

**AMENDMENT TO AGREEMENT  
BETWEEN THE COUNTY OF SAN MATEO AND  
CASCADIA CONSULTING GROUP, INC.**

THIS AMENDMENT TO THE AGREEMENT, entered into this \_\_\_\_ day of \_\_\_\_\_, 2016, by and between the COUNTY OF SAN MATEO, hereinafter called "County," and Cascadia Consulting Group, Inc., hereinafter called "Contractor";

**W I T N E S S E T H:**

WHEREAS, pursuant to Government Code, Section 31000, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof;

WHEREAS, the parties entered into an Agreement for curriculum development and resource conservation course delivery for the Sustainability Academy (formerly known as the RecycleWorks Volunteer Academy) on September 11, 2015; and

WHEREAS, the parties wish to amend the Agreement, revising details of the scope of work to the contract.

**NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES HERETO AS FOLLOWS:**

1. Section 3. Term is deleted in its entirety and replaced with a new Section 4. Term to read as follows:

In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A, County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B. County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is unacceptable. The term of the Agreement is through June 30, 2017 in an amount not to exceed \$186,558, with the option to extend the term through June 30, 2018 and increase the amount to not exceed \$283,072. In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or expiration.

2. Section 4. Term is deleted in its entirety and replaced with a new Section 4. Term to read as follows:

Subject to compliance with all terms and conditions, the term of this Agreement is

through June 30, 2017, with the option to further extend the term through June 30, 2018. To exercise the option to extend the term of the contract through June 30, 2018, Contractor must notify the County in writing no later than January 31, 2017.

3. "Exhibit A" Proposed Services and Fees is deleted in its entirety and replaced with "Revised 'Exhibit A' Services and Fees (Revised 5/27/16)".
4. All other terms and conditions of the agreement dated [September 11, 2015], between the County and Contractor shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto, by their duly authorized representatives, have affixed their hands.

COUNTY OF SAN MATEO

By: \_\_\_\_\_  
President, Board of Supervisors, San Mateo County

Date: \_\_\_\_\_

ATTEST:

By: \_\_\_\_\_  
Clerk of Said Board

[Cascadia Consulting Group, Inc.]



Contractor's Signature

Date: 6/15/16

### **Revised “Exhibit A” Services and Fees (Revised 5/27/16)**

In consideration of the payments set forth in Exhibit B, Contractor shall provide the following services:

For the purpose of maximizing the value of outcomes for the course participants and to meet the goals of the Sustainability Academy program, the Office of Sustainability (County) and Contractor Consulting Group, Inc. (Contractor) will coordinate on the Scope of Work outlined below.

- Scope 1: Course Curriculum
- Scope 2: Course Coordination and Instruction
- Scope 3: Outreach
- Scope 4: Volunteer Appreciation Events
- Scope 5: County Fair
- Scope 6: Project Management
- Scope 7: Reporting
- Scope 8: Venue Coordination
- Scope 9: Online Educational Resources Development and Implementation

The details of each scope section are provided below. For all scope sections, County staff will provide guidance and coordination to the Contractor to help ensure the goals of the Office of Sustainability and program are met.

The scope detailed here are for Sustainability Academy services for FY2015-2016, FY2016-2017, and potentially FY2017-2018. The Contractor's Sustainability Academy services for FY2017-2018 will be contingent on the approval of an extension of the agreement for the additional fiscal year.

Total budget under this agreement for each fiscal year is summarized in the table below:

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18 (optional)</b>	<b>Total for All Three Fiscal Years</b>
<b>Total Budget</b>	\$87,502	Up to \$99,056	Up to \$96,514	Up to \$283,072

#### **Scope 1: Course Curriculum**

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
<b>Budget (labor only)</b>	\$24,735	Up to \$36,252	Up to \$29,032
<b>Anticipated hours to complete</b>	236	Up to 385	Up to 308
<b>Expenses</b>	\$0	Up to \$500	Up to \$500

The Contractor shall coordinate with County staff to combine and modify existing curricula – and in some cases design new curricula – to support the cohort structure under the Sustainability Academy for FY2015-2016, FY2016-2017, and potentially FY2017-2018.

#### **Scope 1a – Master Course Cohorts Curriculum**

The Contractor shall develop and update curriculum for two 8-week in-class Master Course cohorts – 1) Master Compost and Solid Waste Course and/or 2) Master Resource Conservation Course – that will build a strong community of informed volunteers that have the skills and expertise they need to teach others about resource conservation in San Mateo County.

Contingent on funding sources, the Contractor may develop and update the curriculum for one or both Master Course cohorts for each of the three fiscal years. The County staff will work closely with the Contractor in the beginning of each fiscal year to detail the Sustainability Academy program year's offerings.

To facilitate this process, the Contractor shall include in each cohort a content on community-based social marketing (CBSM) techniques, based on the work of the creator of CBSM, Doug McKenzie-Mohr.

The curriculum for each cohort shall also include structured time in each class for students to develop and share plans for the volunteer projects that they will embark on after class. These volunteer projects will be centered on sharing the knowledge students learn with others in the community and encouraging behavior change. The Contractor shall frame this structured volunteer project planning time with CBSM prompts, and shall encourage students to consider the diverse audiences they will be communicating with.

During the three fiscal years, the Contractor shall develop and update student workbooks for the relevant cohort. Throughout the program years, where relevant, the Contractor shall build on this basic workbook, incorporating materials like more detailed information and resources about each major point of the course curriculum, and names and descriptions of programs in San Mateo County where participants can learn more about their subject matter of interest.

The Contractor shall combine the existing curriculum and/or develop a new curriculum as follows for each cohort. "Curriculum" under this project includes at a minimum the following:

- PowerPoint presentations;
- Course descriptions;
- Course curriculum outline (also known as the Instructor Manual);
- Student workbooks; and
- Other materials that instructors use to plan and teach each course.

The Contractor shall provide drafts of the updated curriculum to County staff for review, and shall incorporate relevant feedback provided by County staff into the draft curriculum. The Contractor shall develop and submit all draft course material to the County staff with sufficient time for County staff to review and for the Contractor to incorporate County staff's feedback to finalize the draft course material. The Contractor shall provide final versions of the workbooks and curriculum to the County by the end of the contract period.

The Contractor shall modify the existing curricula for each of the 8-week in-class Master Course cohorts for the relevant fiscal years. Example topics for inclusion in the Master Compost and Solid Waste Course cohort shall include composting and solid waste. Example topics for inclusion in the Master Resource Conservation Course cohort shall include but will not be limited to solid waste, energy, water, pollution prevention, green building, and transportation.

The Contractor shall be responsible for identifying and recruiting the cohort leads for each relevant fiscal year. The time allocated to identifying and recruiting the cohort lead shall be outside the scope of this agreement. The cohort leads shall be experienced instructors who are experts in their fields and have a track record of success and professionalism.

#### Scope 1b – Resource Conservation 101 Webinars

The Contractor shall update the existing Resource Conservation 101 curriculum to be appropriate for a webinar platform and to include current trends and topics in resource conservation as necessary for each of the relevant fiscal years.

#### Scope 1c – Single Session Workshops

The Single Session Workshops are intended to provide students from the cohorts with a deeper dive into subjects that the cohort introduces. These workshops may also serve as opportunities to introduce new community members to the Sustainability Academy program. Example topics for the single session workshop shall include but will not be limited to green building, green business, green homes, and other appropriate topics.

The Contractor shall also ensure that the content provided in the single session workshops are not duplicative of content already provided in the curriculum developed for the two cohorts. The single session workshops shall be planned around hands-on learning, including potential field trips and/or tours relevant to the subject areas.

#### **Scope 2: Course Coordination and Instruction**

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
<b>Budget (labor only)</b>	\$21,537	Up to \$20,946	Up to \$21,324
<b>Anticipated hours to complete</b>	205	Up to 268	Up to 268
<b>Expenses</b>	\$2,900	Up to \$3,420	Up to \$3,420

The Contractor shall present two Master Course sessions each fiscal year. Contingent on funding sources, the two Master Course sessions may be either 1) two Master Compost and Solid Waste Courses OR 2) one Master Compost and Solid Waste Course and one Master Resource Conservation Course. The County staff will work closely with the Contractor in the beginning of each fiscal year to detail the Sustainability Academy program year's offerings.

In addition to the Master Courses, details of other events and Sustainability Academy offerings are provided in Table 4 below.

**Table 4 – Course and Event Schedule for FYs 2015-2016, 2016-2017, and 2017-2018**

<b>Course Title</b>	<b>Number of Classes/FY</b>	<b>Hours per Class/FY</b>	<b>Total Hours/FY</b>	<b>Approximate Course Date(s)</b>
<b>Master Compost and Solid Waste Course and/or Master Resource Conservation Course</b>	16	3	48	Fall/Spring of each fiscal year
<b>Resource Conservation 101 Webinars</b>	To be determined. Contingent on funding availability	To be determined. Contingent on funding availability	Up to 6 hours, if funding is available	Spread throughout fall and spring for each relevant fiscal year. Specific numbers of webinars, hours for each webinar, and their dates to be determined based on funding availability.
<b>Single Session Workshops</b>	To be determined. Contingent on funding availability	To be determined. Contingent on funding availability	Up to 8 hours, if funding is available	Spread throughout fall and spring for each relevant fiscal year. Specific dates to be determined. Specific numbers of workshops, hours for each workshop, and their dates to be determined based on funding availability.

<b>Volunteer Appreciation Events</b>	N/A	N/A	N/A	Two events in each fiscal year. Specific dates to be determined.
<b>County Fair</b>	N/A	N/A	N/A	June (County Fair) of each fiscal year

For each Master Course cohort and for each of the single session workshops, when relevant and for relevant fiscal years, the Contractor and/or its subcontractors shall complete all of the services detailed in the RFP, including the following:

- Identifying and recruiting instructors and guest speakers;
- Setting up and tearing down for each class, including supplying a laptop, projector (audio video equipment if not provided by the venue), tables and chairs, etc.;
- Providing teaching and support materials and supplies, including curriculum print outs, a projector, white board, writing materials, course participatory giveaways or other materials as needed for each course. The Contractor shall develop an itemized list of materials for each course and provide all materials that are identified;
- Guest speaker gifts/honorarium;
- Coordinating and implementing food/beverage planning, purchase and logistics;
- Working closely with County staff to identify the venues for each session, ensuring that each venue can support hands-on activities and other special needs related to each class. The Contractor shall coordinate all the venue specifics, including parking and directions for attendees, confirming AV availability and classroom set up, and addressing any additional needs; and
- Developing, distributing, and assessing pre- and post-course surveys, as well as surveys for each class.

Class times will vary and may be daytime or evening, weekdays or weekends. The Contractor shall work with County staff to develop a schedule for the classes to be offered during each of the three fiscal years.

The Contractor shall also prepare and perform quarterly program evaluations by compiling data that are collected for each course. This data shall include registration numbers, attendance numbers, the results of pre- and post-course surveys, and the results of class-by-class surveys. If these quarterly program evaluations reveal opportunities for improvement, the Contractor shall work with County staff to modify training approaches.

County staff will provide the following support to the Contractor under this scope section:

- Funds for venue booking for each Master Course cohort and for each of the single session workshops.

Classroom coordination and instruction details specific to each course are indicated in the subsections that follow.

#### Scope 2a – Course Coordination and Instruction – Master Course Cohorts

One instructor shall be responsible for coordinating each Master Course cohort, and shall bring in subject matter expertise as indicated in Scope 1a – Master Course Cohorts Curriculum above. The lead instructor for each cohort shall be responsible for setting up and breaking down each class, and shall distribute and collect all required paperwork to students, like waivers, pre-and post-course and class-specific surveys, and volunteer project proposals. The lead instructor shall also be responsible for maintaining consistency in messaging and class structure from week to week, shall strive to maintain a sense of camaraderie in the class in order to produce engaged,

motivated volunteers that carry out projects that impact their community in a meaningful way. The Contractor will also work with both of the Master Course cohort leads to ensure that, when appropriate, the same message is conveyed to the lead instructors for communication to the participants of the courses (e.g., volunteer engagement process, County Fair information, etc.).

For each Master Course cohort, the lead instructor shall invite guest speakers, when/if appropriate, including other subject matter experts to help augment the course and past Sustainability Academy volunteers to share their experiences with the new Sustainability Academy group in volunteering at events/initiating their own projects.

Courses shall be interactive, contain hands-on demonstrations and applications, and give students the opportunity to demonstrate the knowledge that they have acquired during the course.

#### Scope 2b – Course Coordination and Instruction – Resource Conservation 101 Webinars

While the curriculum for the Resource Conservation 101 course already exists, the Contractor shall work with County staff to modify the curriculum as necessary for the webinar format for relevant fiscal years, the Contractor will update the curriculum content as needed. Appropriate topics for the webinars shall be discussed, vetted and confirmed with County staff for each relevant fiscal year. Webinar curriculum update and instructions services will be contingent on funding availability. The County staff will work closely with the Contractor in the beginning of each fiscal year to detail the Sustainability Academy program year's offerings.

For each webinar class, the Contractor team shall:

- Provide a reliable and commonly utilized webinar medium to conduct the webinars;
- Provide interactive polling and Q&A to keep audience connected;
- Feature a feedback survey, which the webinar will prompt students to take immediately upon completion of webinar; and
- Record webinars for future use and/or archiving.

#### Scope 2c – Course Coordination and Instruction – Single Session Workshops

The single session workshops are intended to provide cohort students with a deeper look at subject matter related to their Master Course cohort. However, these workshops could also serve volunteers who completed past Sustainability Academy courses, introduce and recruit new students to the Sustainability Academy program, and educate other interested individuals in the county. As detailed in Scope 1c – Single Session Workshops above, the sessions shall cover green building, green business, green homes, and other appropriate topics. Appropriate topics for the workshops shall be discussed, vetted and confirmed with County staff for each relevant fiscal year. Workshop curriculum development and instructions services will be contingent on funding availability. The County staff will work closely with the Contractor in the beginning of each fiscal year to detail the Sustainability Academy program year's offerings.

#### Scope 3: Outreach

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
<b>Budget (labor only)</b>	\$9,664	Up to \$4,992	Up to \$5,152
<b>Anticipated hours to complete</b>	95	Up to 50	Up to 50
<b>Expenses</b>	\$1,000	\$0	\$0

The Contractor shall coordinate with County staff to generate a strategic outreach, recruitment, and volunteer engagement plan during FY 2015-2016 that builds upon lessons learned in the first

year working on this program (FY 2014-2015). This strategic plan shall be revisited and updated as needed in the beginning of each subsequent fiscal year (FYs 2016-2017 and potentially 2017-2018) to reflect best practices from previous year's program implementation. Then, the Contractor shall work with County program marketing personnel to implement this plan each fiscal year.

For outreach and recruitment, the Contractor shall engage its internal marketing team to support and provide strategic guidance to the County's program marketing personnel. Contractor's marketing team has specific expertise in managing effective social media campaigns; designing clear, aesthetically pleasing, and effective print material, presentations, and pamphlets; gaining earned media by developing press releases and blog content for community publications and websites; and recruiting program participants. Contractor's marketing team shall also develop relevant marketing materials (e.g., flyers, brochures, etc.) for the different Sustainability Academy offerings throughout each fiscal year. Contractor shall also make personal contact with volunteers via email and phone prior to the start of each class to ensure high attendance.

The Contractor's plan for sustaining volunteer engagement shall focus on the lead cohort instructors. Once the lead instructor for each cohort has established strong working relationships with their students, the Contractor shall leverage these relationships to continue to engage volunteers in tabling events, workshops, volunteer appreciation events, and even in sharing relevant follow-up information like articles or upcoming related workshops in the county.

#### **Scope 4: Volunteer Appreciation Events**

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
<b>Budget (labor only)</b>	\$4,431	Up to \$5,282	Up to \$5,470
<b>Anticipated hours to complete</b>	50	Up to 48	Up to 48
<b>Expenses</b>	\$1,000	Up to \$2,000	Up to \$2,000

The Contractor's project manager and the lead instructors for each Master Course cohort shall collaborate to plan and conduct two volunteer appreciation events each fiscal year that are tailored to the interests of the students who complete the cohorts. The Contractor shall research and provide input on ideas for activities to be hosted at the events (e.g., guest speakers, topic areas, dinner, film, tour, etc.). Instructors shall provide input related to the type of event that would resonate with their students, and shall reach out to students to invite them to the event.

The Contractor's project manager shall coordinate event logistics as necessary, including booking a venue, coordinating audio needs, planning and purchasing food and beverages, booking a speaker and/or hands on activities, obtaining and distributing volunteer awards, providing speaker compensation, providing other supplies to support the events, and incorporating messaging from County staff.

County staff will provide the following support to the Contractor under this scope section:

- Funds for venue booking, if applicable, for each appreciation event

#### **Scope 5: County Fair**

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
<b>Budget (labor only)</b>	\$4,788	Up to \$2,187	Up to \$2,262
<b>Anticipated hours to complete</b>	58	Up to 17	Up to 17
<b>Expenses</b>	\$500	Up to \$500	Up to \$500



For this scope item, the Contractor shall focus on expanding the activities and collateral in the County's tabling arsenal to extend beyond compost, and cover more of the subjects that the Master Course cohorts include. The Contractor's project manager and the lead instructors for each cohort shall work together to develop tabling collateral (e.g., displays, demos) that volunteers can use as teaching tools during their tabling events. The Contractor shall suggest that one or more volunteers develop and build the tabling collateral as part of their cohort project. The Contractor shall take the initiative to coordinate meetings with Sustainability Academy volunteers for developing the tabling collateral and provide any needed support, when appropriate, to help the volunteers successfully put together the tabling collateral. The Contractor shall keep County staff up-to-date on the progress of the development of the tabling collateral and proactively seek County staff's feedback and direction when needed. The Contractor shall, working with the volunteers and County staff, install and remove the tabling collateral for the 10-day San Mateo County Fair, held at the San Mateo County Event Center during the month of June each year. County staff will work directly with the volunteers to coordinate other potential events where they can display and engage with the public.

#### **Scope 6: Project Management**

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
<b>Budget (labor only)</b>	\$6,929	Up to \$13,361	Up to \$13,761
<b>Anticipated hours to complete</b>	62	Up to 105	Up to 105
<b>Expenses</b>	\$0	\$0	\$0

The Contractor shall ensure the success of this program by providing strong project management throughout the project. The Contractor shall conduct the project kickoff meeting to confirm project goals and finalize the project approach, training objectives, timeline, budget, and roles and responsibilities. The Contractor's project team manager, the Master Course cohort lead instructors, and any other relevant key team member shall all attend this kick-off meeting. Throughout the project, the Contractor's project manager shall ensure that the team takes initiative and proactively executes all project tasks on schedule within the contract budget, and at the highest quality. Contractor shall work closely with County staff and its team members to collaborate and scale project management appropriately to meet project needs.

#### **Scope 7: Reporting**

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
<b>Budget (labor only)</b>	\$8,240	Up to \$4,517	Up to \$4,652
<b>Anticipated hours to complete</b>	82	Up to 40	Up to 40
<b>Expenses</b>	\$0	\$0	\$0

The Contractor shall provide quarterly progress reports that summarize a number of metrics related to the Sustainability Academy for the previous quarter, including number of students recruited, number of students attending courses, progress towards defined student learning outcomes, number of volunteer hours completed, student satisfaction with cohort curriculum, and efficiency of project management and communication. With feedback from County staff, the Contractor shall collect much of the information for these assessments through a series of student surveys that gauge both knowledge and satisfaction with the curriculum. The Contractor shall survey students before and after each class, and at the beginning and end of each course.

#### **Scope 8: Venue Coordination**

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
--	-------------------	-------------------	-------------------

<b>Budget (labor only)</b>	\$1,800	Up to \$1,690	Up to \$1,760
<b>Anticipated hours to complete</b>	20	Up to 15	Up to 15
<b>Expenses</b>	\$0	\$0	\$0

With support from County staff, the Contractor will research and secure appropriate venues for the Master Course cohorts, workshops, and volunteer appreciation events.

County staff will provide the following support to the Contractor under this scope section:

- Support in identifying an initial list of potential venues in San Mateo County for each cohort, for each of the single session workshops, and for each of the volunteer appreciation events.

#### **Scope 9: Online Educational Resources Development and Implementation**

	<b>FY 2015-16</b>	<b>FY 2016-17</b>	<b>FY 2017-18</b>
<b>Budget (labor only)</b>	\$0	Up to \$3,409	Up to \$6,680
<b>Anticipated hours to complete</b>	0	Up to 28	Up to 55
<b>Expenses</b>	\$0	\$0	\$0

The Contractor shall provide recommendations and different options for developing online educational resources to be integrated into the existing RecycleWorks/OOS website. The Contractor shall then work with County staff to develop the online educational resources to integrate into the RecycleWorks/OOS website platform.