

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

Cover Page

- 1a.** Intentionally Omitted **1b.** AC Contract No.: OC-000060
- 2.** Approved Service Order No. 3
- 3.** Consultant's Name: The Center for Advancing Leadership and Human Potential

- 4.** Project Name: Mentorship Recruitment Sessions
- 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.

- 7. Budget/Fiscal:**
- | | | |
|---|----|-----------|
| a. Current unencumbered amount in Master Agreement: | \$ | \$285,500 |
| b. Maximum Service Order Compensation for this Approved Service Order: | \$ | \$12,000 |
| c. New unencumbered balance in Master Agreement (7.a – 7.b): | \$ | 273,500 |
- 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: \$12,000
Fund: _____	Appn: _____	RC: _____	Amount: \$_____
Fund: _____	Appn: _____	RC: _____	Amount: \$_____

Authorized Signature:

Carrie Rank Date: _____

Carrie Rank (10/1/2021)
 Email: carrie.rank@sanjoseca.gov

8. Division Analyst Approval: Date: _____

Manpreet Sra (10/1/2021)
 Email: manpreet.sra@sanjoseca.gov

9. Consultant Approval: Date: _____
Danielle Harlan

Danielle D. Harlan
danielle@leadershipandhumanpotential.com (10/1/2021)
 Email: danielle@leadershipandhumanpotential.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: _____ Date: _____
 (Sr.) Deputy City Attorney

11. City Director Approval:

Jennifer Schembri

Date: _____

Jennifer Schembri
Jennifer Schembri (10/4/2021)
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: The Center for Advancing Leadership and Human Potential will support the City with consulting services for City employees by designing and facilitating Mentorship Recruitment sessions. This proposal is submitted under the **Master Agreement, Section 1.1.1 Training and Organizational Development Services**

Task No. 1 Design and Facilitate Recruitment and Training sessions

- A. Services:** The consultant will assist the City in developing themes, topics, outlines, and agendas for the mentoring program workshops
- B. Deliverable:** The consultant will:
- Develop agenda and content for 4 recruitment sessions, 2 for potential mentors and 2 for potential mentees.
 - Consultant to draft session plans, including: learning activities and outcomes, slides, facilitator notes, and evaluation plans
 - Facilitate two recruitment and training sessions for potential mentors and two for potential mentees. 90 minute sessions.
 - Develop an evaluation plan for all recruitment sessions.
- 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>Required to File Form 700?</u>		
		Yes Already Filed (Date Filed)	Yes Need to File	No
<u>Consultant's Contract Manager</u>				
Name: Danielle Harlan	Phone No.: (650) 843-9832			X
Address: 10221 River Rd., #61041Potomac, MD 20859	E-mail: Danielle@LeadershipAndHumanPotential.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 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	\$12,000	
	<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	\$0	
	<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	\$0	
	<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	\$0	
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 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		
Maximum Service Order Compensation (sum of Parts 1 through 3):				
\$12,000				