

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

Cover Page

1a. Intentionally Omitted **1b.** AC Contract No.: **AC 32155**

2. Approved Service Order No. **1**

3. Consultant's Name: **AgreeYa Solutions, Inc.**

4. Project Name: Santa Clara Regional Wastewater Facility Capital Improvement Program SharePoint Portal Development – Assessment and Discovery ("Project")

5. Project Location: Remote/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), and Exhibit "D" (Schedule of Specific Services) which are incorporated herein by references.

7. Budget/Fiscal:

a. Current unencumbered amount in Master Agreement:	\$	320,000
b. Maximum Service Order Compensation for this Approved Service Order:	\$	24,000
c. New unencumbered balance in Master Agreement (7.a – 7.b):	\$	296,000

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: 512 Amount: \$24,000

Harpal Singh

Email: harpal.singh@sanjoseca.gov

06/09/2022 GMT-07:00

Authorized Signature: _____ **Date:** _____

Mary Crippen

Email: mary.crippen@sanjoseca.gov

06/09/2022 GMT-07:00

8. Division Analyst Approval: _____ **Date:** _____

Ajay Kaul

Email: ajay.kaul@agreeya.com

06/08/2022

9. Consultant Approval: _____ **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:** _____

Garrett Dowgiallo

Email: garrett.dowgiallo@sanjoseca.gov

06/09/2022 GMT-07:00

11. City Director Approval: _____ **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:

The City of San José ("City") currently uses a SharePoint-based Capital Improvement Program (CIP) Portal ("CIP Portal"), including dashboards and reports, to track CIP projects at the San Jose Santa Clara Regional Wastewater Facility. Consultant shall assist the City with transitioning the CIP Portal to an in-house Office 365-based solution ("O365 Portal") that is optimized and operates on current technology. To prepare for this transition, Consultant shall conduct a detailed assessment on the current CIP Portal environment, collect applicable data, and verify the scope and assumptions for the transition to the O365 Portal.

Project start date shall begin within two weeks of this Service Order execution.

Task No. 1: Business Process Review and Analyses.

- A. Services:** Consultant will assess the CIP Portal business processes in accordance with the following services and obligations:
- Consultant will review the CIP Portal business processes for inefficiencies.
 - Consultant will identify strategies for streamlining and simplifying the O365 Portal business processes.
 - Consultant will report on unused content and functionality that can be utilized to improve the O365 Portal.
- B. Deliverable:** One workshop with the City to review the CIP Portal business processes, and identify strategies for streamlining and simplifying the O365 Portal.
- C. Completion Time:** The Consultant must complete the services and deliverable for this task in accordance with whichever one of the following time is marked:
- On or before the following date: _____.
- On or before 10 Business Days from project start date.**

Task No. 2: Content and Migration Assessments.

- A. Services:** Consultant will assess the CIP Portal migration requirements in accordance with the following services and obligations:
- Consultant will analyze the CIP Portal content quantity, complexity and validity through the use of reports, manual review, scripts, tools, and observation.
 - Consultant will run reports and perform analyses of the CIP Portal to assess the migration magnitude and identify any potential blockers/issues that may arise during the migration from the CIP Portal to the O365 Portal.
 - Consultant will review existing customizations to the CIP Portal and identify the best strategy for migrating the existing customizations to the O365 Portal.
- B. Deliverables:**
- Content assessment report – an inventory of all content discovered in the CIP Portal.
 - High level migration strategy for migrating from the CIP Portal to the O365 Portal.
 - One workshop with the City to present the content assessment report, high level migration strategy, and collect the City's feedback.
- C. Completion Time:** The Consultant must complete the services and deliverable for this task in accordance with whichever one of the following time is marked:
- On or before the following date: _____.
- On or before 16 Business Days from project start date.**

Task No. 3: Reporting Assessment.

- A. Services:** Consultant will assess the CIP Portal reports and dashboards in accordance with the following services and obligations:
- Consultant will perform a complete inventory of reports and dashboards in the CIP Portal, and assess the CIP Portal reporting systems for migration to the O365 Portal.
 - Consultant will assess the requirements and complexity of providing the inventory of reports and dashboards in the O365 Portal using Office365 reporting and dashboard tools.
- B. Deliverable:** Provide a detailed report and/or a wireframe/schematic which describes the recommended high level future state reporting strategy, and list of City-approved reports to be migrated to the O365 Portal.
- C. Completion Time:** The Consultant must complete the services and deliverable for this task in accordance with whichever one of the following time is marked:
- On or before the following date: _____.
- On or before 16 Business Days from project start date.**

Task No. 4: High-level conceptual architecture for the O365 Portal and develop an implementation plan.

A. Services: Consultant will prepare a high level conceptual design for the O365 Portal identifying core components and workflows, and create an implementation plan based on the outcome of Task No.'s 1-3.

B. Deliverable:

- Detailed report and/or wireframes/schematics describing the recommended high-level conceptual architecture for the O365 Portal.
- Implementation plan including a timeline of the proposed approach to migration (point of content migration, quality control of new system, user acceptance testing, go live, etc.)
- One workshop with City to review the conceptual architecture and implementation plan for the O365 Portal.

C. Completion Time: The Consultant must complete the services and deliverable for this task in accordance with whichever one of the following time is marked:

On or before the following date: _____.

On or before 21 Business Days from project start date.

Attachment B: Terms and Conditions

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

Name: Ekpa Akpan	Phone No.: 408-635-4028
Department: ESD	E-mail: ekpa.akpan@sanjoseca.gov
Address: 700 Los Esteros Road San José, CA 95134	

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: Ajay Kaul	Phone No.: 916-294-9900			X
Address: 605 Coolidge Drive Folsom, CA 95630	E-mail: Ajay.Kaul@agreeya.com			
<u>Other Staffing</u>				
Name:	Assignment:			
1. Robyn ReBell	Project Management / Business Analyst			X
2. Kimo Hardy	SharePoint Architect / Subject Matter Expert			X

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 & 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	\$9,600
3 & 4	<input type="checkbox"/> Time & Materials <input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly <input type="checkbox"/> Completion of Task(s) <input checked="" type="checkbox"/> Completion of Work	14,400
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):			\$24,000