

Board Office Use: <b>Legislative File Info.</b>	
File ID Number	25-1440
Introduction Date	06-25-2025
Enactment Number	
Enactment Date	



**OAKLAND UNIFIED  
SCHOOL DISTRICT**

*Community Schools, Thriving Students*

# Memo

**To** Board of Education

**From** Kyla Johnson-Trammell, Superintendent  
Preston Thomas, Chief, Systems & Services Officer,

**Board Meeting Date** June 25, 2025

**Subject** Amendment No. 1 General Services Agreement– Lowe Consulting Group, Inc. – Facilities Planning & Management Project - Division of Facilities Planning and Management

**Action Requested** Approval by the Board of Education of Amendment No. 1, to the General Services Agreement by and between the **District and Lowe Consulting Group, Inc., Oakland, CA**, for the latter to continue to provide labor compliance services with an increased focus on connecting OUSD Skilled Trades graduates to union sponsorship opportunities, and assisting the District in managing labor relations and coordinating youth employment programs for the **Facilities Planning and Management Project**, in an additional amount of **\$250,910.00**, increasing the total not-to-exceed amount of Agreement from **\$183,810.00** to **\$434,720.00**, which includes a contingency fee of **\$22,810.00**, and extending the term of the Agreement from **June 27, 2024, through June 30, 2025, to June 30, 2026** (an additional 365 days). All other terms and conditions of the Agreement remain in full force and effect.

**Discussion** This Amendment is for on going labor compliance consulting services and an extension of an additional 365 days of the term of the Agreement.

**LBP (Local Business Participation Percentage)** 100.00%

**Recommendation** Approval by the Board of Education of Amendment No. 1, to the General Services Agreement by and between the District and Lowe Consulting Group, Inc., Oakland, CA, for the latter to continue to provide labor compliance services with an increased focus on connecting OUSD Skilled Trades graduates to union sponsorship opportunities, and assisting the District in managing labor relations and coordinating youth employment programs for the Facilities Planning and Management Project, in an additional amount of \$250,910.00, increasing the total not-to-exceed amount of Agreement from \$183,810.00 to \$434,720.00, which includes a contingency fee of \$22,810.00, and extending the term of the Agreement from June 27, 2024, through June 30, 2025, to June 30, 2026 (an additional 365 days). All other terms and conditions of the Agreement remain in full force and effect.

**Fiscal Impact** Fund 21 Building Fund, Measure Y

**Attachments**

- Amendment No.1, including Exhibits
- Routing Form
- File Id: 24-1668 & 22-1992

## AMENDMENT NO. 1

### GENERAL SERVICES Agreement

This Amendment is entered into between the Oakland Unified School District and **Lowe Consulting Group, Inc.** ("Contractor") to amend the **General Services Agreement** between the District and the Contractor dated **June 27, 2024** ("Agreement"), for the **Facilities Planning and Management Project** ("Project"), as set forth below and in the Exhibit A attached hereto and incorporated herein by this reference:

**1. Services:** ☒ The scope of work is unchanged. ☐ The scope of work has changed.  
**If scope of work changed:** Provide brief description of revised scope of work including description of expected final results, such as services, materials, products, and/or reports; attach additional pages as necessary.  
 The CONTRACTOR agrees to provide the following amended services: Continue to provide Labor Compliance Services for the District, as described in the May 5, 2025, proposal attached to this Amendment as Exhibit A.

**2. Terms (duration):** ☐ The term of the contract is unchanged. ☒ The term of the contract has changed.  
**If term is changed:** The contract term is extended by an additional three hundred thirty-five (365) days, and the amended expiration date is June 30, 2026. The current end date of the agreement is June 30, 2025.

**3. Compensation:** ☐ The contract price is unchanged. ☒ The term of the contract has changed.  
**If the compensation is changed:** The not-to-exceed contract price is  
☒ Increased by Two Hundred fifty Thousand Nine Hundred Ten Dollars (\$250,910.00).  
☐ Decreased by \_\_\_\_\_ dollars and no/100 (\$\_\_\_\_\_).  
 Prior to this amendment, the not to exceed contract price was One Hundred Eighty Three Thousand Eight Hundred Ten Dollars and No/100 (\$183,810.00 ), and after this the contract price will be Four Hundred Thirty-Four Thousand Seven Hundred Twenty Dollars and no/100 (\$434,720.00).

**4. Amendment History:**

☒ There are no previous amendments to this Agreement. ☐ This contract has previously been amended as follows:

No.	Date	General Description of Reason for Amendment	Amount of Increase (Decrease)
			\$

- 5. No Further Modifications.** Except as expressly modified by this Amendment, all other terms and condition of the Agreement remain unmodified and in full force and effect. In the event of any conflict between this Amendment and the Agreement, the terms of this Amendment shall control.
- 6. Entire Agreement.** This Amendment, together with the Agreement and any prior amendments thereto, constitutes the entire agreement between the parties concerning the Project and the subject matter hereof and superseded any prior or contemporaneous oral or written discussions, representations, or agreements regarding the same. No modification or waiver of any provision of this Amendment shall be binding unless in writing and signed by both parties.
- 7. Approval:** This Amendment is not effective, and no payment shall be made to Contractor based on this Amendment, until it is signed by Contractor and approved by the Board of Education.
- 8. Authority.** Each party represents and warrants that is has full legal authority to enter into this Amendment and that the individuals executing this Amendment on behalf of the respective parties have been duly authorized to do so.

**OAKLAND UNIFIED SCHOOL DISTRICT**

\_\_\_\_\_  
Jennifer Brouhard, President,  
Board of Education

\_\_\_\_\_  
Date

\_\_\_\_\_  
Kyla Johnson-Trammell, Superintendent  
Secretary Board of Education

\_\_\_\_\_  
Date

• 

05/28/2025

Preston Thomas (May 28, 2025 22:52 PDT)

\_\_\_\_\_  
Preston Thomas, Chief Systems & Services  
Officer,

\_\_\_\_\_  
Date

**Approval as to form:**



\_\_\_\_\_  
James Traber, Esq.  
Facilities Counsel

05/22/2025

\_\_\_\_\_  
Date

**CONTRACTOR: LOWE CONSULTING, INC**



5/16/2025

\_\_\_\_\_  
Contractor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Andrea Lowe, President

\_\_\_\_\_  
Print Name, Title

**EXHIBIT “A”**  
**Scope of Work for Amendment**

**Contractor Name: Lowe Consulting Group, Inc.**

- 1. Detailed Description of Services to be provided: Continue to provide Labor Compliance Services for the District, as described in the May 5, 2025, proposal attached to this Amendment as Exhibit A.
- 2. Specific Outcomes:
- 3. Alignment with District Strategic Plan: Indicate the goals and visions supported by the services of this contract:

<input type="checkbox"/> Ensure a high quality instructional core	<input type="checkbox"/> Prepare students for success in college and careers
<input type="checkbox"/> Develop social, emotional and physical health	<input checked="" type="checkbox"/> Safe, healthy and supportive schools
<input checked="" type="checkbox"/> Create equitable opportunities for learning	<input checked="" type="checkbox"/> Accountable for quality
<input type="checkbox"/> High quality and effective instruction	<input type="checkbox"/> Full-service community district

# **LOCAL BUSINESS PARTICIPATION WORKSHEET - LBU Modification / Amendment**

☐ LBU Not Impacted  
(LBU Compliance Verification Only)

PRIME: Lowe Consulting Group      Original Contract Amount (Base Bid): \$ 250,910.00  
 Project: Facilities Planning & Management      Originally Proposed LBU %: 100 %  
 Project #: 0918      **Amendment/Change Order No.:** 1  
 Project Manager: Pam Henderson      Total Contract Amount (Amended Contract, to Date): 434,720.00  
 Date: 05/13/20      Proposed LBU %: 100 %

Small, Local Business Enterprise(s)/ Small Emerging, Local Business Enterprise(s):	Total Dollar Amount of Work	LBE %	SLBE%	SLBRE%	Certification Type & No.
<b>PRIME Company:</b> Lowe Consulting Group Address: 520 3rd Street, Suite 105 City/State: Oakland, CA Phone: 510.986.1100	\$ 434,720.00	%	%	100.00 %	
<b>Company:</b> Address: City/State: Phone:	\$ 0.00	%	%	%	
<b>Company:</b> Address: City/State: Phone:	\$ 0.00	%	%	%	
<b>Company:</b> Address: City/State: Phone:	\$ 0.00	%	%	%	
<b>Company:</b> Address: City/State: Phone:	\$ 0.00	%	%	%	
<b>Company:</b> Address: City/State: Phone:	\$ 0.00	%	%	%	
<b>Company:</b> Address: City/State: Phone:	\$ 0.00	%	%	%	
	\$ 434,720.00	0.00 %	0.00 %	100.00 %	100.00 %

**TIFFANY KNUCKLES**

May 13, 2025

APPROVAL- LBU Compliance Officer

Note: Local Business Participation documentation must be approved and included in contract amendment documentation, where LBU is impacted.

Updated January 2024



LCG

LOWE CONSULTING  
GROUP INC.

520 3<sup>rd</sup> Street, Suite 105  
Oakland CA 94607  
510.986.1100  
www.lowecg.com

**CONTRACT AMENDMENT**

May 5, 2025

Ms. Kenya Chatman, Director of Facilities  
Oakland Unified School District  
955 High Street  
Oakland, CA 94601

**Subject: Existing Contract Amendment for Professional Services - Labor Compliance Consultant, Project Labor Agreement Administration**

Dear Ms. Chatman:

This letter is to request an amendment to our existing contract to continue our Labor Compliance Services contract for the term July 1, 2025, through June 30, 2026. During the upcoming contract year, we will increase our focus on connecting OUSD Skilled Trades graduates with union sponsorship opportunities identifying OUSD graduates currently working on District projects and promoting all of these local hire success stories and key performance indicators (KPIs) on the Oakland Built facilities website.

We remain committed to supporting the oversight of all Project Labor Agreement (PLA) provisions, if you have questions or require additional information, please do not hesitate to contact us.

Sincerely,

Andrea Lowe, President & CEO  
Lowe Consulting Group, Inc.

C: *Pamila Millet-Henderson, Project Manager*



LCG

LOWE CONSULTING  
GROUP INC.

## KEY PERFORMANCE INDICATORS (KPIs)

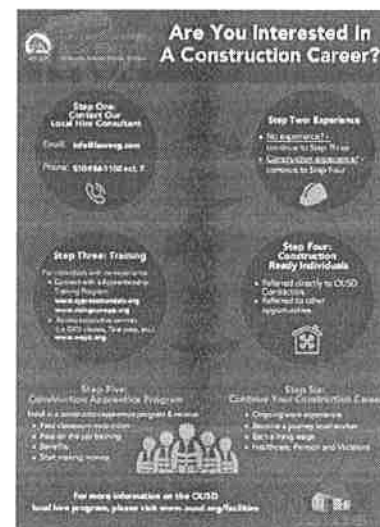
Outlined below are the KPIs that we will measure for each of the PLA task areas.

### Managing Labor Relations

- Minimize union grievances and if any are submitted resolve prior to Step
- Host one-on-one meetings with non-union contractors to review key PLA provisions: core workers provisions, payments of fringe benefits, and trust fund contributions.
- Ensure all PLA project documents are transferred to District file sharing platform at the end of each project.
- Ensure contractors at all tiers attend a pre-job meeting prior to starting work on the project and are apprised of all PLA and local hire requirements.
- Ensure quarterly meetings of the JAC are held and a quorum is present for each.

### Coordinating the PLA's workforce development and employment programs

- Conduct a minimum of 2 construction career outreach presentations to increase awareness of the construction industry as a viable, high wage-earning industry.
- Update and maintain contact lists of workforce development organizations.
- Develop local hire success stories to market on Facilities page of the District website. Other data may include graphic depiction of: % of hours worked by Oakland residents, wages earned by Oakland residents, OUSD students participating in skilled trades events.
- Number of OUSD pre-apprentices referred to unions and/or contractors for sponsorship



### Monitoring & Reporting

- Monitor compliance with local hire goals and request corrective action plans at 30% project completion. Conduct weekly project site visits/observations to identify contractors working on-site and compare data against certified payroll information.
- Review contractor off-site credit reports to identify hours worked by Oakland residents on non-OUSD projects.
- Provide monthly activity reports to the Facilities Director and Project Managers highlighting local hire compliance, corrective action plans, and Good Faith Efforts made by contractors.
- Prepare final close-out reports within 30 days of Notice of Completion

## SCHEDULE OF BILLING RATES & ASSOCIATED COSTS

**PROFESSIONAL FEES:** LCG proposes billing a flat fee of \$19,000 per month. Should tasks arise that would require a level of effort above and beyond the hours delineated below, we would seek written approval from District staff and tasks would be billed at the staff rates delineated. The anticipated level of effort to support each task is as follows:

Lowe Consulting Group, Inc. COST PROPOSAL 2025 - 2026										
Name	Category/Title	Direct Rate	Andrea Lowe Principal in Charge	Maribel Alejandre PLA Co-Lead	Lailani Ison PLA Admin	Danielle M. Lewis Workforce Mgr	Jorge Gonzalez Site Visit Lead	Total Hours Per Task	Total Costs Per Task	Contingency per Task
Core Responsibilities 1:	Managing Labor Relations		96	192	96	0	0	384	47100	\$4,710
Core Responsibilities 2:	Coordinating Innovative Workforce Development & Employment Programs Monitoring & Reporting on the Efficacy of the PLA inclusive of project site visits		24	0	0	192	0	216	31800	\$3,180
Core Responsibilities 3:	Project Meetings & Other Tasks (as needed)		48	192	144	96	384	864	88900	\$8,890
			50	120	90	95	192	547	60300	\$6,030
TOTAL HOURS			218	504	330	383	576			
			PROPOSED FEE per Year:							\$228,100
			CONTINGENCY @ 10%							\$22,810
			Not-to Exceed Fee Year 2							\$250,910



## DIVISION OF FACILITIES PLANNING & MANAGEMENT ROUTING FORM

### Project Information

<b>Project Name</b>	Facilities Planning & Management Project	<b>Site</b>	918
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### Basic Directions

**Services cannot be provided until the contract is awarded by the Board or is entered by the Superintendent pursuant to authority delegated by the Board.**

<b>Attachment Checklist</b>	<input checked="" type="checkbox"/> Proof of general liability insurance, including certificates and endorsements, if contract is over \$15,000 <input checked="" type="checkbox"/> Workers compensation insurance certification, unless vendor is a sole provider
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### Contractor Information

Contractor Name	Lowe Consulting Group, Inc.	Agency's Contact	Andrea Lowe				
OUSD Vendor ID #	006139	Title	Manager				
Street Address	675 Hegenberger Road, Suite 228	City	Oakland	State	CA	Zip	94621
Telephone	510-986-1100	Policy Expires					
Contractor History	Previously been an OUSD contractor? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
OUSD Project #	00918						

### Term of Original/Amended Contract

<b>Date Work Will Begin (i.e., effective date of contract)</b>	06-26-2025	<b>Date Work Will End By (not more than 5 years from start date; for construction contracts, enter planned completion date)</b>	
		<b>New Date of Contract End (If Any)</b>	6-30-2026

### Compensation/Revised Compensation

<b>If New Contract, Total Contract Price (Lump Sum)</b>	\$	<b>If New Contract, Total Contract Price (Not To Exceed)</b>	\$
<b>Pay Rate Per Hour (If Hourly)</b>	\$	<b>If Amendment, Change in Price</b>	\$ 250,910.00
<b>Other Expenses</b>		<b>Requisition Number</b>	

### Budget Information

*If you are planning to multi-fund a contract using LEP funds, please contact the State and Federal Office before completing requisition.*

Resource #	Funding Source	Org Key	Object Code	Amount
9657/0000	Fund 21, Measure Y	210-9657-0-0000-8500-6289-918-9180-9906-9999-99999	6289	\$250,910.00

### Approval and Routing (in order of approval steps)

Services cannot be provided before the contract is fully approved and a Purchase Order is issued. Signing this document affirms that to your knowledge services were not provided before a PO was issued.

	<b>Division Head</b>	<b>Phone</b>	510-535-7038	<b>Fax</b>	510-535-7082
<b>1.</b>	<b>Executive Director, Facilities</b>				
	<b>Signature</b>	<b>Date Approved</b>			
<b>2.</b>	<b>OUSD General Counsel, Facilities</b>				
	<b>Signature</b> <i>James Traber</i>	<b>Date Approved</b>	05/22/2025		
	<b>Chief Systems &amp; Services Officer</b>				
<b>3.</b>	<b>Signature</b> <i>Preston Thomas</i>	<b>Date Approved</b>	05/28/2025		
	<b>Chief Financial Officer</b>				
<b>4.</b>	<b>Signature</b>	<b>Date Approved</b>			
	<b>President, Board of Education</b>				
<b>5.</b>	<b>Signature</b>	<b>Date Approved</b>			



Board Office Use: <b>Legislative File Info.</b>	
File ID Number	24-1668
Introduction Date	06-26-2024
Enactment Number	24-1353
Enactment Date	6/26/2024 er



# Memo

**To** Board of Education

**From** Kyla Johnson-Trammell, Superintendent; Preston Thomas, Chief Systems and Services Officer, Division of Facilities Planning and Management; Kenya Chatman, Executive Director of Facilities Planning

**Board Meeting Date** June 26, 2024

**Subject** General Services Agreement – Lowe Consulting Group, Inc. – Facilities Planning & Management Project - Division of Facilities Planning and Management

**Action Requested** Approval by the Board of Education of General Services Agreement by and between the District and **Lowe Consulting Group, Inc., Oakland CA**, for the latter to provide Project Labor Agreement services, assisting the District with managing labor relations, coordinating the PLA’s innovative workforce development and employment programs, and monitoring and reporting on the efficacy of the PLA for **Facilities Planning and Management**, for a **total not-to-exceed amount of \$183,810.00**, which includes a not-to-exceed amount of **\$167,00.00, for Basic Services**, and a not-to-exceed amount of \$16,710.00 for Additional Services, as the selected consultant, with work scheduled to commence on June 27, 2024, and scheduled to last until June 30, 2025, pursuant to the Agreement.

**Discussion** This agreement is for the administration of the Project Labor Agreement (PLA).

**LBP** (Local Business Participation Percentage) 100.00%

**Recommendation** Approval by the Board of Education of General Services Agreement by and between the District and Lowe Consulting Group, Inc., Oakland CA, for the latter to provide Project Labor Agreement services, assisting the District with managing labor relations, coordinating the PLA’s innovative workforce development and employment programs, and monitoring and reporting on the efficacy of the PLA for Facilities Planning and Management, for a total not-to-exceed amount of \$183,810.00, which includes a not-to-exceed amount of \$167,00.00, for Basic Services, and a not-to-exceed amount of \$16,710.00 for Additional Services, as the selected consultant, with work scheduled to commence on June 27, 2024, and scheduled to last until June 30, 2025, pursuant to the Agreement.

**Fiscal Impact** Fund 21 Building Fund, Measure Y

**Attachments**

- Agreement and Exhibits
- Justification Form
- Certificate of Insurance
- Routing Form



## CONTRACT JUSTIFICATION FORM

**This Form Shall Be Submitted to the Board Office With Every  
Agenda Contract.**

**Legislative File ID No.** 24-1668

**Department:** Division of Facilities Planning and Management

**Vendor Name:** Lowe Consulting Group, Inc.

**Project Name:** Facilities Planning & Management Project

**Project No.:** 0918

**Contract Term:** Intended Start: June 27, 2024

Intended End: June 30, 2025

**Total Cost Over Contract Term:** \$183,810.00

**Approved by:** Preston Thomas

**Is Vendor a local Oakland Business or has it met the requirements of the**

**Local Business Policy?** ☒ Yes (No if Unchecked)

**How was this contractor or vendor selected?**

By selection through the RFP/Q process.

**Summarize the services or supplies this contractor or vendor will be providing.**

Lowe Consulting Group is currently the administrator for the Oakland Unified School District's Project Labor Agreement (PLA), covering more than \$500 Million in school modernization projects. This is an innovative PLA that includes a Social Justice program focused on the hiring of local residents. LCG is responsible for managing the PLA and assisting the District in monitoring prevailing wages on an as-needed basis. Monitoring the utilization of local resident apprentices is an important element of the program.

**Was this contract competitively bid?**

☐

Check box for "Yes" (If "No," leave box unchecked)

If "No," please answer the following questions:

1) How did you determine the price is competitive?

Lowe Consulting Group was evaluated as the most qualified.

2) Please check the competitive bidding exception relied upon:

Construction Contract:

- ☐ Price is at or under UPCCAA threshold of \$60,000 (as of 1/1/19)
- ☐ CMAS contract [may only include “incidental work or service”] (Public Contract Code §§10101(a) and 10298(a)) – *contact legal counsel to discuss if applicable*
- ☐ Emergency contract (Public Contract Code §§22035 and 22050) – *contact legal counsel to discuss if applicable*
- ☐ No advantage to bidding (including sole source) – *contact legal counsel to discuss if applicable*
- ☐ Completion contract – *contact legal counsel to discuss if applicable*
- ☐ Lease-leaseback contract RFP process – *contact legal counsel to discuss if applicable*
- ☐ Design-build contract RFQ/RFP process – *contact legal counsel to discuss if applicable*
- ☐ Energy service contract – *contact legal counsel to discuss if applicable*
- ☐ Other: \_\_\_\_\_ – *contact legal counsel to discuss if applicable*

Consultant Contract:

- ☐ Architect, engineer, construction project manager, land surveyor, or environmental services – selected (a) based on demonstrated competence and professional qualifications (Government Code §4526), **and** (b) using a fair, competitive RFP selection process (Government Code §§4529.10 et seq.)
- ☐ Architect or engineer *when state funds being used* – selected (a) based on demonstrated competence and professional qualifications (Government Code §4526), (b) using a fair, competitive RFP selection process (Government Code §§4529.10 et seq.), **and** (c) using a competitive process consistent with Government Code §§4526-4528 (Education Code §17070.50)
- ☒ Other professional or specially trained services or advice – no bidding or RFP required (Public Contract Code §20111(d) and Government Code §53060) – *contact legal counsel to discuss if applicable*
- ☐ For services other than above, the cost of services is \$109,300 or less (as of 1/1/23)
- ☐ No advantage to bidding (including sole source) – *contact legal counsel to discuss if applicable*

Purchasing Contract:

- ☐ Price is at or under bid threshold of \$109,300 (as of 1/1/23)
- ☐ Certain instructional materials (Public Contract Code §20118.3)
- ☐ Data processing systems and supporting software – choose one of three lowest bidders (Public Contract Code §20118.1)

- ☐ Electronic equipment – competitive negotiation (Public Contract Code §20118.2) – *contact legal counsel to discuss if applicable*
- ☐ CMAS contract [may only include “incidental work or service”] (Public Contract Code §§10101(a) and 10298(a)) – *contact legal counsel to discuss if applicable*
- ☐ Piggyback contract for purchase of personal property (Public Contract Code §20118) – *contact legal counsel to discuss if applicable*
- ☐ Supplies for emergency construction contract (Public Contract Code §§22035 and 22050) – *contact legal counsel to discuss if applicable*
- ☐ No advantage to bidding (including sole source) – *contact legal counsel to discuss if applicable*
- ☐ Other: \_\_\_\_\_

Maintenance Contract:

- ☐ Price is at or under bid threshold of \$109,300 (as of 1/1/23)
- ☐ No advantage to bidding (including sole source) – *contact legal counsel to discuss*
- ☐ Other: \_\_\_\_\_

3) Explain in detail the facts that support the applicability of the exception marked above:

- The desired services require specialized training and professional services to provide the knowledge and expertise necessary to administer the PLA.

## OAKLAND UNIFIED SCHOOL DISTRICT GENERAL SERVICES AGREEMENT

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This general services agreement (“Agreement”) is made and entered into effective **June 27, 2024** (the “Effective Date”), by and between the Oakland Unified School District (“District”) and **Lowe Consulting Group, Inc.** (“Contractor” and together with District, the “Parties”).

1. **Contractor Services.** Contractor agrees to provide the following services to District (collectively, the “Basic Services”): provide professional services as the Labor Compliance Consultant to administer the District’s Project Labor Agreement (“PLA”) as further described in **Exhibit A** to this Agreement). Contractor shall provide services other than Basic Services (i.e., “Additional Services”) if directed in writing by District to perform specific Additional Services and if sufficient contract funds for Additional Services remain to pay for the directed Additional Services (see Section 5, below). “Services” shall mean Basic and Additional Services. Contractor agrees to perform such Services as expeditiously as is consistent with professional skill and care and the orderly progress of the Services. All services performed by the Contractor under this Agreement shall be conducted in a manner consistent with the level of care and skill ordinarily exercised by **Lowe Consulting Group, Inc.** consultants specially qualified to provide the services required by the District.
2. **Contractor Qualifications.** Contractor represents and warrants to District that Contractor, and all of Contractor’s employees, agents or volunteers (the “Contractor Parties”), have in effect and shall maintain in full force throughout the Term of this Agreement all licenses, credentials, permits and any other qualifications required by law to perform the Services and to fully and faithfully satisfy all of the terms set forth in this Agreement. Contractor and any Contractor Parties performing Services shall be competent to perform those Services.
3. **Term.** The term for performance of the Services shall begin on **June 27, 2024**, and shall end on **June 30, 2025** (“Term”), except as otherwise stated in Section 4 below, and Contractor shall complete the Services within the Term. There shall be no extension of the Term without an amendment signed by all Parties and approved by the District’s governing board. Written notice by the District Superintendent or designee shall be sufficient to stop further performance of the Services by Contractor or the Contractor Parties. In the event of early termination, Contractor shall be paid for satisfactory Services performed to the date of termination. Upon payment by District, District shall be under no further obligation to Contractor, monetarily or otherwise, and District may proceed with the work in any manner District deems proper.
4. **Termination.** District may terminate this Agreement at any time by giving thirty (30) days advance written notice to the other Party. Notwithstanding the foregoing, District may terminate this Agreement at any time by giving written notice to Contractor if (1) Contractor materially breaches any of the terms of this Agreement; (2) any act or omission of Contractor or the Contractor Parties exposes

District to potential liability or may cause an increase in District's insurance premiums; (3) Contractor is adjudged a bankrupt; (4) Contractor makes a general assignment for the benefit of creditors; (5) a receiver is appointed because of Contractor's insolvency; or (6) Contractor or Contractor Parties fail to comply with or make material representations as to the fingerprinting, criminal background check, and/or tuberculosis certification sections of this Agreement. Such termination shall be effective immediately upon Contractor's receipt of the notice.

5. **Payment of Fees for Services.** District agrees to pay Contractor based on the hourly rates listed in ***Exhibit B*** for Services satisfactorily performed. Contractor shall not increase these hourly rates over the course of this Agreement. Total fees paid by District to Contractor for Services under the Agreement shall not exceed **One Hundred Eighty-Three Thousand Eight Hundred Ten Dollars (\$183,810.00)**, which consists of a not-to-exceed amount of **One Hundred Sixty-Seven Thousand One Hundred Dollars (\$167,100.00)** for performance of the Basic Services, and a not-to-exceed contingency amount of **Sixteen Thousand Seven Hundred and Ten Dollars (\$16,710.00)** for performance of any Additional Services. Contractor acknowledges that the not-to-exceed fee for Basic Services, above, includes contingency compensation in the event that more time and costs may be necessary to complete the Basic Services. Contractor shall perform all Basic Services required by the Agreement even if the not-to-exceed amount for performance of the Services has already been paid and no more payments will be forthcoming. District agrees to make payment within sixty (60) days of receipt of a detailed invoice from Contractor based on hours worked and hourly rates, including any additional supporting documentation that District reasonably requests. Contractor shall not submit its invoices to District more frequently than monthly. Contractor will not be compensated for any Basic or Additional Services required as a result of wrongful acts or omissions.

5.1 **Reimbursement for Certain Expenses.** Contractor shall not be reimbursed directly for any of its expenses, as the fees to be paid under this Agreement include compensation for any and all of Contractor's expenses.

6. **Indemnity.** Contractor shall defend, indemnify, and hold harmless District and its agents, representatives, officers, consultants, employees, Board of Trustees, members of the Board of Trustees (collectively, the "District Parties"), from and against any and all claims, demands, liabilities, damages, losses, suits and actions, and expenses (including, but not limited to attorney fees and costs including fees of consultants) of any kind, nature and description (collectively, the "Claims") directly or indirectly arising out of, connected with, or resulting from any act, error, omission, negligence, or willful misconduct of Contractor, the Contractor Parties or their respective agents, subcontractors, employees, material or equipment suppliers, invitees, or licensees in the performance of or failure to perform Contractor's obligations under this Agreement, including, but not limited to Contractor's or the Contractor Parties' use of the site, Contractor's or the Contractor Parties' performance of the Services, Contractor's or the Contractor Parties' breach of any of the representations or warranties contained in this Agreement, or for injury to or death of persons or damage to property or delay or damage to the District or the District Parties. Such obligation shall not be construed to negate, abridge, or reduce other rights or obligations of indemnity, which would otherwise exist as to a party, person, or entity described in this paragraph. The indemnification provided for in this Section 6 includes, without limitation to the foregoing, claims that may be made against District by any taxing authority asserting that an employer-employee relationship exists by reason of this Agreement, and any claims made against District alleging civil rights violations by Contractor or Contractor Parties under the California Fair Employment and



Housing Act ("FEHA").

7. **Equipment and Materials.** Contractor at its sole cost and expense shall provide and furnish all tools, labor, materials, equipment, transportation services and any other items (collectively, "Equipment") which are required or necessary to perform the Services in a manner which is consistent with generally accepted standards of the profession for similar services. Notwithstanding the foregoing, District shall not be responsible for any damages to persons or property as a result of the use, misuse or failure of any Equipment used by Contractor or the Contractor Parties, even if such Equipment is furnished, rented or loaned to Contractor or the Contractor Parties by District. Furthermore, District may reject any Equipment or workmanship that does not conform to the requirements of this Agreement and Contractor must then promptly remedy or replace it at no additional cost to District and subject to District's reasonable satisfaction.

8. **Insurance.** Without in any way limiting Contractor's liability, or indemnification obligations set forth in Section 6 above, Contractor shall secure and maintain throughout the Term of this Agreement the following insurance: (i) comprehensive general liability insurance with limits of not less than \$1,000,000 each occurrence and \$2,000,000 in the aggregate; (ii) commercial automobile liability insurance with limits not less than \$1,000,000 each occurrence and \$2,000,000 in the aggregate; (iii) worker's compensation insurance as required by Labor Code section 3200, *et seq.* Neither Contractor nor any of the Contractor Parties shall commence performing any portion of the Services until all required insurance has been obtained and certificates indicating the required coverages have been delivered to and approved by District. All insurance policies shall include an endorsement stating that District and District Parties are named additional insureds. All of the policies shall be amended to provide that the insurance shall not be suspended, voided, canceled, reduced in coverage or in limits except after thirty (30) days' prior written notice has been given to District. If such a notice is not given or even if District receives a notice, District may, at its sole option, terminate this Agreement. All insurance policies shall include an endorsement stating that it is primary to any insurance or self-insurance maintained by District and shall waive all rights of subrogation against District and/or the District Parties. A copy of the declarations page of Contractor's insurance policies shall be attached to this Agreement as proof of insurance.

9. **Independent Contractor Status.** The Parties agree that Contractor is free from the control and direction of District in connection with Contractor's performance of the Services. Contractor is hereby retained to provide the specified Services for District, which are outside the usual course of District's business. Contractor certifies that it is customarily engaged in an independently established trade, occupation, or business to provide the Services required by this Agreement. Contractor understands and agrees that Contractor and the Contractor Parties shall not be considered officers, employees, agents, partners, or joint venturers of District, and are not entitled to benefits of any kind or nature normally provided to employees of District and/or to which District's employees are normally entitled.

10. **Taxes.** All payments made by District to Contractor pursuant to this Agreement shall be reported to the applicable federal and state taxing authorities as required. Unless required by law, District will not withhold any money from fees payable to Contractor, including FICA (social security), state or federal unemployment insurance contributions, or state or federal income tax or disability insurance. If applicable, Contractor shall assume full responsibility for payment of all federal, state and local taxes or contributions, including unemployment insurance, social security and income taxes with respect to

Contractor and the Contractor Parties and otherwise in connection with this Agreement.

**11. Fingerprinting/Criminal Background Investigation Certification.** Contractor and the Contractor Parties shall at all times comply with the fingerprinting and criminal background investigation requirements of the California Education Code (“Education Code”) section 45125.1. Before performing any Services, Contractor shall execute and return the District’s Fingerprinting Notice and Acknowledgement form and the required certification (see *Exhibit C*).

Contractor further agrees and acknowledges that if at any time during the Term of this Agreement Contractor learns or becomes aware of additional information which differs in any way from the information learned or provided pursuant to Section 45125.1, or Contractor or Contractor Parties add personnel who will provide Services under this Agreement, Contractor shall immediately notify District and prohibit any new personnel from interacting with District students until the fingerprinting and background check requirements have been satisfied and District determines whether any interaction is permissible.

**12. Tuberculosis Certification.** Contractor and the Contractor Parties shall at all times comply with the tuberculosis (“TB”) certification requirements of Education Code section 49406. Accordingly, by checking the applicable boxes below, Contractor hereby represents and warrants to District the following:

A. ☒ Contractor and Contractor Parties will **only have limited contact or no contact** (as determined by District) with District students at all times during the Term of this Agreement.

B. ☐ The following Contractor and Contractor Parties will have **more than limited contact** (as determined by District) with District students during the Term of this Agreement and, at no cost to District, have received a TB test or risk assessment in full compliance with the requirements of Education Code section 49406:

\_\_\_\_\_  
\_\_\_\_\_. [Attach and sign additional pages, as needed.]

Contractor shall maintain on file the certificates showing that the Contractor and Contractor Parties were examined and found free from active TB. These forms shall be regularly maintained and updated by Contractor and shall be available to District upon request or audit.

Contractor further agrees and acknowledges that all new personnel hired to provide Services under this Agreement after the Effective Date of this Agreement by Contractor and Contractor Parties are subject to the TB certification requirements of Education Code section 49406 and shall be prohibited from having any contact with District students until the TB certification requirements have been satisfied and District determines whether any contact is permissible.

**13. Confidential Information.** All District information disclosed to Contractor during the course of performance of services under this Agreement shall be treated as confidential and shall not be disclosed to any other persons or parties excepts as authorized by District or required by law. Contractor shall maintain the confidentiality of, and protect from unauthorized disclosure, any and all individual student

information received from the District, including but not limited to student names and other identifying information. Contractor shall not use such student information for any purpose other than carrying out the obligations under this Agreement. Upon termination of this Agreement, Contractor shall turn over to District all educational records related to the Services provided to any District student pursuant to this Agreement.

14. **Assignment/Successors and Assigns.** Contractor shall not assign or transfer by operation of law or otherwise any or all of its rights, burdens, duties or obligations under this Agreement without the prior written consent of District. Subject to the foregoing, this Agreement shall be binding on the heirs, executors, administrators, successors, and assigns of the respective Parties.

15. **Severability.** If any provision of this Agreement shall be held invalid or unenforceable by a court of competent jurisdiction, such holding shall not invalidate or render unenforceable any other provision of this Agreement.

16. **Amendments.** The terms of this Agreement shall not be waived, altered, modified, supplemented or amended in any manner whatsoever except by written agreement signed by both Parties and approved by the District's governing board.

17. **Governing Law.** This Agreement shall be governed by and construed in accordance with the laws of the State of California, excluding its choice of law rules. Any action or proceeding seeking any relief under or with respect to this Agreement shall be brought solely in the Superior Court of the State of California for the County of Alameda, subject to transfer of venue under applicable State law, provided that nothing in this Agreement shall constitute a waiver of immunity to suit by the District.

18. **Written Notice.** Written notice shall be deemed to have been duly served if delivered in person to Contractor at the address located next to the party signatures below, or if delivered at or sent by registered or certified or overnight mail to the last business address known to the person who sends the notice.

19. **Compliance with Law.** Each and every provision of law and clause required by law to be inserted into this Agreement shall be deemed to be inserted herein and this Agreement shall be read and enforced as though it were included therein. Contractor shall comply with all applicable federal, state, and local laws, rules, regulations and ordinances, including but not limited to fingerprinting under Education Code section 45125.1 and confidentiality of records. Contractor agrees that it shall comply with all legal requirements for the performance of duties under this Agreement and that failure to do so shall constitute material breach.

20. **Non-Discrimination.** There shall be no unlawful discrimination in the contracting of persons under this Agreement because of race, color, national origin, age, ancestry, religion, sex, or sexual orientation of such persons.

21. **Attorneys' Fees.** If a party to this Agreement commences a legal action against the other party to enforce a provision of this Agreement or seek damages related to the services provided under this Agreement, the prevailing party in the legal action will be entitled to recover from the other party all of its reasonable litigation expense, costs, and fees actually incurred, including reasonable attorneys' and

experts' fees.

22. **Liability of District.** Notwithstanding anything stated herein to the contrary, District shall not be liable for any special, consequential, indirect or incidental damages, including but not limited to lost profits in connection with this Agreement.

23. **Time.** Time is of the essence for performance of the Services under this Agreement.

24. **Waiver.** No delay or omission by either Party in exercising any right under this Agreement shall operate as a waiver of that or any other right and no single or partial exercise of any right shall preclude either Party from any or further exercise of any right or remedy.

25. **Reports.** Contractor shall maintain complete and accurate records with respect to the Services rendered and the costs incurred under this Agreement, including records with respect to any payments to employees and subcontractors. All such records shall be prepared in accordance with generally accepted accounting procedures. Upon request, Contractor shall make such records available to District for the purpose of auditing and copying such records for a period of five years from the date of final payment under this Agreement.

26. **Ownership of Documents.** All plans, studies, drawings, calculations, reports, specifications, estimates, and other documents or any other works of authorship fixed in any tangible medium of expression, including but not limited to physical drawings, data magnetically or otherwise recorded on computer disks, or other writings prepared or caused to be prepared by the Contractor under this Agreement ("Documents") shall be and shall remain the property of the District for all purposes, not only as they relate or may relate to the Services but as they relate or may relate to any other project. Contractor will provide the District with a complete set of Documents, and will retain, on the District's behalf, the originals or reproducible copies of all Documents, however stored, in the Contractor's files for a period of no less than fifteen (15) years. Contractor shall promptly make available to District any original documents it has retained under this Agreement upon request by the District.

27. **Licensing of Intellectual Property.** This Agreement creates a non-exclusive and perpetual license for the District to copy, use, modify, reuse or sublicense any and all copyrights, designs and other intellectual property embodied in the Documents ("Intellectual Property") not only as they relate or may relate to the Services but as they relate or may relate to other projects. The Contractor shall require any and all subcontractors and subconsultants to agree in writing that the District is granted a similar non-exclusive and perpetual license for the Intellectual Property of such subcontractors or consultants that they provided to Contractor as part of the Services. The compensation for the Services includes compensation not only for any such use of the Intellectual Property in connection with the Services, but also for any re-use of the Intellectual Property by the District in relation to other projects. Contractor represents and warrants that Contractor has the legal right to license the Intellectual Property that Contractor, its subcontractors, or its subconsultants prepare or cause to be prepared under this Agreement.

28. **Entire Agreement.** This Agreement is intended by the Parties as the final expression of their agreement with respect to such terms as are included herein and as the complete and exclusive statement of its terms and may not be contradicted by evidence of any prior agreement or of a contemporaneous oral agreement, nor explained or supplemented by evidence of consistent additional terms.

29. **Ambiguity.** The Parties to this Agreement, and each of them, hereby represent that the language contained herein is to be construed as jointly proposed and jointly accepted, and in the event of any subsequent determination of ambiguity, all Parties shall be treated as equally responsible for such ambiguity.

30. **Execution of Other Documents.** The Parties to this Agreement shall cooperate fully in the execution of any and all other documents and in the completion of any additional actions that may be necessary or appropriate to give full force and effect to the terms and intent of this Agreement.

31. **Execution in Counterparts.** This Agreement may be executed in counterparts such that the signatures may appear on separate signature pages. A copy, facsimile, or an original, with all signatures appended together, shall be deemed a fully executed agreement.

32. **Warranty of Authority.** The persons who have signed this Agreement warrant that they are legally authorized to do so on behalf of the respective parties, and by their signatures to bind the respective parties to this Agreement.

33. **Mediation.** A party to this Agreement shall, as a condition precedent to initiating any litigation against the other party, demand mediation of any dispute. The parties shall endeavor to include any third party claimant in the mediation. The parties shall select a mediator and schedule the mediation within thirty (30) days of the initial demand for mediation. If the parties cannot agree on a mediator, the mediator shall be appointed by JAMS. The parties to the mediation, including the parties to this Agreement, shall pay equal shares of the mediator's fees. Each party shall bear its own attorney's fees related to the mediation.

34. **Forms.** Prior to performing any Services, Contractor shall prepare, execute, and submit all forms that may be required by law for this Agreement, including but not limited to disabled veteran business enterprises ("DVBE") certification (Education Code §17076.11) and an Iran Contract Act certification (Public Contract Code §2204). If a form is necessary, Contractor shall use the District's versions of these forms, which the District shall make available upon request.

35. **Sanctions in Response to Russian Aggression.** The District requires Contractor to comply with the Governor's March 4, 2022, Executive Order N-6-22 ("Order") relating to any existing sanctions imposed by the United States government and the State of California in response to Russia's actions in Ukraine, including additional requirements for contracts of \$5 million or more. Failure to comply may result in the termination of the Contract.

36. **Designation of Key Personnel.** The individuals specified in the attached *Exhibit D* shall provide the services set forth herein, and shall be the persons primarily in charge of such work. No other individuals may provide services for Contractor on the this project without first obtaining the written approval of the City Manager.

37. **Conflict of Interest.** Contractor warrants that neither Contractor nor any of its employees, agents, or subcontractors has an actual or potential conflict of interest with the District in respect to the Services to be performed under this Agreement for the District. None of such individuals shall, during this term of this Agreement, acquire any interest which conflicts, or could potentially conflict, in any



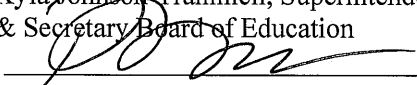
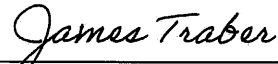
manner with the interests of the District.

38. **Notice to Proceed; Progress; Completion.** Upon execution of this Agreement by the parties and approval of it by the District's governing board, District shall give Contractor written notice to proceed with the Services. Such notice may authorize Contractor to render all of the Services contemplated herein, or such portions or phases as may be directed by the District. In the latter event, District shall, in its sole discretion, issue subsequent notices from time to time regarding further portions or phases of the Services. Upon receipt of such notices, Contractor shall diligently proceed with the Services authorized and complete it within the agreed time period.

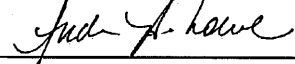
39. **California Residency.** Contractor *is* a resident of the State of California.

\* \* \* \* \*

**OAKLAND UNIFIED SCHOOL DISTRICT**

	6/27/2024
Benjamin Davis, President, Board of Education	Date
	6/27/2024
Kyla Johnson Trammell, Superintendent & Secretary Board of Education	Date
	6/12/24
Preston Thomas, Chief Systems & Services Officer, Facilities Planning and Management	Date
	6/12/24
James Traber, Esq. General Counsel, Facilities Planning and Management	Date

**LOWE CONSULTING GROUP, INC.**

	6/12/24
Signature	Date
Andrea H. Lowe, President	
Print Name, Title	

**Address for District Notices:**  
955 High Street  
Oakland, California, 94601

**Address for Contractor Notices:**  
675 Hengerberger Road, Suite 228  
Oakland, CA 94612

**EXHIBIT A**

**Scope of Services**

## **BASIC SERVICES**

The Consultant agrees to provide the Services described below:

- 1.** The Consultant shall be responsible for the professional quality and technical accuracy of all reports and other services furnished by the Consultant under the Agreement as well as design and existing conditions coordination. The Consultant shall, without additional compensation, correct or revise any errors or omissions in

### **STATEMENT OF WORK:**

The selected consultant ("Consultant") will report to the District through its Facilities Director ("FD") for guidance and direction, and render assistance to the District and FD by monitoring compliance with the Project Labor Agreement ("PLA"). The Consultant will coordinate the PLA for the program. The Consultant shall focus on three core responsibilities: (1) managing labor relations; (2) coordinating the PLA's innovative workforce development and employment programs; and (3) monitoring and reporting on the efficacy of the PLA.

[Continued on next page]



The Coordinator shall maintain and account for the hours devoted to the administration of the PLA, must provide a Weekly Activity Report which shall be submitted to the FD, and assist the FD in preparing a semiannual report to the District's Governing Board on the status of the PLA.

The core responsibility in this area will be to provide professional PLA administration services regarding the management of labor relations, as follows:

- 1.** Provide support to the District as requested by the District and/or FD to administer the PLA and to assist with PLA contract interpretations and notices.
- 2.** Assist the District in establishing policies and procedures for the PLA.
- 3.** Serve as the principal liaison on behalf of the District to the Building Trades Council and its affiliated unions.
- 4.** Ensure that the terms of the PLA are consistently applied.
- 5.** Ensure the immediate resolution of all labor disputes and grievances through coordination with the Building Trades Council and appropriate grievance and arbitration procedures in order to ensure that the rehabilitation and construction work is completed on time.
- 6.** Manage all disputes and grievances, including those during pre-job meetings, through Joint Administrative Committees, or formal grievance resolution procedures.
- 7.** Coordinate, schedule, and attend meetings between the District and the signatory unions, including pre-construction conferences to discuss craft jurisdictions and the dispatch of workers.
- 8.** Provide interim bulletins advising of scheduled pre-construction meetings and agendas for PLA items for pre-bid, pre-construction, and other meetings.
- 9.** Coordinate with contractors and subcontractors to facilitate the timely payment to appropriate trust funds as required under the Letter of Assent (LOA) and work with unions and contractors to expeditiously resolve all disputes regarding payments to trust funds.
- 10.** Liaise with the District and contractors as necessary regarding compliance with the terms of the PLA.
- 11.** Facilitate community outreach efforts as directed to assist contractors in goals of the PLA.
- 12.** Collect the Letter of Assent (LOA) from all contractors and subcontractors performing work on the projects.
- 13.** Advise the District to withhold payments as necessary.
- 14.** Represent the District at all pre-job meetings for all PLA projects in order to ensure that contractors, subcontractors, the Building Trades and their affiliated unions understand the covered project work.
- 15.** Attend meetings with District as needed to provide updates on project work, including the compliance with PLA hiring requirements, trust fund payments, and the status of any labor issues; schedule, chair and record minutes of all meetings scheduled to address issues related to the PLA hiring objectives.
- 16.** Visit District construction sites to monitor compliance of PLA by both contractors and unions, maintain files and electronic databases related to the PLA.

**EXHIBIT B**

**Hourly Rates**

## 2.4 Fee Proposal

**PROFESSIONAL FEES:** LCG proposes billing a flat fee of \$14,000 per month. Should tasks arise that would require a level of effort beyond the hours delineated below, we would seek written approval from District staff and tasks would be billed at the level of effort delineated. The anticipated level of effort to support each task is as follows:

Lowe Consulting Group, Inc. COST PROPOSAL 2024 - 2026						
	Name	Andrea Lowe	Maribel Alejandre	Melissa King-Lankford	Jorge Gonzalez	Total Hours Per Task
		Principal in Charge	PLA Co-Lead	PLA Co-lead	Site Visit Lead	
		Direct Rate	\$195.00	\$89.00	\$80.00	
Core Responsibilities 1:	Managing Labor Relations	96	192	96	0	384
Core Responsibilities 2:	Coordinating Innovative Workforce Development & Employment Programs	24	0	96	0	120
Core Responsibilities 3:	Monitoring & Reporting on the Efficacy of the PLA	48	192	456	192	888
	Project Meetings & Other Tasks (as needed)	48	48	48	192	336
TOTAL HOURS		216	432	696	384	
PROPOSED FEE per Year:						
CONTINGENCY @ 10%						
Not-to Exceed Fee Year 1-2						

**EXHIBIT C**

**Fingerprinting Notice and Acknowledgement Form**

**FINGERPRINTING NOTICE AND ACKNOWLEDGEMENT**  
**FOR ALL CONTRACTS EXCEPT WHEN CONSTRUCTION EXCEPTION IS MET**  
(Education Code Section 45125.1)

Other than business entities performing construction, reconstruction, rehabilitation, or repair who have complied with Education Code section 45125.2, business entities entering into contracts with the District must comply with Education Code sections 45125.1. Such entities are responsible for ensuring full compliance with the law and should therefore review all applicable statutes and regulations. The following information is provided simply to assist such entities with compliance with the law:

1. You (as a business entity) shall ensure that each of your employees who interacts with pupils outside of the immediate supervision and control of the pupil's parent or guardian or a school employee has a valid criminal records summary as described in Education Code section 44237. (Education Code §45125.1(a).) You shall do the same for any other employees as directed by the District. (Education Code §45125.1(c).) When you perform the criminal background check, you shall immediately provide any subsequent arrest and conviction information it receives to the District pursuant to the subsequent arrest service. (Education Code §45125.1(a).)
2. You shall not permit an employee to interact with pupils until the Department of Justice has ascertained that the employee has not been convicted of a felony as defined in Education Code section 45122.1. (Education Code §45125.1(e).) See the lists of violent and serious felonies in ***Attachment A*** to this Notice.
3. Prior to performing any work or services under your contract with the District, and prior to being present on District property or being within the vicinity of District pupils, you shall certify in writing to the District under the penalty of perjury that neither the employer nor any of its employees who are required to submit fingerprints, and who may interact with pupils, have been convicted of a felony as defined in Education Code section 45122.1, and that you are in full compliance with Education Code section 45125.1. (Education Code §45125.1(f).) For this certification, you shall use the form in ***Attachment B*** to this Notice.
4. If you are providing the above services in an emergency or exceptional situation, you are not required to comply with Education Code section 45125.1, above. An "emergency or exceptional" situation is one in which pupil health or safety is endangered or when repairs are needed to make a facility safe and habitable. The District shall determine whether an emergency or exceptional situation exists. (Education Code §45125.1(b).)
5. If you are an individual operating as a sole proprietor of a business entity, you are considered an employee of that entity for purposes of Education Code section 45125.1, and the District shall prepare and submit your fingerprints to the Department of Justice as described in Education Code section 45125.1(a).

(Education Code §45125.1(h).)

I, as President *[insert "owner" or officer title]* of Lowe Consulting Group, Inc.  
*[insert name of business entity]*, have read the foregoing and agree that Lowe Consulting Group, Inc.  
*[insert name of business entity]* will comply with the requirements of Education  
Code §45125.1 as applicable, including submission of the certificate mentioned above.

Dated: 6/12/24

Name: Andrea H. Lowe

Signature: 

Title: President

## **ATTACHMENT A**

### **Violent and Serious Felonies**

Under Education Code sections 45122.1 and 45125.1, no employee of a contractor or subcontractor who has been convicted of or has criminal proceedings pending for a violent or serious felony may come into contact with any student. A violent felony is any felony listed in subdivision (c) of Section 667.5 of the Penal Code. Those felonies are presently defined as:

- (1) Murder or voluntary manslaughter.
- (2) Mayhem.
- (3) Rape as defined in paragraph (2) or (6) of subdivision (a) of Section 261 or paragraph (1) or (4) of subdivision (a) of Section 262.
- (4) Sodomy as defined in subdivision (c) or (d) of Section 286.
- (5) Oral copulation as defined in subdivision (c) or (d) of Section 288a.
- (6) Lewd or lascivious act as defined in subdivision (a) or (b) of Section 288.
- (7) Any felony punishable by death or imprisonment in the state prison for life.
- (8) Any felony in which the defendant inflicts great bodily injury on any person other than an accomplice which has been charged and proved as provided for in Section 12022.7, 12022.8, or 12022.9 on or after July 1, 1977, or as specified prior to July 1, 1977, in Sections 213, 264, and 461, or any felony in which the defendant uses a firearm which use has been charged and proved as provided in subdivision (a) of Section 12022.3, or Section 12022.5 or 12022.55.
- (9) Any robbery.
- (10) Arson, in violation of subdivision (a) or (b) of Section 451.
- (11) Sexual penetration as defined in subdivision (a) or (j) of Section 289.
- (12) Attempted murder.
- (13) A violation of Section 18745, 18750, or 18755.
- (14) Kidnapping.
- (15) Assault with the intent to commit a specified felony, in violation of

Section 220.

- (16) Continuous sexual abuse of a child, in violation of Section 288.5.
- (17) Carjacking, as defined in subdivision (a) of Section 215.
- (18) Rape, spousal rape, or sexual penetration, in concert, in violation of Section 264.1.
- (19) Extortion, as defined in Section 518, which would constitute a felony violation of Section 186.22 of the Penal Code.
- (20) Threats to victims or witnesses, as defined in Section 136.1, which would constitute a felony violation of Section 186.22 of the Penal Code.
- (21) Any burglary of the first degree, as defined in subdivision (a) of Section 460, wherein it is charged and proved that another person, other than an accomplice, was present in the residence during the commission of the burglary.
- (22) Any violation of Section 12022.53.
- (23) A violation of subdivision (b) or (c) of Section 11418.

A serious felony is any felony listed in subdivision (c) Section 1192.7 of the Penal Code. Those felonies are presently defined as:

(1) Murder or voluntary manslaughter; (2) Mayhem; (3) Rape; (4) Sodomy by force, violence, duress, menace, threat of great bodily injury, or fear of immediate and unlawful bodily injury on the victim or another person; (5) Oral copulation by force, violence, duress, menace, threat of great bodily injury, or fear of immediate and unlawful bodily injury on the victim or another person; (6) Lewd or lascivious act on a child under the age of 14 years; (7) Any felony punishable by death or imprisonment in the state prison for life; (8) Any felony in which the defendant personally inflicts great bodily injury on any person, other than an accomplice, or any felony in which the defendant personally uses a firearm; (9) Attempted murder; (10) Assault with intent to commit rape, or robbery; (11) Assault with a deadly weapon or instrument on a peace officer; (12) Assault by a life prisoner on a non-inmate; (13) Assault with a deadly weapon by an inmate; (14) Arson; (15) Exploding a destructive device or any explosive with intent to injure; (16) Exploding a destructive device or any explosive causing bodily injury, great bodily injury, or mayhem; (17) Exploding a destructive device or any explosive with intent to murder; (18) Any burglary of the first degree; (19) Robbery or bank robbery; (20) Kidnapping; (21) Holding of a hostage by a person confined in a state prison; (22) Attempt to commit a felony punishable by death or imprisonment in the state prison for life; (23) Any felony in which the defendant personally used a dangerous or deadly weapon; (24) Selling, furnishing, administering, giving, or offering to sell, furnish, administer, or give to a minor any heroin, cocaine, phencyclidine (PCP), or any methamphetamine-related drug,



as described in paragraph (2) of subdivision (d) of Section 11055 of the Health and Safety Code, or any of the precursors of methamphetamines, as described in subparagraph (A) of paragraph (1) of subdivision (f) of Section 11055 or subdivision (a) of Section 11100 of the Health and Safety Code; (25) Any violation of subdivision (a) of Section 289 where the act is accomplished against the victim's will by force, violence, duress, menace, or fear of immediate and unlawful bodily injury on the victim or another person; (26) Grand theft involving a firearm; (27) carjacking; (28) any felony offense, which would also constitute a felony violation of Section 186.22; (29) assault with the intent to commit mayhem, rape, sodomy, or oral copulation, in violation of Section 220; (30) throwing acid or flammable substances, in violation of Section 244; (31) assault with a deadly weapon, firearm, machine gun, assault weapon, or semiautomatic firearm or assault on a peace officer or firefighter, in violation of Section 245; (32) assault with a deadly weapon against a public transit employee, custodial officer, or school employee, in violation of Sections 245.2, 245.3, or 245.5; (33) discharge of a firearm at an inhabited dwelling, vehicle, or aircraft, in violation of Section 246; (34) commission of rape or sexual penetration in concert with another person, in violation of Section 264.1; (35) continuous sexual abuse of a child, in violation of Section 288.5; (36) shooting from a vehicle, in violation of subdivision (c) or (d) of Section 26100; (37) intimidation of victims or witnesses, in violation of Section 136.1; (38) criminal threats, in violation of Section 422; (39) any attempt to commit a crime listed in this subdivision other than an assault; (40) any violation of Section 12022.53; (41) a violation of subdivision (b) or (c) of Section 11418; and (42) any conspiracy to commit an offense described in this subdivision.

## ATTACHMENT B

### Form for Certification of Lack of Felony Convictions

*Note: This form must be submitted by the owner, or an officer, of the contracting entity before it may commence any work or services, and before it may be present on District property or be within the vicinity of District pupils.*

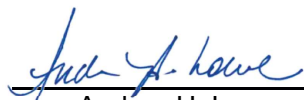
Entity Name: Lowe Consulting Group, Inc.  
Date of Entity's Contract with District: 6/12/2024  
Scope of Entity's Contract with District: Project Labor Agreement Administration

I, Andrea H. Lowe [insert name], am the President [insert "owner" or officer title] for Lowe Consulting Group, Inc. [insert name of business entity] ("Entity"), which entered a contract on 6/12, 2024, with the District for PLA Administration.

I certify that (1) pursuant to Education Code section 45125.1(f), neither the Entity, nor any of its employees who are required to submit fingerprints and who may interact with pupils, have been convicted of a felony as defined in Education Code section 45122.1; and (2) the Entity is in full compliance with Education Code section 45125.1, including but not limited to each employee who will interact with a pupil outside of the immediate supervision and control of the pupil's parent or guardian having a valid criminal background check as described in Education Code section 44237.

I declare under penalty of perjury that the foregoing is true and correct to the best of my knowledge.

Date: 6/12, 20 24

Signature:   
Typed Name: Andrea H. Lowe  
Title: President  
Entity: Lowe Consulting Group, Inc.



LOWECON-02

DWATTS

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

4/26/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # 0603247 George Petersen Insurance Agency, Inc. P.O. Box 3539 Santa Rosa, CA 95402	CONTACT NAME:		
	PHONE (A/C, No, Ext): (707) 525-4150	FAX (A/C, No): (707) 525-4175	
	E-MAIL ADDRESS: info@gpins.com		
INSURED  Lowe Consulting Group, Inc. 675 Hegenberger Road, Suite 228 Oakland, CA 94621	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A : Ohio Security Insurance Company		24082
	INSURER B : Admiral Insurance Company		24856
	INSURER C :		
	INSURER D :		
	INSURER E :		
	INSURER F :		

## COVERAGES

## CERTIFICATE NUMBER:

## REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	X		BLS55875044	1/14/2024	1/14/2025	EACH OCCURRENCE	\$ 2,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 500,000
							MED EXP (Any one person)	\$ 15,000
							PERSONAL & ADV INJURY	\$ 2,000,000
							GENERAL AGGREGATE	\$ 4,000,000
							PRODUCTS - COMP/OP AGG	\$ 4,000,000
								\$
A	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			BAS55875044	1/14/2024	1/14/2025	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below		N / A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/>	
							E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$
B	Professional Liab			EO000026321-10	1/14/2024	1/14/2025	Each/Aggregate	2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

RE: Independent Consultant Agreement Oakland, CA

Oakland Unified School District and its Governing Board, agents, representatives, employees, trustees, officers, consultants, and volunteers are named Additional Insured with respects to General Liability, per CG 88 10 04 13, including Primary Wording; attached.

## CERTIFICATE HOLDER

## CANCELLATION

Oakland Unified School District, Attn: Facilities Department 955 High Street Oakland, CA 94621	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

04/26/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Automatic Data Processing Insurance Agency, Inc.  1 Adp Boulevard Roseland NJ 07068	<b>CONTACT NAME:</b> Automatic Data Processing Insurance Agency, Inc. <b>PHONE (A/C, No, Ext):</b> 1-800-524-7024 <b>FAX (A/C, No):</b> <b>E-MAIL ADDRESS:</b>  <b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Sequoia Insurance Company <b>INSURER B:</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>	<b>NAIC #</b> 22985
<b>INSURED</b> Lowe Consulting Group Inc.  675 Hegenberger Rd  Oakland CA 94621		

**COVERAGES****CERTIFICATE NUMBER:** 3603353**REVISION NUMBER:**

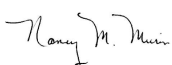
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG \$ \$ \$ \$ \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident) \$ \$ \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE  DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE AGGREGATE \$ \$ \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> Y	N/A	N	QWC1347292	03/22/2024	03/22/2025 <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES** (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

RE: Independent Consultant Agreement fo PLA Administration

**CERTIFICATE HOLDER****CANCELLATION**

Oakland Unified School District, Attn: Facilities Department 955 High Street  Oakland CA 94601	<b>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</b>  <b>AUTHORIZED REPRESENTATIVE</b> 
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# 2.5 Additional Data

## 3 L/SL/SLRBE Exhibit D



Oakland Unified School District  
Local Business Utilization



### LOCAL BUSINESS PARTICIPATION WORKSHEET

Prime	Local Business Group, Inc.
Project Name	Local Business Group, Inc.
Project Number	20218
Proposed Total Contract Amount	\$182,810

Bid Opening Date	
Time	
Project Manager	
Architect	

BASE BID AMOUNT	\$167,100
Proposed Total SLRBE Amount (%)	100

Small, Local Business Enterprise(s) (Small Business Enterprise)	Total Amount of Contract (in \$1,000s)	Local Business Enterprise (LBE)	Small, Local Business Enterprise (SLBE)	Small, Local Business Enterprise Percentage (SLBE)
Contract Name: <u>Contract Agency</u> <u>Love Counseling Group, Inc. City of Oakland</u> Address: <u>City/State</u> <u>675 Hightower Road, Oakland, CA 94621</u> Contract No. <u>(if available)</u>	183810			183810
Contract Name: <u>Contract Agency</u> Address: <u>City/State</u> Contract No. <u>(if available)</u>				
Contract Name: <u>Contract Agency</u> Address: <u>City/State</u> Contract No. <u>(if available)</u>				
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## DIVISION OF FACILITIES PLANNING & MANAGEMENT ROUTING FORM

### Project Information

<b>Project Name</b>	Facilities Planning & Management Project	<b>Site</b>	918
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### Basic Directions

**Services cannot be provided until the contract is awarded by the Board or is entered by the Superintendent pursuant to authority delegated by the Board.**

<b>Attachment Checklist</b>	<input checked="" type="checkbox"/> Proof of general liability insurance, including certificates and endorsements, if contract is over \$15,000 <input checked="" type="checkbox"/> Workers compensation insurance certification, unless vendor is a sole provider
-----------------------------	---

### Contractor Information

Contractor Name	Lowe Consulting Group, Inc.	Agency's Contact	Andrea Lowe				
OUSD Vendor ID #	006139	Title	Manager				
Street Address	675 Hegenberger Road, Suite 228	City	Oakland	State	CA	Zip	94621
Telephone	510-986-1100	Policy Expires					
Contractor History	Previously been an OUSD contractor? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
OUSD Project #	00918						

### Term of Original/Amended Contract

<b>Date Work Will Begin (i.e., effective date of contract)</b>	06-27-2024	<b>Date Work Will End By (not more than 5 years from start date; for construction contracts, enter planned completion date)</b>	6-30-2025
		<b>New Date of Contract End (If Any)</b>	

### Compensation/Revised Compensation

<b>If New Contract, Total Contract Price (Lump Sum)</b>	\$	<b>If New Contract, Total Contract Price (Not To Exceed)</b>	\$183,810.00
<b>Pay Rate Per Hour (If Hourly)</b>	\$	<b>If Amendment, Change in Price</b>	\$
<b>Other Expenses</b>		<b>Requisition Number</b>	

### Budget Information

*If you are planning to multi-fund a contract using LEP funds, please contact the State and Federal Office before completing requisition.*

Resource #	Funding Source	Org Key	Object Code	Amount
9655/0000	Fund 21, Measure Y	210-9655-0-0000-8500-6289-918-9180-9906-9999-9999	6289	\$183,810.00

### Approval and Routing (in order of approval steps)

Services cannot be provided before the contract is fully approved and a Purchase Order is issued. Signing this document affirms that to your knowledge services were not provided before a PO was issued.

	<b>Division Head</b>	<b>Phone</b>	510-535-7038	<b>Fax</b>	510-535-7082
1.	<b>Executive Director, Facilities Planning and Management</b>				
	<b>Signature</b> <i>[Signature]</i>	<b>Date Approved</b>	6/12/2024		
2.	<b>General Counsel, Department of Facilities Planning and Management</b>				
	<b>Signature</b> <i>[Signature]</i>	<b>Date Approved</b>	6/12/24		
3.	<b>Chief Systems &amp; Services Officer, Facilities Planning and Management</b>				
	<b>Signature</b> <i>[Signature]</i>	<b>Date Approved</b>	6/12/24		
4.	<b>Chief Financial Officer</b>				
	<b>Signature</b>	<b>Date Approved</b>			
5.	<b>President, Board of Education</b>				
	<b>Signature</b>	<b>Date Approved</b>			