

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

Cover Page

-
- 1a.** Intentionally Omitted
- 1b.** AC Contract No.: OC-005277
Original Records Database Contract No.: OC-005277
- 2.** Approved Service Order No. **5**
- 3.** Consultant's Name: Alliance Resource Consulting LLC ("Consultant")
-
- 4.** Project Name: SJ Retirement Boards Chief Investment Officer("Project")
- 5.** Project Location: City of San Jose (Office of Retirement Services - 1737 N 1st Street, San Jose, CA 95112)
- 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.
-
- 7.** Budget/Fiscal:
- | | | |
|---|----|---------|
| a. Current unencumbered amount in Master Agreement: | \$ | 232,000 |
| b. Maximum Service Order Compensation for this Approved Service Order: | \$ | 41,000 |
| c. New unencumbered balance in Master Agreement (7.a – 7.b): | \$ | 191,000 |
- 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 encumbered to pay for this Approved Service Order.
- | | | | |
|-----------------|----------------|----------------|-------------------------|
| Fund: _____ 134 | Appn: 77098316 | RC: _4052_____ | Amount: \$ _41,000_____ |
| Fund: _____ | Appn: _____ | RC: _____ | Amount: \$ _____ |
| Fund: _____ | Appn: _____ | RC: _____ | Amount: \$ _____ |
-

Authorized Signer:

Benjie Chua-Foy
Benjie Chua-Foy

Email: Benjie.Chua-Foy@sanjoseca.gov
Date: 10/23/2025 PDT

8. Managing Department Approval:

John Flynn
John Flynn

Email: john.flynn@sanjoseca.gov
Date: 10/23/2025 PDT

9. Consultant Approval:

Sherrill Uyeda

Email: suyeda@alliancerc.com
Date: 10/23/2025 PDT

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:

(Sr.) Deputy City Attorney

11. City Director Approval:

Aram Kouyoumdjian
Aram Kouyoumdjian

Email: Aram.Kouyoumdjian@sanjoseca.gov
Date: 10/24/2025 PDT

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. The Consultant agrees that all services and deliverables required by this **Attachment A** are for the Boards of Administration for the Federated City Employees' Retirement System and the Police and Fire Department Retirement Plan in their recruitment of a Chief Investment Officer.

General Description of Project for which Consultant will Provide Services: The consultant will provide executive recruitment services for one (1) SJ Retirement Boards Chief Investment Officer.

Task No. 1: Recruitment

A. Services:

a. CONSULTANT shall:

- i. Develop a candidate profile, position description and applicant qualifications based on information provided by the Retirement Boards Joint Personnel Committee.
- ii. The candidate profile, position description, and applicant qualifications will be used as the basis for the solicitation of potential candidates.

b. CONSULTANT shall:

- i. Prepare a recruitment brochure for the position and present the draft to the Retirement Boards Joint Personnel Adhoc Committee for review and approval prior to printing; and
- ii. Develop advertisements and place the advertisements for publication in magazines, journals, newsletters, websites, job bulletins, and resources deemed appropriate by CONSULTANT and the Retirement Boards Joint Personnel Adhoc Committee.

c. CONSULTANT shall:

- i. Identify individuals to target and send invites to target list of individuals.
- ii. Make direct contact with targeted individuals in comparable organizations at the appropriate level. These invitations will be followed up with direct phone calls to potential candidates to gauge interest.
- iii. Attract top candidates both locally and nationwide who best satisfy the requirements and qualifications of the position through fair and effective solicitations.
- iv. Advertise and provide outreach to engage a diverse candidate pool.
- v. Execute a direct mail campaign for the position by distributing copies of the recruitment brochure to a targeted audience and key professional associations.
- vi. Select quality candidates for consideration from past CONSULTANT searches.

B. Deliverable: The Consultant will provide the following to the City's Contract Manager: Consultant will prepare a recruitment brochure, place advertisements and send invites to target list of individuals.

C. Completion Time: The Consultant must complete the services and deliverables for this task in accordance with whichever one of the following times is marked:

- ☒ On or before the following date: January 16, 2026_____.
- ☐ On or before ____ Business Days from _____.

Task No. 2: Candidate Evaluation

A. Services: The Consultant will complete a screening and assessment process which includes:

- a. Review, acknowledge and evaluate all resumes and other supporting materials received from all candidates.
- b. Screen applications using standard methods, including verification of credentials, qualifications, and ranking recommendations; and evaluate candidates against the approved candidates profile, position description, and applicant qualifications.
- c. Identify the most promising candidates for the position, based on the position profile, and CONSULTANT shall conduct preliminary screening interviews and background checks with those candidates, CONSULTANT shall conduct screening interviews.
- d. Prepare a client progress report for the Retirement Boards Joint Personnel Committee that contains a summary of the results of the recruitment process and recommends the candidates whose backgrounds and experiences closely match the requirements of the position, which will include a profile of each candidate's experience, skills assessment, and analysis of strengths and weaknesses.
- e. Meet with the Retirement Boards Joint Personnel Committee to review the client progress report and assist the Retirement Boards Joint Personnel Committee in selecting a group of five (5) to ten (10) finalists for the position for further evaluation.
- f. Design a selection process for the identified finalist candidates. CONSULTANT shall provide Retirement Boards Joint Personnel Committee with interviewing and selection tips, suggested interview questions and rating forms.
- g. Conduct readiness sessions with finalist candidates
- h. Prepare all materials needed to conduct interviews and provide them to Retirement Boards Joint Personnel Committee prior to interview day for review and approval.
- i. Schedule interviews and invite candidates for interview and provide candidates with all necessary instructions to prepare for the interview day.
- j. Attend the interviews and facilitate the interview process.
- k. Schedule final interviews and invite final candidates for interview and provide candidates with all necessary instructions to prepare for the interview day.

B. Deliverable: The Consultant will provide the following to the City's Contract Manager: Weekly client progress reports and a final client summary report will be provided.

C. Completion Time: The Consultant must complete the services and deliverables for this task in accordance with whichever one of the following times is marked:

- ☒ On or before the following date: February 27, 2026.
- ☐ On or before Business Days from .

Task No. 3: Completion of Reference/Background Checks and Position Closure

A. Services:

- a. CONSULTANT shall notify the City's contract manager that the candidates have been notified to move forward with references.
- b. CONSULTANT shall conduct reference checks of the top two (2) to four (4) candidates for the position as directed by City's contract manager and obtain background checks from a licensed firm (including credit report, court records check, driving record, academic degree confirmation, and newspaper article search), as directed by City's contract manager. The findings of these efforts will be presented to the Retirement Boards Joint Personnel Adhoc Committee in two separate, confidential reports.
- c. CONSULTANT will assist in interviews and negotiations with final candidate.

- B. Deliverable:** The Consultant will provide the following to the City's Contract Manager: Consultant shall conduct Reference and Background Checks and assist in each position closure. Consultant will provide two separate, confidential background reports. Consultant will assist in negotiations.
- C. Completion Time:** The Consultant must complete the services and deliverables for this task in accordance with whichever one of the following times is marked:
- ☒ On or before the following date: __March 31, 2026_____.
- ☐ On or before ____ Business Days from _____.

Task No. 4: Additional In-person meeting #1

- A. Services:** At the request of the Joint Personnel Committee or the Boards, the CONSULTANT may be requested to attend an additional in-person meeting #1. This could be for anything related to the recruitment activity, including but not limited to: additional interview or recruitment support
- B. Deliverable:** The CONSULTANT will attend in-person meeting with the appropriate committee or board.
- C. Completion Time:** The Consultant must complete the services and deliverables for this task in accordance with whichever one of the following times is marked:
- ☒ On or before the following date: _March 31, 2026_____.
- ☐ On or before ____ Business Days from _____.

Task No. 5: Additional In-person meeting #2

- A. Services:** At the request of the Joint Personnel Committee or the Boards, the CONSULTANT may be requested to attend an additional in-person meeting #2. This could be for anything related to the recruitment activity, including but not limited to: additional interview or recruitment support
- B. Deliverable:** The CONSULTANT will attend in-person meeting with the appropriate committee or board.
- C. Completion Time:** The Consultant must complete the services and deliverables for this task in accordance with whichever one of the following times is marked:
- ☒ On or before the following date: _March 31, 2026_____.
- ☐ On or before ____ Business Days from _____.

Attachment B: Terms and Conditions

1. **City's Contract Manager:** The City's contract manager for this Approved Service Order is:

Name: John Flynn	Phone No.408-794-1050:
Department: Office of Retirement Services	Email:John.Flynn@sanjoseca.gov
Address: 1737 N. 1 st St., Suite 600 San José, CA 95112	

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: Sherrill Uyeda	Phone No.: 562-901-0769				<u>X</u>
Address: 1 Centerpointe Drive, Suite 440, La Palma, CA 90623	Email: suyeda@alliancerc.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 **cannot** 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.n/a no subconsultants will be used	
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	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$ 12,333
2	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$ 12,333
3	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$ 12,334
4	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$ 2,000
5	☐ Time & Materials	☒ Fixed Fee	☐ Monthly	☒ Completion of Task(s)	☐ Completion of Work	\$ 2,000
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):						NTE \$41,000

20251016 Service Order - SJ Retirement Boards Chief Investment Officer Recruitment - Alliance-CR

Created:	10/23/2025
Status:	Signed
Transaction ID:	b6d045bd-dd21-437f-89c6-a3c936245c9a

"20251016 Service Order - SJ Retirement Boards Chief Investment Officer Recruitment - Alliance-CR" history

-  John Flynn created the document
10/23/2025 9:21:09 AM PDT
-  Document was emailed to
10/23/2025 9:21:10 AM PDT
-  opened the document
10/23/2025 1:30:54 PM PDT
-  signed the document
10/23/2025 1:31:05 PM PDT
-  Document was emailed to John Flynn
10/23/2025 1:31:06 PM PDT
-  John Flynn opened the document
10/23/2025 5:04:29 PM PDT
-  John Flynn signed the document
10/23/2025 5:04:43 PM PDT
-  Document was emailed to Benjie Chua-Foy
10/23/2025 5:04:44 PM PDT
-  Benjie Chua-Foy opened the document

10/23/2025 5:05:39 PM PDT



Benjie Chua-Foy signed the document

10/23/2025 5:05:56 PM PDT



Document was emailed to Aram Kouyoumdjian

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Aram Kouyoumdjian opened the document

10/24/2025 4:23:52 PM PDT



Aram Kouyoumdjian signed the document

10/24/2025 4:24:24 PM PDT



Document was successfully signed and filed

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