

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

Cover Page

1a. Intentionally Omitted **1b.** AC Contract No.: 665626

2. Approved Service Order No. 7

3. Consultant's Name: Civic Makers LLC

4. Project Name: Storytelling Training

5. Project Location: 200 E. Santa Clara Street, San Jose, CA 95113 (Virtual)

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.

7. Budget/Fiscal:

a. Current unencumbered amount in Master Agreement:	\$	210,012.50
b. Maximum Service Order Compensation for this Approved Service Order:	\$	7,025.00
c. New unencumbered balance in Master Agreement (7.a – 7.b):	\$	202,987.50

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) from **001-48-400120-4052** will be encumbered to pay for this Approved Service Order.

Fund: 001_____	Appn: 48_____	RC: 400120_____	Amount: \$7,025_____
Fund: _____	Appn: _____	RC: _____	Amount: \$_____
Fund: _____	Appn: _____	RC: _____	Amount: \$_____

Authorized Signature:

Carrie Rank

Carrie Rank (10/12/2021)

Email: carrie.rank@sanjoseca.gov

Date: _____

8. Division Analyst Approval:



Manpreet Sra (10/8/2021)

Email: manpreet.sra@sanjoseca.gov

Date: _____

9. Consultant Approval:

Judi Brown

Judith Lynn Brown

judi@civicmakers.com (10/8/2021)

Email: judi@civicmakers.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

Date: _____

Jennifer Schembri
Jennifer Schembri (10/12/2021)
Email: jennifer.schembri@sanjoseca.gov

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: Civic Makers LLC will support the City with consulting services for City employees by offering training courses. The training curriculum has been designed to address methods through which participants will learn storytelling and presentation skills. This proposal is submitted under the **Master Agreement, Section 1.1.1 Training and Organizational Development Services**

Task No. 1: Training Course Design not to exceed \$3,600 at \$150 per hour

- A. Services:** The consultant will support the City with Storytelling training and an evaluation of the training to identify areas for improvement.
- B. Deliverable:** The consultant will:
- 1) Create training content to meet needs of the training and its participants.
- 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: Conduct storytelling training over 1 session (3 hours) at \$175 per hour, not to exceed \$525.

- A. Services:** The consultant will support the City with a storytelling training and an evaluation of the training to identify areas for improvement.
- B. Deliverable:** The consultant will:
- 1) Deliver storytelling training. Session length recommendation is **one 3-hour** for up to **30** people
 - (i) (a) Understand best practices in storytelling, (b) understand considerations for audience, and (c) pitching an idea
 - (ii) Apply effective visual presentation practices
 - (iii) Apply best practices in public speaking and design of a presentation
 - (iv) Practice effective online/remote presentation skills
 - 2) Conduct a modest evaluation of session, in collaboration with the City, to determine areas for improvement and assess overall effectiveness.
- 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. 3: Conduct storytelling training over 2 sessions (2 hours) at \$175 per hour, not to exceed \$700.

- D. Services:** The consultant will support the City with a storytelling training and an evaluation of the training to identify areas for improvement.
- E. Deliverable:** The consultant will:
- 3) Work with employees to practice presentation skills and apply the knowledge learned on Day 1 of the training. Session length recommendation is **two (2-hour each)** for up to **30** people
 - a) Design and present a presentation
 - b) Present to half of the cohort while the audience and facilitator give feedback
 - c) Wrap up and evaluations
- F. 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. 4: Evaluation not to exceed \$450 at \$150 per hour

- A. Services:** The consultant will support the City with a storytelling training and an evaluation of the training to identify areas for improvement.
- B. Deliverable:** The consultant will:
- 1) Provide a training evaluation and recommendations for the future
 - 2) Training Evaluation methods include:
 - a. Debrief with participants in person (“plus/delta” exercise)
 - b. Evaluation Form at the end of the training
- 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. 5: Attend meetings related to course design not to exceed \$250 at \$125 per hour

- A. **Services:** The consultant will support the City with a storytelling training and an evaluation of the training to identify areas for improvement.
- B. **Deliverable:** The consultant will:
- 1) Attend ongoing meetings with project team, project management tasks, and communications.
 - 2) Ensure program objectives are met
 - 3) Provide program customization
- 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. 6: Additional coaching at \$150 per hour, not to exceed \$1,500

- C. **Services:** The consultant will support the City with a storytelling training and an evaluation of the training to identify areas for improvement.
- D. **Deliverable:** The consultant will:
- 1) Provide additional coaching to participants in between sessions
 - 2) Conduct ongoing meetings with project team, project management tasks, invoicing & communications management
 - 3) Ensure program objectives are met
- 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: Judi Brown	Phone No.: 415.819.8495			X
Address: 1145 Guerrero St. San Francisco, CA 94110	E-mail: judi@civickmakers.com			
<u>Other Staffing</u>				
<u>Name:</u>	<u>Assignment:</u>			
1.				
2.				

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 checked="" type="checkbox"/> Time & Materials	<input type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$3,600
2-3	<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	\$1,225
4	<input checked="" type="checkbox"/> Time & Materials	<input type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$450
5	<input checked="" type="checkbox"/> Time & Materials	<input type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$250
6	<input checked="" type="checkbox"/> Time & Materials	<input type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$1,500
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:			\$0.00
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:			\$0.00
Maximum Service Order Compensation (sum of Parts 1 through 3):						\$7,025