

Exhibit A  
 Master City of San José Consultant Agreement  
 Approved Service Order Form  
 (Non-Capital Projects)  
 Cover Page

1a. Intentionally Omitted

1b. AC Contract No.: 32968

2. Approved Service Order No. 1

3. Consultant's Name: CivicMakers LLC

4. Project Name: Customer Service Team Retreat

5. Project Location: 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: \$ 400,000

b. **Maximum Service Order Compensation for this Approved Service Order:** \$ 2,500

c. New unencumbered balance in Master Agreement (7.a – 7.b): \$ 397,500

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

Fund: 001 Appn: 0432 RC: 000600 Amount: \$2,500

Fund: \_\_\_\_\_ Appn: \_\_\_\_\_ RC: \_\_\_\_\_ Amount: \$ \_\_\_\_\_

Fund: \_\_\_\_\_ Appn: \_\_\_\_\_ RC: \_\_\_\_\_ Amount: \$ \_\_\_\_\_



*Devika Tandan*  
 Email: devika.tandan@sanjoseca.gov  
 Date: 12/14/2022 08:17

Authorized Signature: \_\_\_\_\_

Date: \_\_\_\_\_

8. Division Analyst Approval:



*Jessica Lowry*  
 Email: jessica.lowry@sanjoseca.gov  
 Date: 12/14/2022 08:17

Date: \_\_\_\_\_

9. Consultant Approval:



*[Signature]*  
 Email: [Redacted]  
 Date: 12/14/2022 08:17

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:

\_\_\_\_\_  
 (Sr.) Deputy City Attorney

Date: \_\_\_\_\_

11. City Director Approval:



*Sarah Zarate*  
 Email: sarah.zarate@sanjoseca.gov  
 Date: 12/14/2022 08:17

Date: \_\_\_\_\_

**Form Name:** Master Consultant Agreement (Non-Capital Projects)  
Exhibit A: Approved Service Order Form  
**Form File:** 1348133/T-32026  
**City Attorney Approval Date:** September 2016

## 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.

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**General Description of Project for which Consultant will Provide Services:** The Information Technology Department's SJ 311 Customer Contact Center is seeking qualified consultant services to develop and host a 2 hour retreat focused on Customer Service Standards and improvement opportunities. Consultants may structure their approach according to these Tasks, or they may propose a different approach based on their knowledge and experience to accomplish the scope of work outlined.

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### Task No. 1: Planning

**A. Services:** Plan approach, agenda, and desired outcomes for conducting a 2-hour retreat for up to 25 participants on the SJ 311 Contact Center team

**B. Deliverable:** Retreat Agenda

**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: November 18, 2022

On or before two (2) business weeks prior to the retreat.

### Task No. 2: Facilitate a 2-hour Customer Service Team Retreat and Issue Summary Notes.

**A. Services:** Develop retreat materials & preparation, retreat facilitation and set up, and summary notes.

**B. Deliverable:** Completed Retreat and summary notes

**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: November 18, 2022

On or before two (2) business weeks prior to the retreat.

## Attachment B: Terms and Conditions

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

Name: Kia O'Hara	Phone No.: 408-795-3133
Department: Information Technology	E-mail: kia.ohara@sanjoseca.gov
Address: 200 E. Santa Clara St. San José, 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
<b><u>Consultant's Contract Manager</u></b>				
Name: Judi Brown	Phone No.: 415-933-9575			<u>X</u>
Address: 530 Divisadero St. PMB 889 San Francisco, CA 94117	E-mail: judi@civicmakers.com			
<b><u>Other Staffing</u></b>				
<u>Name:</u>	<u>Assignment:</u>			
				<u>X</u>

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
<b>Task Nos. from Attachment A</b>	<b>Basis of Compensation</b>	<b>Invoice Period</b>	<b>Compensation</b>
Task 1	<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	\$500
Task 2	<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	\$2,000
Task 3	<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	\$
Task 4	<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	\$
Task 5	<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 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:	
<input type="checkbox"/> Subconsultant costs are <b>not</b> 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:	
Part 3 – Subconsultant Costs			
<b>Maximum Service Order Compensation</b> (sum of Parts 1 through 2):			\$2,500