

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

Cover Page

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- 1a.** Intentionally Omitted **1b.** AC Contract No.: OC-001802
- 2.** Approved Service Order No. 1
- 3.** Consultant's Name: CivicMakers ("Consultant")
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- 4.** Project Name: Human-Centered Design Learning Lab ("Project")
- 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), which are incorporated herein by references.
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- 7. Budget/Fiscal:**
- | | | |
|---|----|---------|
| a. Current unencumbered amount in Master Agreement: | \$ | 320,000 |
| b. Maximum Service Order Compensation for this Approved Service Order: | \$ | 60,000 |
| c. New unencumbered balance in Master Agreement (7.a – 7.b): | \$ | 260,000 |
- 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 **001-48-400100-4052** encumbered to pay for this Approved Service Order.
- | | | | |
|---------------------------|---------------------------|---------------------------|--------------------------------|
| Fund: <u> 001 </u> | Appn: <u> 0482 </u> | RC: <u> 400100 </u> | Amount: \$60,000 |
| Fund: <u> </u> | Appn: <u> </u> | RC: <u> </u> | Amount: \$ <u> </u> |
| Fund: <u> </u> | Appn: <u> </u> | RC: <u> </u> | Amount: \$ <u> </u> |

Authorized Signature: _____ Date: _____




Email: carrie.rank@sanjoseca.gov
Date: 08/23/2022 GMT

8. Division Analyst Approval: _____ Date: _____



Email: randi.perry@sanjoseca.gov
Date: 08/23/2022 GMT

9. Consultant Approval: _____ Date: _____



Email: judi@civicmakers.com
Date: 08/23/2022 GMT

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: _____ Date: _____

Jennifer Schembri
Email: jennifer.schembri@sanjoseca.gov
Date: 08/23/2022 GMT

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: CivicMakers will provide the City with consulting services by facilitating two Learning Lab programs. The consultant will support the City by introducing employees to tools and techniques to design, test, and implement solutions to solve relevant challenges with the City of San Jose. This is submitted under the Master Agreement Section 1.1.1 Training and Organizational Development Services.

Task No. 1: Facilitate Intro Session: Team Building & Tool Orientation and Session 1: Intro to Human-Centered Design in Government

- A. Services:** The Consultant will facilitate an intro session and the first session of the Learning Lab
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Intro Session and Learning Lab session #1. Session length recommendation for Intro Session is 1.4 hours and for Learning Lab session 1 is one 3-hour session for up to 25 participants
 - Introduce employees to Learning Lab by establishing roles & responsibilities, team charters, and virtual co-creation tools
 - Overview of Human Centered Design, review of project timeline & expectations, and conduct a mini-challenge practice activity
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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: Facilitate Session 2: Challenge Discovery

- A. Services:** The Consultant will facilitate a session of the Learning Lab
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab session #2. Session length recommendation for is one 3-hour session for up to 25 participants
 - Guided process of challenge discovery & definition, stakeholder identification, guidelines for stakeholder interviews and research
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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: Facilitate Session 3: Stakeholder Interviewing & Data Analysis and conduct coaching sessions

- A. Services:** The Consultant will facilitate a session of the Learning Lab and conduct two coaching sessions with each team
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab session #3. Session length recommendation for is one 3-hour session for up to 25 participants
 - Support teams through qualitative data analysis, summarizing research findings, incorporating feedback, and ideating possible solutions
 - Support teams with interview logistics and best practice
 - Guide teams through data analysis with interview data
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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: Facilitate Session 4: Journey Mapping & Challenge Reframing and conduct a coaching session

- A. Services:** The Consultant will facilitate a session of the Learning Lab and conduct a coaching session with each team
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab session #4. Session length recommendation for is one 3-hour session for up to 25 participants
 - Assist teams in creating tangible representations of ideas for solutions/validations of user research
 - Guide teams with journey mapping and identify insights/challenges
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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. 5: Facilitate Session 5: Ideation & Prototyping and conduct coaching sessions

- A. Services:** The Consultant will facilitate a session of the Learning Lab and conduct two coaching sessions with each team
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab session #5. Session length recommendation for is one 3-hour session for up to 25 participants
 - Guide teams in incorporating feedback; building, testing, and revising prototypes. Establishing success metrics, documenting lessons learned and next steps in moving solutions forward
 - Provide feedback on team prototypes
 - Coach teams through storytelling and building their presentations for Demo Day
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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. 6: Facilitate Demo Day and Celebration/AAR

- A. Services:** The consultant will support the City with an evaluation of the program to identify areas for improvement.
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab Demo Day and conduct After Action Review. Session length recommendation for Demo Day and is 1.5 hour session and for After Action Review is 1 hour
 - Facilitate Demo Day presentations
 - Conduct an After-Action Review and Celebration with participants
 - Meet with HR to conduct an internal After-Action Review
 - Provide HR with evaluation of program from collection of after actions data, impact evaluation, identification of key take-aways and lessons learned
- 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, 2023 _____.
- 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. 7: Facilitate Intro Session: Team Building & Tool Orientation and Session 1: Intro to Human-Centered Design in Government

- A. Services:** The Consultant will facilitate an intro session and the first session of the Learning Lab
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Intro Session and Learning Lab session #1. Session length recommendation for Intro Session is 1.4 hours and for Learning Lab session 1 is one 3-hour session for up to 25 participants
 - Introduce employees to Learning Lab by establishing roles & responsibilities, team charters, and virtual co-creation tools
 - Overview of Human Centered Design, review of project timeline & expectations, and conduct a mini-challenge practice activity
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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. 8: Facilitate Session 2: Challenge Discovery

- A. Services:** The Consultant will facilitate a session of the Learning Lab
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab session #2. Session length recommendation for is one 3-hour session for up to 25 participants
 - Guided process of challenge discovery & definition, stakeholder identification, guidelines for stakeholder interviews and research
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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. 9: Facilitate Session 3: Stakeholder Interviewing & Data Analysis and conduct coaching sessions

- A. Services:** The Consultant will facilitate a session of the Learning Lab and conduct two coaching sessions with each team
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab session #3. Session length recommendation for is one 3-hour session for up to 25 participants
 - Support teams through qualitative data analysis, summarizing research findings, incorporating feedback, and ideating possible solutions
 - Support teams with interview logistics and best practice
 - Guide teams through data analysis with interview data
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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. 10: Facilitate Session 4: Journey Mapping & Challenge Reframing and conduct a coaching session

- A. Services:** The Consultant will facilitate a session of the Learning Lab and conduct a coaching session with each team
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab session #4. Session length recommendation for is one 3-hour session for up to 25 participants
 - Assist teams in creating tangible representations of ideas for solutions/validations of user research
 - Guide teams with journey mapping and identify insights/challenges
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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. 11: Facilitate Session 5: Ideation & Prototyping and conduct coaching sessions

- A. Services:** The Consultant will facilitate a session of the Learning Lab and conduct two coaching sessions with each team
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab session #5. Session length recommendation for is one 3-hour session for up to 25 participants
 - Guide teams in incorporating feedback; building, testing, and revising prototypes. Establishing success metrics, documenting lessons learned and next steps in moving solutions forward
 - Provide feedback on team prototypes
 - Coach teams through storytelling and building their presentations for Demo Day
 - Provide Remote Coaching. Work individually with each team to apply tools and techniques introduced during the labs.
- 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, 2023 _____.
- 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. 12: Facilitate Demo Day and Celebration/AAR

- A. Services:** The consultant will support the City with an evaluation of the program to identify areas for improvement.
- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:
- Deliver Learning Lab Demo Day and conduct After Action Review. Session length recommendation for Demo Day and is 1.5 hour session and for After Action Review is 1 hour
 - Facilitate Demo Day presentations
 - Conduct an After-Action Review and Celebration with participants
 - Meet with HR to conduct an internal After-Action Review
 - Provide HR with evaluation of program from collection of after actions data, impact evaluation, identification of key take-aways and lessons learned
- 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, 2023 _____.
- 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: Randi Perry	Phone No.: (408) 975-1434
Department: Human Resources	Email: randi.perry@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: Judi Brown	Phone No.: (415) 933-9575			<u>X</u>
Address: 530 Divisadero St, PMB 889 San Francisco, CA 94117	Email: judi@civickmakers.com			
<u>Other Staffing</u>				
<u>Name:</u>	<u>Assignment:</u>	<u>Email:</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 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 type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
2	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
3	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
4	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
5	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
6	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
7	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
8	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
9	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
10	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
11	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000
12	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,000

Part 2 – Reimbursable Expenses

No expenses are separately reimbursable. The amount(s) in Column 4 of Part 1 include(s) payment for all expenses.

Expenses are separately reimbursable in the maximum amount of:

\$ 0

Part 3 – Subconsultant Costs

Subconsultant costs are **not** separately compensable. The amount(s) in Column 4 of Part 1 include(s) subconsultant costs.

Subconsultant costs are separately compensable in the maximum amount of:

\$ 0

Maximum Service Order Compensation (sum of Parts 1 through 3):

\$ 60,000