

**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.: 665704

**2.** Approved Service Order No. 5

**3.** Consultant's Name: Aim Training Solutions dba Motivaim

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**4.** Project Name: Word Training

**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 <b>unencumbered</b> amount in Master Agreement:	\$	304,200
b. <b>Maximum Service Order Compensation for this Approved Service Order:</b>	\$	5,775
c. New unencumbered balance in Master Agreement (7.a – 7.b):	\$	298,425

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: <b>\$5,775</b>
Fund: _____	Appn: _____	RC: _____	Amount: \$ _____
Fund: _____	Appn: _____	RC: _____	Amount: \$ _____

**Authorized Signature:** \_\_\_\_\_ Date: \_\_\_\_\_

  
Email: carrie.rank@sanjoseca.gov

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**8. Division Analyst Approval:** \_\_\_\_\_ Date: \_\_\_\_\_

  
Email: janet.medlin@sanjoseca.gov

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**9. Consultant Approval:** \_\_\_\_\_ Date: \_\_\_\_\_

  
Email: elie@motivaim.com

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**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:**

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

*Jennifer Schembri*

Email: [jennifer.schembri@sanjoseca.gov](mailto:jennifer.schembri@sanjoseca.gov)

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## 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.

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**General Description of Project for which Consultant will Provide Services:** Motivaim will provide the knowledge needed to use Word. City employees will learn the foundational knowledge of Word. They will be able to create professional documents using Word with the skills provided by Motivaim.

### Master Agreement, Section 1.1.1 Training and Organizational Development Services

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#### Task No. 1 of 5: Attend meetings to discuss the design of the training not to exceed 1 hour at \$175 per hour

- A. **Services:** The consultant will support the City by attending meetings to discuss the design of Word training not to exceed 1 hour at \$175 per hour for a total of \$175.
- B. **Deliverable:** The consultant will:
- Meet with HR staff to discuss the design 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. 2 of 5: Course Customization: Word training not to exceed 4 hours at \$150 per hour

- A. **Services:** The consultant will support the City by customizing a Word training not to exceed 4 hours at \$150 per hour for a total of \$600.
- B. **Deliverable:** The consultant will:
- Design and develop curriculum for a Word 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. 3 of 5: Word 2016 Level 1 Training**

**A. Services:** The consultant will support the City by delivering Word Training.

**B. Deliverable:** The consultant will:

- Deliver **1 session**. Length recommendation is 2.0 hours per session.
- Each session can accommodate up to 22 staff.
- Teach the following skills and tools to help City of San Jose employees:
  - Navigate and perform common tasks on Word, such as opening, viewing, editing, saving, and printing documents, and configuring the application
  - Format text and paragraphs
  - Perform repetitive operations efficiently using tools such as Find and Replace, Format Painter, and Styles
  - Enhance lists by sorting, renumbering, and customizing list styles
  - Create and format tables
  - Insert graphic objects into a document, including symbols, special characters, illustrations, pictures, and clip art.
  - Format the overall appearance of a page through page borders and colors, watermarks, headers and footers, and page layout
  - Use Word features to help identify and correct problems with spelling, grammar, readability, and accessibility

**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. 4 of 5: Word 2016 Level 2 Training**

**A. Services:** The consultant will support the City by delivering Excel Training

**B. Deliverable:** The consultant will:

- Deliver **1 session**. Length recommendation is 2.0 hours per session.
- Each session can accommodate up to 22 staff.
- Teach the following skills and tools to help City of San Jose employees:
  - Organize content using tables and charts
  - Customize formats using styles and themes
  - Insert content using quick parts
  - Use templates to automate document formatting
  - Control the flow of a document
  - Simplify and manage a long document
  - Use mail merge to create letters, envelopes, and labels

**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 of 5: Word 2016 Level 3 Training**

**A. Services:** The consultant will support the City by delivering Excel Training

**B. Deliverable:** The consultant will:

- Deliver **1 session**. Length recommendation is 2.0 hours per session.
- Each session can accommodate up to 22 staff.
- Teach the following skills and tools to help City of San Jose employees:
  - Easily manipulate images
  - Use custom graphic elements
  - Collaborate on documents
  - Add documents references and links
  - Securing a document
  - Using forms to manage content
  - Automating repetitive tasks with macros

**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 <sup>th</sup> 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
<b><u>Consultant's Contract Manager</u></b>				
Name: Elie Habib	Phone No.: 408-229-3326			X
Address: 2025 Gateway Place, #390 San Jose, CA 95110	E-mail: Elie@motivaim.com			
<b><u>Other Staffing</u></b>				
<u>Name:</u>	<u>Assignment:</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 with 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	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	\$175	
2	<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	\$600	
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	\$1,600	
4	<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	\$1,600	
5	<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	\$1,800	
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 <b>not</b> 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
<b>Maximum Service Order Compensation (sum of Parts 1 through 3):</b>						
\$5,775						