

**SECOND AMENDMENT
TO PROFESSIONAL SERVICES AGREEMENT NUMBER F002745
WITH JACOB GREEN & ASSOCIATES, INC**

This Second Amendment to Agreement number F002745, dated January 8, 2024 ("Agreement") is made as of this ____ day of _____, 2024, by and between the City of Santa Rosa, a municipal corporation ("City"), and Jacob Green & Associates, Inc, a California Stock Corporation – CA - General ("Consultant").

RECITALS

- A. City and Consultant entered into the Agreement for Consultant to provide professional assistance with Council goal setting, as previously amended by the first amendment to include insurance requirements as Attachment One and replacing the Scope of Services with Exhibit A-1.
- B. City and Consultant now desire to amend the Agreement for the purpose of adding additional services and compensation to assist in quarterly work plan implementation support and three process improvements.

AMENDMENT

NOW, THEREFORE, the parties agree to amend the Agreement as follows:

1. Section 1. Scope of Services

Exhibit A-1 to the Agreement is supplemented by the additional scope of work set forth in Exhibit A-2 to this Amendment.

2. Section 2. Compensation

Section 2(c) is amended to increase the compensation payable to Consultant under the Agreement by \$61,800 to read as follows:

"Notwithstanding any other provision in this Agreement to the contrary, the total maximum compensation to be paid for the satisfactory accomplishment and completion of all tasks set forth above shall in no event exceed the sum of one hundred forty-one thousand, eight-hundred dollars and no cents (\$141,800.00). The City's Chief Financial Officer is authorized to pay all proper claims from Charge Number 010000-5320"

3. Section 12. Time of Performance

The last sentence of Section 12 is amended to read as follows:

"Consultant shall complete all the required services and tasks and complete and tender all deliverables to the reasonable satisfaction of City, not later than in the schedule set forth in Exhibit A-2."

All other terms of the Agreement shall remain in full force and effect.

Executed as of the day and year first above stated.

CONSULTANT:

Name of Firm: JACOB GREEN &
ASSOCIATES, INC

TYPE OF BUSINESS ENTITY (*check one*):

☐ Individual/Sole Proprietor
☐ Partnership
☒ Corporation
☐ Limited Liability Company
☐ Other (please specify: _____)

Signatures of Authorized Persons:

By: _____

Print Name: Jacob Green

Title: President & CEO/Secretary

By: _____

Print Name: Jacob Green

Title: President & CEO/Secretary

CITY OF SANTA ROSA

a Municipal Corporation

By: _____

Print Name: Natalie Rogers

Title: Mayor

APPROVED AS TO FORM:

Office of the City Attorney

ATTEST:

City Clerk

Attachment: Exhibit A-2 – Supplement to Exhibit A-1 Scope of Services

PROPOSAL FOR ORGANIZATIONAL DEVELOPMENT SERVICES

PROPOSAL FOR



MAY
2024



13217 Jamboree Rd., #248

Tustin, CA 92782

888.4.JGA.1ST

JacobGreenAndAssociates.com



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SANTA ROSA

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COST PROPOSAL

May 24, 2024

Maraskeshia Smith, City Manager
City of Santa Rosa
100 Santa Rosa Avenue
Santa Rosa, CA 95404

Dear City Manager Smith,

Thank you for considering Jacob Green & Associates (JGA) for the Work Plan Implementation Support and Process Improvement Services for the City of Santa Rosa. We are excited about the opportunity to assist the City in building upon its existing Work Planning effort and enhancing the efficiency and effectiveness of its key processes.

Our proposal includes two key services designed to meet your needs:

- **Process Improvement Facilitation:** We will enhance the efficiency and effectiveness of key processes within the City using the DMAIC methodology. This involves identifying high-impact processes, analyzing, and improving them through workshops, and documenting the improvements for sustainable results.
- **Work Plan Implementation Support:** We will guide the City in the next steps of the Work Plan Implementation, ensuring continued visibility and fostering a culture of continuous improvement. This includes facilitating quarterly updates and making necessary modifications based on feedback.

We are committed to maintaining a strong partnership with the City of Santa Rosa and supporting your commitment to service and workforce excellence.

Thank you for your trust in JGA. We look forward to contributing to the continued success of the City of Santa Rosa.

Sincerely,

A handwritten signature in blue ink, appearing to read "Jacob Green".

Jacob Green
President & CEO

SCOPE OF SERVICES

SECTION A



SERVICE 1: PROCESS IMPROVEMENT FACILITATION

Jacob Green & Associates (JGA) will partner with the City Santa Rosa to enhance the efficiency and effectiveness of key processes within the City. Our approach follows the DMAIC (Define, Measure, Analyze, Improve, Control) methodology, ensuring a structured and thorough improvement process. We will focus on up to three critical processes identified by the City of Santa Rosa.

STEP 0: PROCESS PRIORITIZATION AND SELECTION

In collaboration with the City of Santa Rosa, we will work with City subject matter experts to identify processes that are appropriately sized for improvement and promise a high return on investment (ROI). By leveraging our expertise and working closely with city stakeholders, we will ensure that the selected processes are not only manageable within the scope of this initiative but also have the potential to deliver significant and measurable benefits to the city's operations. This targeted approach will maximize the effectiveness and sustainability of the process improvements.

STEP 1: ANALYSIS, INTERVIEW, AND DATA COLLECTION (DEFINE AND MEASURE)

In the first stage, JGA will focus on defining and measuring the current state of the selected process. Our goals are to understand the existing process, identify key stakeholders, and collect relevant data. We will engage with stakeholders through interviews to gain insights and perspectives on the process flow and existing pain points. Concurrently, we will gather quantitative data and review performance metrics to establish baseline measurements. This stage will culminate in the development of a scoping document, including a high-level current state map and baseline data points.

STEP 2: ON-SITE WORKSHOP (ANALYZE AND IMPROVE)

The second stage involves a one-day (4-8 hours) on-site workshop designed to analyze and improve the selected process. JGA will facilitate the workshop with up to 10 participants, including key stakeholders and process owners, following a kaizen flow. During the workshop, we will review the current state process maps and facilitate discussions to identify pain points and challenges. Utilizing root cause analysis techniques, we will pinpoint the underlying issues. The collaborative effort will then focus on developing future/ideal state process maps that address the identified problems and optimize performance. The workshop will conclude with the creation of an actionable plan, detailing specific actions or projects, designated owners, expected outcomes, and high-level timelines.

STEP 3: DEVELOPMENT AND DOCUMENTATION (CONTROL)

In the final stage, JGA will transition to the control phase to develop and document the improvements. JGA will develop a final report that includes updated current and future state process maps based on findings from the workshop and a summary action plan that outlines specific actions, owners, outcomes, and timelines.

SERVICE 2: WORK PLAN IMPLEMENTATION

JGA will guide the City in the next step in the Work Plan Implementation process by ensuring continued visibility. This process of monitoring and follow-up not only keeps the project on track but also fosters a culture of continuous improvement, leading to more reliable and sustainable outcomes. JGA will provide the following:

- Facilitate quarterly 2024 - 2025 Work Plan document and dashboard updates from Staff using the process established during the Implementation Phase.
- Make as-needed modifications to the Work Plan document and dashboard layout based on input from Staff and Council.





YOUR TEAM

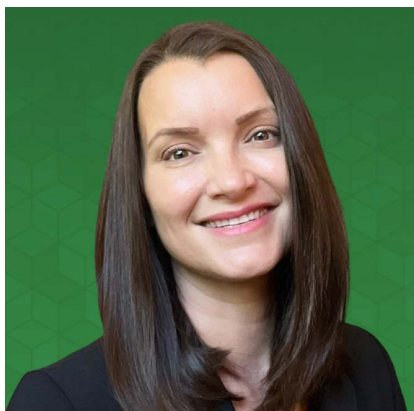
SECTION B



JACOB GREEN, MPA

President & CEO

Jacob is a nationally recognized local government expert in organization and leadership development. As an Assistant City Manager for the City of San Juan Capistrano and the City of Ontario, he has managed hundreds of employees and managed numerous government departments. As a trainer, keynote speaker, facilitator and coach, Jacob has worked with municipal clients, as well as commercial clients such as Mattel, FedEx, Hyundai Capital, ADP and many others. In 2019, Jacob distilled his personal and professional experiences into an Amazon Best-Selling book: "See Change Clearly: Leveraging Adversity to Sharpen Your Vision and Build Resilient Teams." Jacob has received numerous awards for his leadership, including the National Caring Award, the Orange County Human Relations Award, Most Inspiring Student at UC Irvine, and is the youngest recipient of the Gene Lentzner Humanitarian Award. Jacob has his Bachelor of Arts in Social Sciences with a Minor in Management from the University of California, Irvine, his Master of Public Administration (MPA) degree from California State University, Long Beach, and was recently awarded an honorary doctorate degree from Western University School of Health Sciences.



NICOLE BEACH

Director of Strategic Initiatives

Nicole Beach is a project management and strategy delivery leader who specializes in assisting organizations in realizing value by aligning strategy with execution. Nicole collaborates closely with our clients to develop work plans that ensure their success in executing strategic goals and provides project management oversight across all projects. Before joining JGA, Nicole amassed a wealth of experience leading complex technology, organizational, and strategic projects, including M&A integrations, ERP implementations, and process improvement initiatives. Most recently, she oversaw Project Management Offices and Strategic Portfolio Management for SAFEbuilt, Citrix, and Sport Clips. Nicole holds certifications as a Project Management Professional (PMP) and Lean Six Sigma Green Belt. She also earned an MBA with a concentration in Process Improvement from Nova Southeastern University.



KATHRYN HAMEL

Senior Facilitator

Kathryn Hamel, Ph.D, is a seasoned executive with over 28 years of experience in the public, non-profit, and private sectors. She previously worked as a Vice President and Chief Executive Officer for two non-profit mental health organizations. Before transitioning into nonprofit leadership, she served as the Senior Vice-President of Human Resources and Organizational Development for a private, accredited international university. She also served her community for nearly 25 years as a law-enforcement professional for two mid-sized municipal police departments and retired as a police lieutenant in 2019. In addition to her professional accomplishments, Dr. Hamel is chairperson of the International Association of Chiefs of Police Engagement and Education Subcommittee, a subcommittee of the Human and Civil Rights Committee. She was recognized as the Advocate of the Year from the Greater Irvine Chamber of Commerce in 2023, and the Mental Health Professional of the Year from the Mental Health Association of Orange County in 2022. She is pursuing a Master's Degree in Clinical Psychology, projected to be completed in late 2024. In addition, she holds a Doctoral Degree in Organizational Public Safety Leadership & Criminal Justice from Capella University, a Master's Degree in Criminal Justice from Chapman University, and a Bachelor's Degree in Vocational Education and Occupational Studies from California State University, Long Beach. Dr. Hamel also holds two professional certifications in trauma and resilience and a third professional certification in the prevention of human trafficking from Florida State University. She is the author of *Body, Mind, and Badge: Strategies for Navigating Law Enforcement Trauma and Resilience* and co-author of 'A Trauma-Informed Approach to Labor & Sex Trafficking,' published in *Police Chief* magazine in 2023.



TERI LEDOUX

Senior Facilitator

Teri Ledoux served in local government for over 25 years. Starting as an unpaid Intern in the City Manager's Office, Teri quickly realized a passion for serving the community through problem solving, analysis, and most important through teamwork. Holding positions as Analyst, Assistant to the City Manager, Director of Administrative Services, Assistant City Manager and City Manager in 3 cities (within 3 different counties) over her career provided Teri the opportunity to constantly learn and grow. While Teri's City Manager position came relatively late in her career, she was able to take years of watching and learning from others to work side by side with her team to accomplish what seemed to be impossible. Teri worked in cities with large and small populations, cities with healthy and not so healthy budgets, and cities with very different issues. This journey led to Teri to return home to the City of San Bernardino late in her career where she was able to lead the City through the final steps of bankruptcy. Her major accomplishment during this time was successfully leading the community engagement effort to replace the expiring .25 (\$9M) sales tax measure with a 1% (\$40M) sales tax measure. The importance of giving back to our upcoming leaders is a priority for Teri. Teri holds a Bachelor's Degree in Business Administration and a Master's Degree in Public Administration.



MEGHAN MURRAY

Project Specialist

Meghan Murray has over 20 years of experience in the Federal Government. She retired from the United States Air Force and has a background in Data Analytics, Operations Management, Program Management, Executive Administration, and Continuous Process Improvement. Meghan has directed multiple programs valued at \$1 billion while managing risk, safety, and compliance. Additionally, Meghan holds a Master of Science degree with a specialty in Human Resource Management, bringing to the team extensive knowledge in team leadership, strategic planning, and data-driven decision-making. One of Meghan's most notable projects was being a strategic team lead of the Organization of the Future, which led to the establishment of the latest branch of the military, the United States Space Force. Leveraging her extensive knowledge in team management, the team successfully transitioned over 300 subject matter experts to become the face of the Space Force.



NICOLI HILSCHER

Senior Project Manager

Nicoli Hilscher has over 21 years of experience in Federal and Local Government. She retired from the United States Air Force in the top two percent of the active enlisted force, as a Senior Master Sergeant. Nicoli has an extensive background in Leadership Development, Training Facilitation, Project Management, and Instructional Development. She has held positions internationally in various levels of leadership providing long-term organizational growth in diverse, fast-paced environments. Nicoli is a cross-functional leader overseeing operations, professional development, and recognition programs for organizations ranging from 20 to 300 personnel. She oversees JGA's Project Management Office, ensuring high-quality service delivery to all JGA clients.





COST PROPOSAL

SECTION C

Description	Cost
Service 1: Process Improvement	\$18,000 / process \$53,000 for 3
Service 2: Work Plan Implementation Support	\$2,200/quarterly update
Travel	Included
Materials	Printed materials invoiced at cost.

JGA will complete all the required services and tasks and complete all deliverables to the reasonable satisfaction of the City no later than December 31, 2025.

EXCLUSIONS

The following program expenses are not included in consultant fees and are the responsibility of City, if necessary.

- Venue rental fees for Workshop
- Food and beverages for Workshop

INVOICING SCHEDULE FOR EACH PROCESS IMPROVEMENT (UP TO 3):

- 33% - Upon Completion of Step 1
- 33% - Upon Completion of Step 2
- 33% - Upon Completion of Step 3

INVOICING SCHEDULE FOR WORK PLAN IMPLEMENTATION:

Quarterly invoices will be sent to the City.

The prices, specifications, and conditions covered within this proposal are satisfactory and hereby accepted. JGA is authorized to do the work as specified.

Signature: _____

Name/Title: _____

Date: _____

JACOBGREENANDASSOCIATES.COM



The costs outlined in this proposal are considered valid and binding for a period of 90 days, commencing from the date of the proposal's issuance. During this timeframe, the provided pricing and estimates for products, services, and associated expenses will remain unchanged, subject to the terms and conditions specified in the proposal document. Any modifications or alterations to the proposal, as well as adjustments to the costs, will require mutual agreement between the involved parties.