

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

Cover Page

1a. CPMS Contract No.: 9835 **1b.** AC Contract No.: AC31627

2. Approved Service Order No. 3

3. Consultant's Name: Worley Group, Inc. DBA Advisian, a Delaware corporation

4. Project Name: Microgrid Ranking for 36 Critical Sites Study -Additional Study

5. Project Location: City of San José

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:	\$	1,226,250
b. Maximum Service Order Compensation for this Approved Service Order:	\$	5,025
c. New unencumbered balance in Master Agreement (7.a – 7.b):	\$	1,221,225

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) will be encumbered to pay for this Approved Service Order.

Fund: 001 Appn: 417R RC: 205631 Amount: \$ 5,025

Fund: _____ Appn: _____ RC: _____ Amount: \$ _____

Fund: _____ Appn: _____ RC: _____ Amount: \$ _____

Authorized Signature: *Suzanne McPherson* Date: 09/22/2021

8. Division Analyst Approval: *[Signature]* Date: 9/22/2021

9. Consultant Approval: *[Signature]* Date: 09/17/2021

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.) Dept. City Attorney

11. City Director Approval: *[Signature]* Date: 9/20/2021

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:

Contractor will conduct a pre-feasibility study evaluating four top-ranked microgrid sites from Service Order 1, Microgrid Screening. Preliminary feasibility will include road mapping project development from pre-feasibility through solicitation and negotiations. The roadmap will include scope, interim steps and processes, recommendations, and estimated costs for each phase of development. This effort will also include a qualitative evaluation of benefits to the community during regular operating hours as well as during a power outage.

Task No. 1: Microgrid Roadmap

- A. Services:** Four projects selected as part of Service Order 1 will be preliminarily evaluated for microgrid/resilient facility development. Pre-feasibility evaluation will include recommendations for approach to each project individually or as a package to ensure the most economic and viable approach to project development through the solicitation and negotiation phase.
- B. Deliverable:** Microgrid development roadmap:
- Pre-feasibility roadmap by project including the following:
 - Outline of all phases of project development including approximate timelines and cost
 - Approaches for development – business models from self-built to third-party development and ownership
 - Scope of work draft for full solicitation-level feasibility study
 - Pre-feasibility for four sites
 - Likely DERs, potential layout and very rough order magnitude cost based on existing data collected in Service Order 1
- 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: October 21, 2021.
- On or before ____ Business Days from _____.

Task No. 2: Benefits Analysis

- A. Services:** Consultant will provide qualitative benefits analysis for the City based on two scenarios.
- B. Deliverable:** Qualitative benefits analysis
- Grid Connection: Evaluation of benefits expected DERs would provide during grid connection
 - Islanding: Evaluation of benefits expected DERs provide during outage conditions
- 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: October 30, 2021.
- On or before ____ Business Days from _____.

Attachment B: Terms and Conditions

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

Name: Huimin Mu	Phone No.: 408-535-6888
Department: Public Works	E-mail: huimin.mu@sanjoseca.gov
Address: 200 East Santa Clara Street, 6 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: Gary Leatherman	Phone No.: 2023691561			<input checked="" type="checkbox"/>
Address:	E-mail: gary.leatherman@advisian.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:

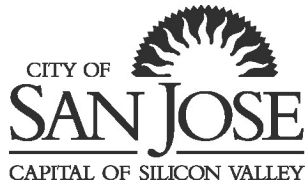
<u>Additional Reimbursable Expense(s)</u>	<u>Mark-up</u>
1. _____	_____
2. _____	_____
3. _____	_____

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	<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	\$3,500
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	\$1,525
	<input type="checkbox"/> Time & Materials <input type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly <input type="checkbox"/> Completion of Task(s) <input type="checkbox"/> Completion of Work	\$
	<input type="checkbox"/> Time & Materials <input type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly <input type="checkbox"/> Completion of Task(s) <input type="checkbox"/> Completion of Work	\$
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:	\$
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:	\$
Maximum Service Order Compensation (sum of Parts 1 through 3):			\$5,025



- FOR YOUR ELECTRONIC SIGNATURE
- FULLY EXECUTED COPY TO FOLLOW

CITY STAFF: Huimin Mu
STAFF EMAIL: Huimin.mu@sanjoseca.gov

SCANNED SIGNATURE AUTHORIZATION

DATE: 09/17/2021 TOTAL PAGES: (INCLUDING THIS PAGE) 1

CONSULTANT NAME: Naim Triki
EMAIL: Naim.Triki@advisian.com
PHONE: (916) 817-3978

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):

To BE COMPLETED BY 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: Yes
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: Service Order

Type of Contract: Consulting Services

REQUIRED INFORMATION FOR ALL CONTRACTS:

Existing GILES # 666568-003

Contractor: Worley Group, Inc. DBA Advisian, a Delaware Corporation

Address: 2330 East Bidwell St, Suite 120 Folsom CA 95630

Phone: 1-916-544-9251

Email: naim.triki@advisian.com

Contract Description: Service Order #3, Microgrid Ranking for 36 critical sites study-additional study.

Term Start Date: September 17, 2020 Term End Date: September 30, 2023 Extension: No

Method of Procurement: RFQ RFB, RFP or RFQ No.: _____ Date Conducted: _____

Agenda Date (if applicable): 9/1/2020 Agenda Item No.: 6.1

Resolution No.: _____ Ordinance No.: _____

Original Contract Amount: \$1,500,000 Amount of Increase/Decrease: _____

Option #: _____ of _____ Option Amount: _____ NTE/Updated Contract Amount: _____

Fund/Appropriation: _____

Form 700 Required (Selection mandatory for processing): N/A Revenue Agreement: Select one

Tax Certificate No.: 3197353900 Expiration Date: 8/15/2022

Department: Public Works (57)

Department Contact: Huimin Mu Customer (Finance Only): _____

Notes:

Department Director Signature: _____ Date

Office of the City Manager Signature: _____ Date

ALTERNATIVE METHODS OF VERIFICATION:

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