Consultant: Metropolitan Planning Group

February 2023

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.: 33258				
2.	Approved Service Order No. 1							
3.	Consultant's Name: Metropolitan Plann	ning Group ("Consultant")						
4.	Project Name: Various Planning Project	cts ("Project")						
5.	Project Location: Citywide							
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:			\$	2,000,000.00		
	b. Maximum Service Order Compens	sation for this Approved S	Service O	rder:	\$	262,080.00		
	c. New unencumbered balance in Mas		\$	1,737,920.00				
	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 App	n:204S	RC: _5	38752 Amount:	: \$137,28	30		
	Fund:001	n. 22211	DC. E.	79631 Amount:	\$124,80	00		
	Authorized Signature: Email: kenne Date: 01/26/	Ken de Kar th.dekay@sanjoseca.gov 2023 GMT	y		Date:			
8.	Division Analyst Approval:	Email: kayla.do@sanjoseca.gov ,Date: 01/26/2023 GMT	a Do		Date:			
9.	Consultant Approval:	Email: hbradley@m-group.us Date: 01/26/2023 GMT	Bra	dley	Date:			
10.	Approval as to Form (City Attorney):							
	☐ Service Order Form Approved by t	he Office of the City Attorne	ev.					
	(Maximum Service Order Compen	si Johnne	n PL	ervice order for	rm are not a	Itered.)		
		Email: johnny.phan@sanjoseca.go Date: 02/01/2023 GMT Chief Deputy City Attorney)V		Date:			

Form Name: Master Consultant Agreement (Non-Capital Projects) Exhibit A: Approved Service Order Form File: 1348133_3/T-32026

City Attorney Approval Date: September 2022

Page: 1 of 5

Service Order No. 1 Consultant: Metropolitan Planning Group February 2023

11.	City	Director	Approval:
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Chu	Chang

Date: _____

Email: chu.chang@sanjoseca.gov Date: 02/01/2023 GMT Consultant: Metropolitan Planning Group

February 2023

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: Consultant will provide temporary staffing services for Planning services. Task No. 1: LEAP Grant Planner duties for the Five Wounds and Capital Caltrain Station Area Plan Projects. A. Services: Planner will be working in LEAP funded projects including Five Wounds Urban Village Update, Task 1 Project Management, Task 2 Community Outreach, Task 3 Plan Chapters, and Task 4 Draft and final plan. Planner may also work in LEAP funded Capitol Caltrain Station Area Plan, Task 1 Project Set up, Task 2 Issue identification & Vision; Task 3 Conceptual Plan Development; Task 4 Draft Plan Documents; Task 5 Final Plan Document. B. Deliverable: The Consultant will provide the following to the City's Contract Manager: Planner assignments as noted in Task 1 section A. 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: _____6/30/23 ______. \boxtimes On or before ____ Business Days from _____ Task No. 2: Destination Home Planner duties A. Services: Advanced Planner duties including: a. Review, process and expedite affordable housing planning applications, including Preliminary Review Applications with some component of Affordable Housing; b. Draft quarterly updates and reports for grantor on application activity: c. Respond to inquiries from affordable housing developers General land use and review process questions, Interpretation of GP policies H-2.9 and IP-5.12, Streamline review process (SB 35 and AB 2162) d. Attend coordination meetings such as Housing Catalyst Team meetings, Housing Department coordination meetings e. Track and review pending State legislation on Affordable Housing. B. Deliverable: The Consultant will provide the following to the City's Contract Manager: Planner assignments as noted in Task 2 section A. 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: ______. \boxtimes On or before _____ Business Days from _____

Form Name: Master Consultant Agreement (Non-Capital Projects)
Exhibit A: Approved Service Order Form

Form File: 1348133_3/T-32026

City Attorney Approval Date: September 2022

Attachment B: Terms and Conditions

1. <u>City's Contract Manager</u>: The City's contract manager for this Approved Service Order is:

Name: Charla Gomez & Ruth Cueto	Phone No.: 408-535-3555
Department: PBCE Planning Division	Email: Task 1: charla.gomez@sanjoseca.gov
	Task 2: Ruth.cueto@sanjoseca.gov
Address: 200 E Santa Clara St., 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."

		Required to File Form 700?			
Consultant's Contract		Yes Already Filed (Date Filed)	Yes Need to File	No	
Name: Heather Bradley	Phone No.: 408- 340-5642 ex 103				X
Address: 51 E. Campbell Ave ste 1247, Campbell, CA 95009 Email: hbradley@group.us					
Other Staffing					
<u>Name</u> :	Assignment:	Email:			
1. Eric Roberts	Task 1 – Advanced Planner – 40 hrs/wk	eroberts@m-group.us		Х	
2. Kavitha Kumar	Task 2 – Principal Planner – 40 hrs/wk	kkumar@m-group.us	X (7/25/2022)		

Page: 3 of 5

Form Name: Master Consultant Agreement (Non-Capital Projects)

Exhibit A: Approved Service Order Form

Form File: 1348133_3/T-32026

City Attorney Approval Date: September 2022

Consultant: Metropolitan Planning Group February 2023

3.	<u>Subconsultants</u> : Whichever of the following is marked applies to this Approved Service Order:						
	\boxtimes	The Consultant can <i>not</i> use a	any subconsultants.				
		The Consultant can use the following subconsultants to assist in providing the equired services and deliverables:					
		Subconsultant	<u>t's Name</u>	Are	ea of Work		
		1.					
4.	Approve then on Reimbu	Irsable Expenses: If the Cored Service Order states that the ly the expenses identified in Sersable Expenses unless the fees are set forth: In addition to the expenses identified in Services are set forth:	ne City will reimburse to ubsection 10.5.3 of the ollowing box is marked entified in Subsection	he Consulta e Master Ag I and addition 10.5.3 of th	ant for expenses, greement are onal reimbursable e Master		
		Additional Reim	bursable Expense(s)	1	<u>Mark-up</u>		
		1					
		2					
		3					
	the abo	nstanding the foregoing, any ove table will be disregarded reimburse the Consultant fo	if the Compensation	able expen n Table stat	se(s) set forth in tes that the City		
5.	Consult check o assigne	ound Check Confirmation: And has conducted or caused of the Temporary Personnel sed employee(s) listed in this Append Clearance Requirements	to be conducted a crin lected for this Approve proved Service Order	ninal history ed Service (background Order and that the		
	of Backg	round Check:					
By Employer	### ##################################	n-group.us GMT					
	e: Heathe Treasure	er Bradley er	Date				

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Exhibit A: Approved Service Order Form
Form File: 1348133_3/T-32026
City Attorney Approval Date: September 2022

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	1 Column 2			Column 4				
Task Nos. from Attachment A	Basis of Comp	ensation		Invoice Period				
Task 1		☐ Fixed Fee		☐ Completion of Task(s)	☐ Completion of Work	\$124,800.00		
Task 2		☐ Fixed Fee		☐ Completion of Task(s)	☐ Completion of Work	\$ 137,280.00		
	☐ Time & Materials	☐ Fixed Fee	☐ Monthly	Completion of Task(s)	☐ Completion of Work	\$		
	☐ Time & Materials	☐ Fixed Fee	☐ Monthly	Completion of Task(s)	☐ Completion of Work	\$		
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 <i>not</i> 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		
			Ma	ximum Service Order Compen	sation (sum of Parts 1 through 3):	\$262,080.00		

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Exhibit E – Notice of Exercise of Option to Extend Agreement

Form/File No.: T-32026_3/

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