

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.: 666183
- 2.** Approved Service Order No. 8
- 3.** Consultant's Name: Learnit Inc.
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- 4.** Project Name: Change Management
- 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:	\$	130,212.50
b. Maximum Service Order Compensation for this Approved Service Order:	\$	43,975
c. New unencumbered balance in Master Agreement (7.a – 7.b):	\$	86,237.50

- 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 **001-41-008065-4052** will be encumbered to pay for this Approved Service Order.

Fund: 001	Appn: 41	RC: 008065	Amount: \$43,975
Fund: _____	Appn: _____	RC: _____	Amount: \$ _____
Fund: _____	Appn: _____	RC: _____	Amount: \$ _____

Date: _____

Authorized Signature: Carrie Rank


Carrie Rank (10/12/2021)
Email: carrie.rank@sanjoseca.gov

8. Division Analyst Approval: Janet Medlin Date: _____


Janet Medlin (10/12/2021)
Email: janet.medlin@sanjoseca.gov

9. Consultant Approval: Dalit Lewis Date: _____


dalit.lewis@learnit.com (10/11/2021)
Email: dalit.lewis@learnit.com

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:

(Sr.) Deputy City Attorney

Date: _____

11. City Director Approval:

Jennifer Schembri

Jennifer Schembri
Jennifer Schembri (10/12/2021)
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: Learn IT Inc. 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 participants will develop critical Change Management and Project skills. This proposal is submitted under the **Master Agreement, Section 1.1.1 Training and Organizational Development Services**

Task No. 1: Change Management – planning for the cohort not to exceed \$2,500 (\$250 an hour)

- A. **Services:** The consultant will support the City with a Change Management Academy and provide an evaluation of the program to identify areas for improvement.
- B. **Deliverable:** The consultant will:
- Spend up to 10 hours designing content and planning training including meeting with key stakeholders.
- 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: ____ December 31, 2021 ____.
- ☐ 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: Change Management – Introduction to Project Management & creating a project charter

- A. **Services:** The consultant will support the City with a Change Management Program and provide an evaluation of the program to identify areas for improvement.
- B. **Deliverable:** The consultant will:
- Deliver 1 session for up to 20 participants. Length recommendation is 2 hours per session.
 - Introduction to project management & creating a project charter
 - Conduct a modest evaluation of the Change Management Program, in collaboration with the City, to determine areas for improvement and assess overall effectiveness of the training
 - Provide recommendations to the City for further implementation
- 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: ____ December 31, 2021 ____.
- ☐ 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: Change Management – Understanding & Planning for Project Requirements

- A. Services:** The consultant will support the City with a Change Management Program and provide an evaluation of the program to identify areas for improvement.
- B. Deliverable:** The consultant will:
- Deliver 1 session for up to 20 participants. Length recommendation is 2 hours per session.
 - The importance of clearly understanding the scope during the planning phase of a project
 - Understand tools and techniques that will support how to accurately forecast the duration of a project and necessary resources (i.e., dollars and people)
 - Conduct a modest evaluation of the Change Management Program, in collaboration with the City, to determine areas for improvement and assess overall effectiveness of the training
 - Provide recommendations to the City for further implementation
- 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: ____ December 31, 2021_____.
- ☐ 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: Change Management – Change management is critical – an introduction

- A. Services:** The consultant will support the City with a Change Management Program and provide an evaluation of the program to identify areas for improvement.
- B. Deliverable:** The consultant will:
- Deliver 1 session for up to 20 participants. Length recommendation is 2 hours per session.
 - Change management is critical – an introduction
 - Conduct a modest evaluation of the Change Management Program, in collaboration with the City, to determine areas for improvement and assess overall effectiveness of the training
 - Provide recommendations to the City for further implementation
- 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: ____ December 31, 2021_____.
- ☐ 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: Change Management – Announcing change

- A. Services:** The consultant will support the City with a Change Management Program and provide an evaluation of the program to identify areas for improvement.
- B. Deliverable:** The consultant will:
- Deliver 1 session for up to 20 participants. Length recommendation is 2 hours per session.
 - Announcing Change
 - Conduct a modest evaluation of the Change Management Program, in collaboration with the City, to determine areas for improvement and assess overall effectiveness of the training
 - Provide recommendations to the City for further implementation
- 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: ____ December 31, 2021_____.
- ☐ 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: Change Management – Preparing for change

- A. Services:** The consultant will support the City with a Change Management Program and provide an evaluation of the program to identify areas for improvement.
- B. Deliverable:** The consultant will:
- Deliver 1 session for up to 20 participants. Length recommendation is 2 hours per session.
 - Preparing for Change
 - Conduct a modest evaluation of the Change Management Program, in collaboration with the City, to determine areas for improvement and assess overall effectiveness of the training
 - Provide recommendations to the City for further implementation
- 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: ____ December 31, 2021_____.
- ☐ 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. 7: Change Management – Supporting & reinforcing change

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

B. Deliverable: The consultant will:

- Deliver 1 session for up to 20 participants. Length recommendation is 2 hours per session.
 - Supporting and Reinforcing Change
- Conduct a modest evaluation of the Change Management Program, in collaboration with the City, to determine areas for improvement and assess overall effectiveness of the training
- Provide recommendations to the City for further implementation

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: ____ December 31, 2021_____.

☐ 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. 8: Change Management – Presentations

- A. **Services:** The consultant will support the City with a Change Management Program and provide an evaluation of the program to identify areas for improvement.
- B. **Deliverable:** The consultant will:
- Facilitate presentation session
 - Each person will present on their project
- 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: ____ December 31, 2021_____.

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. 9: Change Management – consulting services not to exceed \$5,500 (\$275 per hour)

- A. **Services:** The consultant will support the City with a Change Management Program and provide an evaluation of the program to identify areas for improvement.
- B. **Deliverable:** The consultant will:
- Provide up to 20 hours of consulting services to participants outside of the classroom
- 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: ____ December 31, 2021_____.

☐ 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. 10: Change Management – Project Management not to exceed \$1,500 (\$250 per hour)

- A. **Services:** The consultant will support the City with a Change Management Program and provide an evaluation of the program to identify areas for improvement.
- B. **Deliverable:** The consultant will:
- Provide up to 6-hours of support
 - Meeting with the City of San Jose HR/Training team to make improvements during the cohort execution
- 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: ____ December 31, 2021_____.

☐ 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. 11: Change Management – Additional participants not to exceed \$875 (\$175 per each staff)

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

B. Deliverable: The consultant will:

- Design training for additional participants at \$175/per person and not to exceed \$875.

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: ____ December 31, 2021_____.

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>Consultant's Contract Manager</u>	<u>Required to File Form 700?</u>		
	Yes Already Filed (Date Filed)	Yes Need to File	No

Name: Dalit Lewis	Phone No.: 415-946-6503			X
Address: 33 New Montgomery St #300, San Francisco, CA 94105	E-mail: dlewis@learnit.com			
<u>Other Staffing</u>				
<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 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	☒ Time & Materials	☐ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$2,500
2	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$4,800
3	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$4,800
4	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$4,800
5	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$4,800
6	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$4,800
7	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$4,800
8	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$4,800
9	☒ Time & Materials	☐ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$5,500
10	☒ Time & Materials	☐ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$1,500
11	☒ Time & Materials	☐ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$875
Part 2 – Reimbursable Expenses						

☐ No expenses are separately reimbursable. The amount(s) in Column 4 of Part 1 include(s) payment for all expenses.	☐ Expenses are separately reimbursable in the maximum amount of:
Part 3 – Subconsultant Costs	
☒ Subconsultant costs are not separately compensable. The amount(s) in Column 4 of Part 1 include(s) subconsultant costs.	☐ Subconsultant costs are separately compensable in the maximum amount of: \$0
Maximum Service Order Compensation (sum of Parts 1 through 3): \$43,975	