## Master City of San José Consultant Agreement

(Non-Capital Projects)

## Amendment to Approved Service Order - Cover Page

- 1a. Intentionally Omitted.
   1b. Master Agreement AC No.: OC-000336
- 2. Second Third Amendment to Approved Service Order No. 1
- 3. Consultant's Name: Change & Innovation Agency
- 4. The above-referenced Approved Service Order is amended as follows:
  - 4a. Budget/Fiscal: The original Budget/Fiscal information in Section 7 of the Approved Service Order First Revised Budget/Fiscal Attachment Second Revised Budget/Fiscal Attachment is amended to read as set forth in the attached First Second Third Revised Budget/Fiscal Attachment.
  - **4b.** <u>Tasks - Attachment A</u>: The ☐ original ⊠ First Revised ☐ Second Revised Attachment A is amended to read as set forth in the attached ⊠ First ☐ Second ☐ Third Revised Attachment A.

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- 5. Each of the attachments to this amendment is incorporated herein by reference.
- 6. Consultant Approval:

			Email: brian@changeagentstraining.com		
7.	Approval as to Form (City Attorney):				
	$\square$	Form Approved by	the Office of the City Attorney		
		(The Maximum Service Or provisions of the form are	rder Compensation of the Approved Service Order, as amend not altered.)	ed, is \$100,000 or less, and the	
	Approved as to Form		m:	Date:	
		(Sr.) Deputy City Atto	orney:		
8.	City	Director Approval:	Jennifer Schembri	Date:	
			Email: jennifer.schembri@sanjoseca.gov		
		laster Consultant Agreemen Amendment to Approve 1349235/T-32026	t (Non-Capital Projects) d Service Order – Cover Page	Page: 1 of 1	

City Attorney Approval Date: September 2016

Date:

1.

2.

🛛 Fi	rst 🗌 Second 🔲	Third Revised	Budget/Fiscal Atta	chment			
This Revised Budget/Fiscal Attachment is attached to the Kirst Second Third amendment to Approved Service Order No. 1 issued pursuant to the Master Agreement.							
The Maximum Service Order Compensation set forth on Line 7.b. of Section 7 of the Approved Service Order cover page is:							
Decreased from \$ to \$							
🛛 Ir	☑ Increased from \$31,000 to \$61,000 and						
	<b>Appropriation Certification:</b> I certify that an unexpended appropriation in the amount of the increased 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: _4802	RC: 400110	Amount: \$30,000			
	Fund:	Appn:	RC:	Amount: \$			
	Fund:	Appn:	RC:	Amount: \$			
	Fund:	Appn:	RC:	Amount: \$			
	Authorized Signature: _			Date:			

3. If the Maximum Service Order Compensation is being increased, the unencumbered amount in the Master Agreement is sufficient as follows:

a.	Current unencumbered amount in Master Agreement:	\$ 280,000
b.	Increase in the Maximum Service Order Compensation:	\$ 30,000
C.	New unencumbered balance in Master Agreement	\$ 250,000

Master Agreement AC No.: OC-000336 Consultant: Change & Innovation Agency Service Order No.: 1

First Second Third Revised Attachment A: Tasl
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This Revised Attachment A is attached to the First Second Third amendment to Approved Service Order No. 1 issued pursuant to the Master Agreement.

The tasks set forth in the original Attachment A, or in any previous amendment to the original Attachment A, are amended as set forth herein. All other tasks shall remain unchanged.

## Task No. 1, entitled "Introduction to The Innovation Academy not to exceed \$46,000 at \$1,000 per session", is amended as follows:

- A. <u>Services</u>: The consultant will support the City with an **Innovation Academy** and provide an evaluation of the program to identify areas for improvement.
- B. <u>Deliverable</u>: The consultant will:
- 1. Deliver up to 46 sessions. Each session can accommodate up to 20 staff per session.
- 2. Provide techniques on how to see problems in their work space and techniques to solve those problems. The tools will focus on the innovation methodology, "See It, Say It, Solve It."
- 3. Teach two skills to "See" a problem and two skills to "Solve" a problem.
- 4. Require three one-hour video conferences per session and access to a self-paced Innovation and Problem-Solving course for three hours.
- **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 Consulting hours not to exceed \$15,000 at \$250 per hour

- A. <u>Services</u>: The consultant will support the City with a **Innovation Academy** and provide an evaluation of the program to identify areas for improvement.
- B. <u>Deliverable</u>: The consultant will:
- 1. Provide City of San Jose expertise in change management, innovation, and process improvement to help:
  - a) Facilitate its change initiatives and creation of ROI.
  - b) Identify ideas and best practices throughout the country.
  - c) Support employees and leadership with counsel and expertise in performance programs.
  - d) Help Client transition leadership and staff in an enhanced direction.
  - e) Provide advice and support for setting up Innovation or PMO programing.
- 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.]

Master Agreement AC No.: OC-000336					
Consultant: Change & Innovation Agency					
Service Order No.: 1					

First Second Third Revised Attachment C: Compensation Table

This Revised Attachment C is an attachment to the First Second Third amendment to Approved Service Order No. 1 issued pursuant to the Master Agreement.

Part 1 – Compensation for Services							
Column 1	Column 1 Column 2		Column 3			Column 4	
Task Nos.	Basis of Compensation		Invoice Period			Compensation	
1	Time & Materials	Fixed Fee	Monthly	Completion of Task(s)	Completion of Work	\$46,000	
2	☐ Time & Materials	Fixed Fee	Monthly	Completion of Task(s)	Completion of Work	\$15,000	
Part 2 – Reimbursable Expenses							
No expenses are separately reimbursable. The amount(s) in Column 4 of Part 1 include(s) payment for all expenses.				\$0			
Part 3 – Subconsultant Costs							
Subconsultant costs are <i>not</i> separately compensable. The amount(s) in Column 4 of Part 1 include(s) sub-consultant costs.			Subconsultant costs are separately compensable in the maximum amount of:		\$0		
Maximum Service Order Compensation (sum of Parts 1 through 3):					\$61,000		

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