

**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. 4
- 3.** Consultant's Name: The Center for Advancing Leadership and Human Potential

- 4.** Project Name: Influencing Employee Retention Through Stay Interviews Initiative
- 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: | \$ | 273,500 |
| b. Maximum Service Order Compensation for this Approved Service Order: | \$ | \$55,000 |
| c. New unencumbered balance in Master Agreement (7.a – 7.b): | \$ | \$218,500 |
- 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 **001-48-400120-4052** will be encumbered to pay for this Approved Service Order.

Fund: <u>001</u>	Appn: <u>48</u>	RC: <u>400120</u>	Amount: \$55,000
Fund: _____	Appn: _____	RC: _____	Amount: \$ _____
Fund: _____	Appn: _____	RC: _____	Amount: \$ _____

Authorized Signature: Jennifer Schembri
Jennifer Schembri
Jennifer Schembri (12/21/2021)
Email: jennifer.schembri@sanjoseca.gov Date: _____

8. Division Analyst Approval: Janet Medlin
Janet C. Medlin
Janet Medlin (12/21/2021)
Email: janet.medlin@sanjoseca.gov Date: _____

9. Consultant Approval: Danielle Harlan
Danielle D. Harlan
danielle@leadershipandhumanpotential.com (12/21/2021)
Email: danielle@leadershipandhumanpotential.com 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: _____
 (Sr.) Deputy City Attorney

11. City Director Approval: Jennifer Schembri
Jennifer Schembri
Jennifer Schembri (12/21/2021)
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: The Center for Advancing Leadership and Human Potential will support the City with consulting services for City employees by offering an evidence-based Stay Interview learning and development program. This proposal is submitted under the **Master Agreement, Section 1.1.1 Training and Organizational Development Services**

Task No. 1 of 4: Project Planning & Pre-Work \$250 per hour not to exceed 40 hours (\$10,000)

A. Services: The consultant will support the City with an Employee Retention Through Stay Interviews Initiative Learning Program and provide an evaluation of the program to identify areas for improvement.

B. Deliverable: The consultant will:

- Conduct a Kickoff Meeting (Program Sponsors, Exec Sponsors, Key Personnel) to confirm objectives, deliverables, learning outcomes, and timeline.
- Prepare a draft project plan for the work.
- Identify best practices from the field for conducting Stay Interviews (including a list of supporting leadership competencies)
- 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: _____ 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 4: Program Design \$250 per hour not to exceed 60 hours (\$15,000 total)

A. Services: The consultant will support the City in designing an Employee Retention Through Stay
B. and provide an evaluation of the program to identify areas for improvement.

B. Deliverable: The consultant will:

- Conduct up to 3 focus groups and / or stakeholder interviews
- Design a customized Stay Interview protocol for the City
- Design and develop a DRAFT pilot Learning and Development program (slides with facilitator notes, list of materials) for conducting effective Stay Interviews
- Develop a DEI-aligned organizational communication plan (including communication/follow-up templates) for conducting Stay Interviews

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 4: Assessment Administration \$250 per hour not to exceed 24 hours (\$6,000)

A. Services: The consultant will support the City in conducting an organizational survey (OurCoach™) to identify contextual factors relevant to employee retention and the Employee Retention Through Stay Interviews Initiative Learning Program

B. Deliverable: The consultant will:

- Field an organizational survey to detect factors influencing employee retention at the City of San José.
- Collect data from the organizational survey and report survey results, including strategic recommendations, to the City.

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 4: Facilitate Stay Interview Learning and Development sessions and Program Evaluation Plan at \$250 per hour not to exceed 96 hours (\$24,000)

A. Services: The consultant will support the Influencing Employee Retention Through Stay Interviews Initiative Learning Program and provide an evaluation of the program to identify areas for improvement.

B. Deliverable: The consultant will:

- Deliver up to **8 Stay Interview sessions**. Length recommendation is up to 120 minutes each per session. Each session can accommodate up to 25 staff, (4 groups x 2 sessions each).
- Implement Program Evaluation Plan (collect/analyze post-session survey data, summarize results, and present findings to LD Team)

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 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., #61041 Potomac, MD 20869	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
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	\$10,000
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	\$15,000
3	<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	\$6,000
4	<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	\$24,000
Part 2 – Reimbursable Expenses			
<input 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):			
\$55,000			