

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-001716-000

2. First Second Third Amendment to Approved Service Order No. 1

3. Consultant's Name: Guidehouse Inc. ("Consultant")

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. **Tasks - Attachment A:** The original First Revised Second Revised Attachment A is amended to read as set forth in the attached First Second Third Revised Attachment A.

4c. **Compensation Table - Attachment C:** The original First Revised Second Revised Attachment C is amended to read as set forth in the attached First Second Third Revised Attachment C.

5. Each of the attachments to this amendment is incorporated herein by reference.

6. **Consultant Approval:** **Coli**  Date: _____

Email: cclopes@guidehouse.com
Date: 08/01/2022 GMT

7. Approval as to Form (City Attorney):

Form Approved by the Office of the City Attorney

(The Maximum Service Order Compensation of the Approved Service Order, as amended, is \$100,000 or less, and the provisions of the form are not altered.)

Approved as to Form:
(Sr.) Deputy City Attorney: Attorney Diana Yuan Date: _____



Email: diana.yuan@sanjoseca.gov
Date: 08/01/2022 GMT

8. **City Director Approval:** **Sara**  Date: _____

Email: sarah.zarate@sanjoseca.gov
Date: 08/01/2022 GMT

First **Second** **Third** **Revised Attachment A: Tasks**

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 "Discovery," is amended as follows:

- A. Services:** Use targeted interviews and data analysis to develop a better understanding of the customer experience across various City departments and offices, person-to-person customer service needs, and areas of focus for transforming the way that the City provides customer service to residents and businesses within the delivery of City services.

As part of this scope, the Consultant team will be asked to conduct interviews, and possibly intercepts, with stakeholders including, but not limited to Council members, constituents, department staff, and others as necessary.

As part of this scope, the Consultant team will be asked to collect and analyze data related to the delivery of City services including, but not limited to department service delivery data and reports from the Office of the City Auditor, the City Manager's Budget Office, and City Council Memos and Presentations.

Interviews (and service specific research) must include the following:

- Councilmembers and their office staff
- Councilmember recommended constituents
- Core Service Delivery Departments including but not limited to:
 - Planning, Building, and Code Enforcement
 - Department of Transportation
 - Community Energy
 - Environmental Services
 - Finance Department
 - Parks, Recreation, and Neighborhood Services
 - Retirement Services
- City Manager and Assistant City Manager
- City Manager Leadership Team

Note: It is expected that approximately 90 unique interviews will be conducted across the Discovery and Current State Tasks inclusive of City staff, City leadership, and members of the public. Some initial interviews must be completed by June 30, 2022 but that number is flexible and may be small in quantity.

- B. Deliverable:** Discovery Findings Report, Interview Materials

- 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: August 31, 2022 but some interviews must be complete by June 30, 2022.

On or before ____ Business Days from _____.

Task No. 2, entitled “Mapping the Current State,” is amended as follows:

- A. Services:** Prioritize and segment customers and identify personas representing key attributes, behaviors, and scenarios that differentiate their journey using City services. Use primary and secondary research to create journey maps that capture persona love points, pain points, and insights at key moments within City service delivery. This includes “active” delivery of services and the “passive” general inquiries including emails, phone calls, etc.

Segments and personas should include but not be limited to non-English speaking customers and differently abled customers use cases for key stakeholder identified in the discovery Task.

- B. Deliverable:** Mapping Report, Customer Segments, Personas, Customer Service Journey Maps

Note: City staff may be interviewed and may provide existing documentation but will not be able to provide assistance in co-creating these deliverables. Deliverable scale and complexity for similar projects was approximately 90 pages of documentation.

- 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: September 16, 2022.

On or before ____ Business Days from _____.