursuant to the Placement Agreement for such Fellow including, without limitation, business expenses, travel expenses, and office supplies, all in accordance with the City's applicable policies and procedures.

PBCE will have no financial obligation for expenses related to duties required by FUSE, such as travel by the Fellow to FUSE trainings or events.

### **Financial Commitment Between the City and FUSE as it Relates to the Individual Placement for FUSE Fellow.**

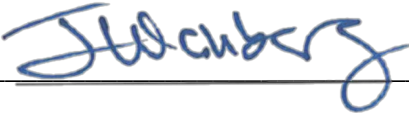
By executing this Individual Placement Agreement, PBCE notifies FUSE that PBCE has appropriated sufficient funds and taken all necessary steps to commit to the Placement and Funding Structure below. FUSE will submit invoices directly to PBCE for the two amounts listed below, the amount and timing of which are set forth for all departments in the City's Master Contract with FUSE.


Timeline	Placement and Funding Structure
May 1, 2021	Agreement between FUSE and City Department to host a fellow in the upcoming program year
July 26, 2021	Payment of initial half of \$150,000 total fee is due (\$75,000)
August 2, 2021	Fellows' first official day working onsite
January 26, 2022	Payment of second half of \$150,000 total fee is due (\$75,000)
June 24, 2022	Final day of work for Fellow

**IN WITNESS WHEREOF**, the parties hereto have caused this Agreement to be executed by their respective duly authorized officers as of the Effective Date.

**FUSE CORPS**

**CITY**

By: 

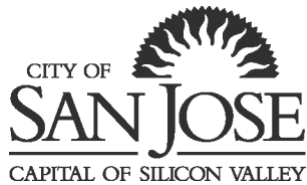
By: 

Name: James Weinberg  
Title: Chief Executive Officer

Name: Sarah Zarate  
Title: Director, Office of the City Manager,  
San José

Date: 7/15/2021

Date: 7/13/21



- FOR YOUR ELECTRONIC SIGNATURE
- FULLY EXECUTED COPY TO FOLLOW

CITY STAFF: Alexander Powell  
STAFF EMAIL: Alex.powell@sanjoseca.gov

## SCANNED SIGNATURE AUTHORIZATION

DATE: 7/15/2021 TOTAL PAGES: (INCLUDING THIS PAGE) 1

CONSULTANT NAME: James Weinberg, CEO, FUSE Corps  
EMAIL: james@fusecorps.org  
PHONE: 617-875-4655

I agree to use electronic signatures

SIGNATURE OF CONSULTANT: 

### DIRECTIONS:

REVIEW THE ENCLOSED DOCUMENT, IF IT IS ACCEPTABLE:

1. SIGN THE DOCUMENT
2. CHECK THE BOX BELOW YOUR NAME AND SIGN AGREEING TO THE USE OF ELECTRONIC SIGNATURES
3. SCAN YOUR EXECUTED DOCUMENT TOGETHER WITH THIS COVER PAGE **IN BLUE INK**
4. EMAIL THE ENTIRE DOCUMENT TO (CITY STAFF EMAIL ADDRESS): [Alex.powell@sanjoseca.gov](mailto:Alex.powell@sanjoseca.gov)

### TO BE COMPLETED BY CITY STAFF:

ALTERNATIVE METHODS OF VERIFICATION:

- USE OF A PASSWORD PROTECTED WEBSITE
- CONFIRMED BY A KNOWN TELEPHONE NUMBER / EMAIL
- PERSONALLY KNOWN TO CITY STAFF

# City of San José Contract/Agreement Transmittal Form

## Route Order

## Attached / Completed

## Electronically Signed

TO:  City Attorney  
 City Manager  
 City Clerk **OR** Return to  
Dept. (circle one)

Insurance Certificates / Waivers  Electronically Signed: Select one  
 Business Tax Certificate  Audit Trail Attached (if applicable)  
 Contacted Clerk re: Form 700  Scanned Signature Authorization  
 Supplemental Memorandums (if applicable): Select One

Type of Document: Existing Contract

Type of Contract: Professional Services

### REQUIRED INFORMATION FOR ALL CONTRACTS:

Existing GILES # 664553 -012

Contractor: FUSE Corps

Address: 235 MONTGOMERY ST., SUITE 1110

Phone: 617.875.4655

Email: james@fusecorps.org

Contract Description: The Master Agreement with Fuse Corps began in April 2019. The attached Individual Placement Agreement for PBCE is for \$150,000 under the Master Agreement.

Term Start Date: 07/26/2021

Term End Date: 06/30/2022

Extension: No

Method of Procurement: N/A

RFB, RFP or RFQ No.: \_\_\_\_\_

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

Agenda Date (if applicable): 02/05/2019

Agenda Item No.: 3.3

Resolution No.: 78970

Ordinance No.: \_\_\_\_\_

Original Contract Amount: \$2,850,000

Amount of Increase/Decrease: \$-150,000

Option #: \_\_\_ of \_\_\_ Option Amount: \_\_\_\_\_

Updated Contract Amount: 1,422,500

Fund/Appropriation: 237 -0584/0581

\$1,422,500

Form 700 Required: No

Revenue Agreement: No

Business Tax Certificate No.: \_\_\_\_\_

Expiration Date: 6/30/2022

Department: PBCE (58)

Department Contact Name/Phone: Alexander Powell - 408-535-1258

Notes:

Department Director Signature: \_\_\_\_\_



1/5/2022

Date

Office of the City Manager Signature: Jessica Lowry 7/13/21

Date