

**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.: 665615
- 2.** Approved Service Order No. 3
- 3.** Consultant's Name: Practical Productivity Solutions DBA PRODUCTIVITY PEOPLE Inc.
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- 4.** Project Name: Leadership Skills and Strategies
- 5.** Project Location: Virtual Training
- 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:	\$	308,440
b. Maximum Service Order Compensation for this Approved Service Order:	\$	\$1,400
c. New unencumbered balance in Master Agreement (7.a – 7.b):	\$	307,040

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) from 446 76 700760 4045 and 513 76 700760 4045 will be encumbered to pay for this Approved Service Order.

Fund: 446 Appn: 0762 RC: 76700760 Amount: \$700

Fund: 513 Appn: 0762 RC: 76700760 Amount: \$700

Authorized Signature: _____



Email: carrie.rank@sanjoseca.gov

Date: _____

8. Division Analyst Approval:



Email: robert.hernandez@sanjoseca.gov

Date: _____

9. Consultant Approval:



Email: sue@productivitypeople.com

Date: _____

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: _____ Date: _____
(Sr.) Deputy City Attorney

11. City Director Approval:

Jennifer Schembri
Email: jennifer.schembri@sanjoseca.gov

Date: _____

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: PRODUCTIVITY PEOPLE will support the City with consulting services for City employees by offering a training course. The program curriculum has been designed to address methods through which staff will be trained in leadership skills and strategies. This proposal is submitted under the **Master Agreement, Section 1.1.1 Training and Organizational Development Services**

Task No. 1: Workshop 1 of 2 Leadership skills and strategies

A. Services: The consultant will support the City with a Leadership Training and provide an evaluation of the program to identify areas for improvement.

B. Deliverable: The consultant will:

- Facilitate one - 2-hour training
- This leadership training will address the following:
 - Learn leadership competencies.
 - Learn and apply leadership skills

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: ___ June 30, 2022_____.

On or before ___ Business Days from _____. [Fill in the second box if completion time for the task is contingent on completion of the prior task or an event.]

Task No.2 : Workshop 2 of 2 Leadership skills and strategies

A. Services: The consultant will support the City with a Leadership Training and provide an evaluation of the program to identify areas for improvement.

B. Deliverable: The consultant will:

- Facilitate one - 2-hour training
- This leadership training will address the following:
 - Learn leadership competencies.
 - Learn and apply leadership skills

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: ___ June 30, 2022_____.

On or before ____ Business Days from _____. [Fill in the second box if completion time for the task is contingent on completion of the prior task or an event.]

Attachment B: Terms and Conditions

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

Name: Carrie Rank	Phone No.: (408) 975-1486
Department: HR	E-mail: Carrie.rank@sanjoseca.gov
Address: 200 E. Santa Clara Street, 4 th Floor 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: Sue Brenner	Phone No.: (408) 613-1051			X
Address: 7960B Soquel Dr. #225 Aptos, California 95003	E-mail: sue@productivitypeople.com			
<u>Other Staffing</u>				
<u>Name:</u>	<u>Assignment:</u>			
1.				

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
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	\$700
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	\$700
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 not 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):			\$1,400