

## Cover Page

4. Project Name: Professional Development Training for Airport Department (“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.

- Email: mnodal@sjc.org  
Date: 07/12/2023 GMT

- Email: [chad.gallacinao@sanjoseca.gov](mailto:chad.gallacinao@sanjoseca.gov)  
Date: 07/12/2023 GMT

- Email: [critchie@learnit.com](mailto:critchie@learnit.com)  
Date: 07/12/2023 GMT

☒ 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

**11. City Director Approval:**

**Jennifer Schembri**  
*Jennifer Schembri*

Email: jennifer.schembri@sanjoseca.gov  
Date: 07/12/2023 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.

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**General Description of Project for which Consultant will Provide Services:** Learn IT, Inc will provide the City with training services by facilitating a virtual Storytelling for Business workshop. The Consultant will provide City employees with foundational knowledge to bring ideas to life and motivate people to action. This is submitted under the Master Agreement Section 1.1 Training and Organizational Development Services.

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**Task No. 1:** Facilitation of Training not to exceed \$1,850 at \$925 per hour

**A. Services:** The Consultant will design and facilitate a course on Story Telling for Business

**B. Deliverable:** The Consultant will provide the following to the City's Contract Manager:

- Meet with Airport staff to discuss content of the course
- Deliver one course on Story Telling for Business
  - Employees will:
    - ☐ Learn the four key story elements
    - ☐ Practice applying each one in a series of scaffolded, small group breakouts
    - ☐ Broaden their application of story elements to include situation-problem-solution frameworks, metaphors and analogies
    - ☐ Leave with a fully developed story, analogy or SPS framework that they build for themselves and can apply immediately
  - Course will be provided in a two-hour Zoom session
  - 25 students preferred
- Provide registration management, evaluation, and supplemental materials

**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: September 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 <sup>th</sup> Floor Tower, 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>		
<u>Consultant's Contract Manager</u>			Yes  Already Filed (Date Filed)	Yes  Need to File	No
Name: Courtney Ritchie	Phone No.:  415-693-0250				<u>X</u>
Address: 632 Commercial St, San Francisco, CA 94111	Email: critchie@learnit.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 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	\$1,850
Part 2 – Reimbursable Expenses			
<input checked="" 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 <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:	\$0
Maximum Service Order Compensation (sum of Parts 1 through 3):			\$1,850