

## PROFESSIONAL SERVICES TASK ORDER

### TASK ORDER FY23-4.19 Disaster Recovery Preparedness

Consultant shall perform the Services detailed below in accordance with all the terms and conditions of the Agreement referenced in Item 1A below. All exhibits referenced in Item 8 below are incorporated into this Task Order by this reference. The Consultant shall furnish the necessary facilities, professional, technical and supporting personnel required by this Task Order as described below.

---

CONTRACT NO. C21179340

OR PURCHASE ORDER REQUISITION NO. (AS APPLICABLE)

- 1A. MASTER AGREEMENT NO. (MAY BE SAME AS CONTRACT / P.O. NO. ABOVE):
- 1B. TASK ORDER NO.: FY23-4.19
2. CONSULTANT NAME: Baker Tilly US, LLP
3. PERIOD OF PERFORMANCE: START: ~~March 1~~ May 22, 2023 COMPLETION: ~~June 30~~ November 30, 2023
- 4 TOTAL TASK ORDER PRICE: \$87,500  
BALANCE REMAINING IN MASTER AGREEMENT/CONTRACT \$ TBD
5. BUDGET CODE \_\_\_\_\_  
COST CENTER \_\_\_\_\_  
COST ELEMENT \_\_\_\_\_  
WBS/CIP \_\_\_\_\_  
PHASE \_\_\_\_\_
6. CITY PROJECT MANAGER'S NAME & DEPARTMENT:  
Greg Tanaka, Chair of the City Council's Policy and Services Committee
7. DESCRIPTION OF SCOPE OF SERVICES (Attachment A)  
MUST INCLUDE:
- SERVICES AND DELIVERABLES TO BE PROVIDED
  - SCHEDULE OF PERFORMANCE
  - MAXIMUM COMPENSATION AMOUNT AND RATE SCHEDULE (*as applicable*)
  - REIMBURSABLE EXPENSES, if any (with "not to exceed" amount)
8. ATTACHMENTS: A: Task Order Scope of Services B (if any): N/A

**I hereby authorize the performance of the work described in this Task Order.**

**I hereby acknowledge receipt and acceptance of this Task Order and warrant that I have authority to sign on behalf of Consultant.**

**APPROVED:**  
CITY OF PALO ALTO

**APPROVED:**  
COMPANY NAME: \_\_\_\_\_

BY: \_\_\_\_\_  
Name \_\_\_\_\_  
Title \_\_\_\_\_  
Date \_\_\_\_\_

BY: \_\_\_\_\_  
Name \_\_\_\_\_  
Title \_\_\_\_\_  
Date \_\_\_\_\_

## Attachment A DESCRIPTION OF SCOPE OF SERVICES

### Introduction

Attachment A, the Description of Scope of Services, contains the following four (4) elements:

- Services and Deliverables To Be Provided
- Schedule of Performance
- Maximum Compensation Amount and Rate Schedule (*As Applicable*)
- Reimbursable Expenses, if any (With “Not To Exceed” Amount)

### Services & Deliverables

#### **Disaster Recovery Assessment**

Baker Tilly’s approach to conducting a disaster recovery assessment involves four (4) primary steps:

- Step 1: Assessment Planning and Kick-off
- Step 2: Information Gathering
- Step 3: Disaster Recovery Analysis and Recommendations
- Step 4: Reporting

#### Step 1 – Assessment Planning and Kick-off

This step consists of the tasks performed to adequately plan the work necessary to address the overall assessment objective and to solidify mutual understanding of the assessment scope, objectives, assessment process, and timing between stakeholders and assessors. Tasks include:

- Baker Tilly will work with the City to finalize the assessment scope and project timeline. Baker Tilly will also provide the City with an initial interview and documentation request list.
- Finally, Baker Tilly will perform a project kick-off discussion with the City to ensure alignment with the project timeline, interview schedule, and deliverables.

#### Step 2 – Information Gathering

This step involves conducting interviews with identified IT security personnel and key stakeholders to gain an understanding of the operating environment and understand the desired outcome of the disaster recovery plan.

Baker Tilly will also review current IT disaster recovery policy and procedure documentation, as well as review current infrastructure in place.

### Step 3 – Disaster Recovery Analysis and Recommendations

This step involves assessing the documentation of current disaster recovery plan for high priority application and supporting infrastructure to identify the adequacy of the documentation and identify additional documentation requirements.

Baker Tilly will perform a gap assessment between the current disaster recovery capabilities, desired disaster recovery strategy, and industry best practices.

Baker Tilly develop recommendation to remediate the identified documentation and capability gaps.

Baker Tilly will provide recommendations to update the disaster recovery documentation to address the gaps identified.

### Step 4 – Reporting

The project team will perform tasks necessary to finalize the initial draft disaster recovery assessment report and review a draft report with the stakeholders. Additionally, the team will submit a final assessment report to the City. Tasks include:

- Develop findings, conclusions, and recommendations based on the supporting evidence gathered
- Validate findings with the appropriate individuals
- Distribute a draft assessment report and conduct a closing meeting with key stakeholders
  - Discuss the assessment results, findings, conclusions, and recommendations
- Obtain written management responses and finalize a report

### Deliverables:

The following deliverable will be prepared as part of this engagement:

- Disaster Recovery Assessment Report

### Schedule of Performance

Anticipated Start Date: ~~March 1~~ May 22, 2023

Anticipated End Date: ~~June 30~~ November 30, 2023

### Maximum Compensation Amount and Rate Schedule

The not-to-exceed maximum, inclusive of reimbursable expenses (as summarized below) for this Task is \$87,500. The not-to-exceed budget is based on an estimate of 400 total project hours, of which 20 are estimated to be completed by the City Auditor.

## Reimbursable Expenses

If circumstances allow, Baker Tilly anticipates planning one on-site fieldwork. The maximum compensation amount reflected above will be inclusive of any travel related expenses.

Note that, if current restrictions associated with COVID-19 continue, an on-site visit may not be possible. The project team will work with the City to consider circumstances at the time.