

Board Office Use: Legislative File Info.	
File ID Number	15-0027
Introduction Date	2-11-15
Enactment Number	15-071
Enactment Date	2/11/15 OR



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

Memo

To Board of Education
From Antwan Wilson, Superintendent

Board Meeting Date
(To be completed by
Procurement) 2/11/15

Subject Professional Services Contract - St. Mary's College - Lift Up
- State & Federal Programs 950 for St. Jarlath 733 (site/department)

Action Requested Ratification of professional services contract between Oakland Unified School District and St. Mary's College - Lift Up. Services to be primarily provided to State & Federal Programs 950 for St. Jarlath 733 for the period of 12/15/2014 through 06/30/2015.

Background
A one paragraph explanation of why the consultant's services are needed.
OUSD is required by federal law to allow private non-profit schools to participate in the OUSD Title II Part A Program. Schools that choose to participate are provided with "fair and equitable" Title II Part A services after they have complied with program requirements. After consultation with the private school to reach agreement on the type of professional development services to be provided, the OUSD Private Schools Program administers the agreed upon professional development services.

Discussion
One paragraph summary of the scope of work.
Lift Up will provide professional development services for the St. Jarlath School site instructional staff. These trainings will be in alignment with the Common Core Standards using critical thinking strategies and close reading. Lift Up will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve the student academic achievement in curriculum subjects Reading, Social Studies and English.

Recommendation Ratification of professional services contract between Oakland Unified School District and St. Mary's College - Lift Up. Services to be primarily provided to State & Federal Programs 950 for St. Jarlath 733 for the period of 12/15/2014 through 06/30/2015.

Fiscal Impact Funding resource name (please spell out) Title IIA
not to exceed 5,000.00

Attachments

- Professional Services Contract including scope of work
- Fingerprint/Background Check Certification
- Insurance Certification
- TB screening documentation
- Statement of qualifications

Board Office Use: Legislative File Info.	
File ID Number	15-0027
Introduction Date	2-11-15
Enactment Number	15-0171
Enactment Date	2/11/15 OA



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

PROFESSIONAL SERVICES CONTRACT 2014-2015

This Agreement is entered into between St. Mary's College - Lift Up

(CONTRACTOR) and Oakland Unified School District (OUSD). OUSD is authorized by Government Code Section 53060 to contract for the furnishing of special services and advice in financial, economic, accounting, engineering, legal, and administrative matters with persons specially trained, experienced, and competent to perform such services. CONTRACTOR warrants it is specially trained, experienced, and competent to provide such services. The parties agree as follows:

- Services:** CONTRACTOR shall provide the ("Services" or "Work") as described in **Exhibit "A,"** attached hereto and incorporated herein by reference.
- Terms:** CONTRACTOR shall commence work on 12/15/2014, or the day immediately following approval by the Superintendent if the aggregate amount CONTRACTOR has contracted with the District is below \$ 84,100 in the current fiscal year; or, approval by the Board of Education if the total contract(s) exceed \$ 84,100, whichever is later. The work shall be completed no later than 06/30/2015.
- Compensation:** OUSD agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this Agreement. The compensation under this Contract shall not exceed Five Thousand Dollars (5,000.00) [per fiscal year], at an hourly billing rate not to exceed \$ 250.00 per hour. This sum shall be for full performance of this Agreement and includes all fees, costs, and expenses incurred by Contractor including, but not limited to, labor, materials, taxes, profit, overhead, travel, insurance, subcontractor costs, and other costs.

If CONTRACTOR will be compensated hourly for services provided under this Contract, CONTRACTOR shall describe in Exhibit "A," attached hereto, the specific scope of services to be delivered on an hourly basis to OUSD.

OUSD shall not be liable to CONTRACTOR for any costs or expenses paid or incurred by CONTRACTOR in performing services for OUSD, except as follows: _____

Payment for Work shall be made for all undisputed amounts in monthly installment payments within forty-five (45) days after CONTRACTOR submits an invoice to OUSD for Work actually completed and after OUSD's written approval of the Work, or the portion of the Work for which payment is to be made.

The granting of any payment by OUSD, or the receipt thereof by CONTRACTOR, shall in no way lessen the liability of CONTRACTOR to correct unsatisfactory work, although the unsatisfactory character of that work may not have been apparent or detected at the time a payment was made. Work, which does not conform to the requirements of this Agreement, may be rejected by the District and in that case must be replaced by CONTRACTOR without delay.

- Equipment and Materials:** CONTRACTOR shall provide all equipment, materials, and supplies necessary for the performance of this Agreement *except:* _____, which shall not exceed a total cost of _____.

5. CONTRACTOR Qualifications / Performance of Services:

CONTRACTOR Qualifications: CONTRACTOR warrants it is specially trained, experienced, competent and fully licensed to provide the Services required by this Agreement in conformity with the laws and regulations of the State of California, the United States of America, and all local laws, ordinances and/or regulations, as they may apply.

Standard of Care: CONTRACTOR warrants that CONTRACTOR has the qualifications and ability to perform the Services in a professional manner, without the advice, control, or supervision of OUSD. CONTRACTOR's services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of its profession for services to California school districts.

- Invoicing:** Invoices furnished by CONTRACTOR under this Agreement must be in a form acceptable to OUSD. All amounts paid by OUSD shall be subject to audit by OUSD. Invoices shall include, but not be limited to: Contractor name, Contractor address, invoice date, invoice number, purchase order number, name of school or department service was provided to, period of service, name of the person performing the service, date service was rendered, brief description of services provided, number of hours of service, hourly rate, total payment requested.
- Notices:** All notices and invoices provided for under this Agreement shall be in writing and either personally delivered during normal business hours or sent by U.S. Mail (certified, return receipt requested) with postage prepaid to the other party at the address set forth below:

OUSD Representative:

Name: Maria Beltran
Site /Dept.: State & Federal Programs 950 for St. Jarlath 733
Address: 1000 Broadway Suite 450
Oakland, Ca 94607
Phone: 510-879-1027
Email: danielle.patterson@ousd.k12.ca.us

CONTRACTOR:

Name: Mary Dierking
Title: Consultant
Address: 1928 St Marys Rd
Moraga CA 94556
Phone: 925-631-4506
Email: dandmdierking@aol.com

Notice shall be effective when received if personally served or, if mailed, three days after mailing. Either party must give written notice of a change of address.

8. **Status of Contractor:** This is not an employment contract. CONTRACTOR, in the performance of this Agreement, shall be and act as an independent contractor. CONTRACTOR understands and agrees that it and all of its employees shall not be considered officers, employees, agents, partner, or joint venture of OUSD, and are not entitled to benefits of any kind or nature normally provided employees of OUSD and/or to which OUSD's employees are normally entitled, including, but not limited to, State Unemployment Compensation or Worker's Compensation. 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's employees. In the performance of the work herein contemplated, CONTRACTOR is an independent contractor or business entity, with the sole authority for controlling and directing the performance of the details of the work, OUSD being interested only in the results obtained.

9. **Insurance:**

1. Unless specifically waived by OUSD, the following insurance is required:

- i. If CONTRACTOR employs any person to perform work in connection with this Agreement, CONTRACTOR shall procure and maintain at all times during the performance of such work, Workers' Compensation Insurance in conformance with the laws of the State of California and Federal laws when applicable. Employers' Liability Insurance shall not be less than One Million Dollars (\$1,000,000) per accident or disease.

Check one of the boxes below:

CONTRACTOR is aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and will comply with such provisions before commencing the performance of the Work of this Contract.

CONTRACTOR does not employ anyone in the manner subject to the workers' compensation laws of California.

- ii. CONTRACTOR shall maintain Commercial General Liability insurance, including automobile coverage with limits of One Million Dollars (\$1,000,000) per occurrence for bodily injury and property damage. The coverage shall be primary as to OUSD and shall name OUSD as an additional insured. Evidence of insurance must be attached. Endorsement of OUSD as an additional insured shall not affect OUSD's rights to any claim, demand, suit or judgment made, brought or recovered against CONTRACTOR. The policy shall protect CONTRACTOR and OUSD in the same manner as though each were separately issued. Nothing in said policy shall operate to increase the Insurer's liability as set forth in the policy beyond the amount or amounts shown or to which the Insurer would have been liable if only one interest were named as an insured.

- iii. If CONTRACTOR is offering OUSD professional advice under this Contract, CONTRACTOR shall maintain Errors and Omissions insurance or Professional Liability insurance with coverage limits of One Million Dollars (\$1,000,000) per claim.

OR

- iv. CONTRACTOR is not required to maintain any insurance under this agreement. (Completed and approved Waiver of Insurance Form is required from OUSD's Risk Management.) Waiver of insurance does not release CONTRACTOR from responsibility for any claim or demand.

10. **Licenses and Permits:** CONTRACTOR shall obtain and keep in force all licenses, permits, and certificates necessary for the performance of this Agreement.

11. **Assignment:** The obligations of CONTRACTOR under this Agreement shall not be assigned by CONTRACTOR without the express prior written consent of OUSD.

12. **Non-Discrimination:** It is the policy of OUSD that in connection with all work performed under Contracts there be no discrimination because of race, color, ancestry, national origin, religious creed, physical disability, medical condition, marital status, sexual orientation, gender, or age; therefore, CONTRACTOR agrees to comply with applicable Federal and California laws including, but not limited to, the California Fair Employment and Housing Act beginning with Government Code Section 12900 and Labor Code Section 1735 and OUSD policy. In addition, CONTRACTOR agrees to require like compliance by all its subcontractor(s). CONTRACTOR shall not engage in unlawful discrimination in employment on the basis of actual or perceived; race, color, national origin, ancestry, religion, age, marital status, pregnancy, physical or mental disability, medical condition, veteran status, gender, sex or sexual orientation.

13. **Drug-Free / Smoke Free Policy:** No drugs, alcohol, and/or smoking are allowed at any time in any buildings and/or grounds on OUSD property. No students, staff, visitors, CONTRACTORS, or subcontractors are to use controlled substances, alcohol or tobacco on these sites.
 14. **Indemnification:** CONTRACTOR agrees to hold harmless, indemnify, and defend OUSD and its officers, agents, and employees from any and all claims or losses accruing or resulting from injury, damage, or death of any person, firm, or corporation in connection with the performance of this Agreement. CONTRACTOR also agrees to hold harmless, indemnify, and defend OUSD and its elective board, officers, agents, and employees from any and all claims or losses incurred by any supplier, contractor, or subcontractor furnishing work, services, or materials to CONTRACTOR in connection with the performance of this Agreement. This provision survives termination of this Agreement.
 15. **Copyright/Trademark/Patent/Ownership:** CONTRACTOR understands and agrees that all matters produced under this Agreement shall become the property of OUSD and cannot be used without OUSD's express written permission. OUSD shall have all right, title and interest in said matters, including the right to secure and maintain the copyright, trademark, and/or patent of said matter in the name of OUSD. CONTRACTOR consents to use of CONTRACTOR's name in conjunction with the sale, use, performance and distribution of the matters, for any purpose and in any medium. These matters include, without limitation, drawings, plans, specifications, studies, reports, memoranda, computation sheets, the contents of computer diskettes, artwork, copy, posters, billboards, photographs, videotapes, audiotapes, systems designs, software, reports, diagrams, surveys, source codes or any other original works of authorship, or other documents prepared by CONTRACTOR or its Sub-CONTRACTORS in connection with the Services performed under this Agreement. All works shall be works for hire as defined under Title 17 of the United States Code, and all copyrights in those works are the property of OUSD.
 16. **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 or prevent a similar subsequent act from constituting a violation of the Agreement.
 17. **Termination:** OUSD may at any time terminate this Agreement upon 30 days prior written notice to CONTRACTOR. OUSD shall compensate CONTRACTOR for services satisfactorily provided through the date of termination. In addition, OUSD may terminate this Agreement for cause should CONTRACTOR fail to perform any part of this Agreement. In the event of termination for cause, OUSD may secure the required services from another contractor. If the cost to OUSD exceeds the cost of providing the services pursuant to this Agreement, CONTRACTOR shall pay the additional cost.
 18. **Conduct of CONTRACTOR:** By signing this Agreement, CONTRACTOR certifies compliance with the following requirements and will provide OUSD with evidence of staff qualifications, which include:
 1. **Tuberculosis Screening:** CONTRACTOR is required to screen employees who will be working at OUSD sites for more than six hours. CONTRACTOR affirms that each employee has current proof of negative TB testing on file and TB results are monitored.
 2. **Fingerprinting of Employees and Agents.** The fingerprinting and criminal background investigation requirements of Education Code section 45125.1 apply to CONTRACTOR's services under this Agreement and CONTRACTOR certifies its compliance with these provisions as follows: "CONTRACTOR certifies that CONTRACTOR has complied with the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 with respect to all CONTRACTOR's employees, subcontractors, agents, and subcontractors' employees or agents ("Employees") regardless of whether those Employees are paid or unpaid, concurrently employed by OUSD, or acting as independent contractors of CONTRACTOR, who may have contact with OUSD pupils in the course of providing services pursuant to the Agreement, and the California Department of Justice has determined that none of those Employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. Contractor further certifies that it has received and reviewed fingerprint results for each of its Employees and Contractor has requested and reviews subsequent arrest records for all Employees who may come into contract with OUSD pupils in providing services to the District under this Agreement.
- In the event that OUSD, in its sole discretion, at any time during the term of this contract, desires the removal of any CONTRACTOR related persons, employee, representative or agent from an OUSD school site and, or property, CONTRACTOR shall immediately, upon receiving notice from OUSD of such desire, cause the removal of such person or persons.
19. **No Rights in Third Parties:** This Agreement does not create any rights in, or inure to the benefit of, any third party except as expressly provided herein.
 20. **OUSD's Evaluation of CONTRACTOR and CONTRACTOR's Employees and/or Subcontractors.** OUSD may evaluate CONTRACTOR's work in any way that OUSD is entitled to do so pursuant to applicable law. The OUSD's evaluation may include, without limitation:
 1. Requesting that OUSD employee(s) evaluate the CONTRACTOR and the CONTRACTOR's employees and subcontractors and each of their performance.
 2. Announced and unannounced observance of CONTRACTOR, CONTRACTOR's employee(s), and/or subcontractor(s).
 21. **Limitation of OUSD Liability:** Other than as provided in this Agreement, OUSD's financial obligations under this Agreement shall be limited to the payment of the compensation provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event, shall OUSD be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of, or in connection with, this Agreement for the services performed in connection with this Agreement.
 22. **Confidentiality:** CONTRACTOR and all CONTRACTOR's agents, personnel, employee(s), and/or subcontractor(s) shall maintain the confidentiality of all information received in the course of performing the Services. CONTRACTOR understands that student records are confidential and agrees to comply with all state and federal laws concerning the maintenance and disclosure of student records. This requirement to maintain confidentiality shall extend beyond the termination of this Agreement. Contractors will be permitted

access to student data only where permissible under state and federal law and only after executing OUSD's Confidentiality Agreement Regarding Student Data.

23. **Conflict of Interest:** CONTRACTOR shall abide by and be subject to all applicable, regulations, statutes or other laws regarding conflict of interest. CONTRACTOR shall not hire any officer or employee of OUSD to perform any service by this Agreement without the prior approval of OUSD Human Resources.

CONTRACTOR affirms to the best of his/her/its knowledge, there exists no actual or potential conflict of interest between CONTRACTOR's family, business or financial interest and the services provided under this Agreement, and in the event of change in either private interest or services under this Agreement, any question regarding possible conflict of interest which may arise as a result of such change will be brought to OUSD's attention in writing.

Through its execution of this Agreement, CONTRACTOR acknowledges that it is familiar with the provisions of section 1090 *et seq.* and section 87100 *et seq.* of the Government Code of the State of California, and certifies that it does not know of any facts which constitute a violation of said provisions. In the event CONTRACTOR receives any information subsequent to execution of this Agreement which might constitute a violation of said provisions, CONTRACTOR agrees it shall notify OUSD in writing.

24. **Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion:** CONTRACTOR certifies to the best of his/her/its knowledge and belief, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency according to Federal Acquisition Regulation Subpart 9.4, and by signing this contract, certifies that this vendor does not appear on the Excluded Parties List (<https://www.sam.gov/>).

25. **Litigation:** This Agreement shall be performed in Oakland, California and is governed by the laws of the State of California. The Alameda County Superior Court shall have jurisdiction over any state court litigation initiated to enforce or interpret this Agreement.

26. **Incorporation of Recitals and Exhibits:** The Recitals and each exhibit attached hereto are hereby incorporated herein by reference.

27. **Integration/Entire Agreement of Parties:** This Agreement constitutes the entire agreement between the Parties and supersedes all prior discussions, negotiations, and agreements, whether oral or written. This Agreement may be amended or modified only by a written instrument executed by both Parties.

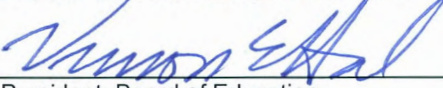
28. **Counterparts:** This Agreement and all amendments and supplements to it may be executed in counterparts, and all counterparts together shall be construed as one document.

29. **Signature Authority:** Each party has the full power and authority to enter into and perform this Agreement, and the person signing this Agreement on behalf of each Party has been given the proper authority and empowered to enter into this Agreement.

30. **Contract Contingent on Governing Board Approval:** OUSD shall not be bound by the terms of this Agreement until it has been formally approved by OUSD's Governing Board, and no payment shall be owed or made to CONTRACTOR absent formal approval. This Agreement shall be deemed to be approved when it has been signed by the Board of Education, and/or the Superintendent as its designee.

31. **W-9 Form:** If CONTRACTOR is doing business with OUSD for the first time, complete and return with the signed Contract the W-9 form.

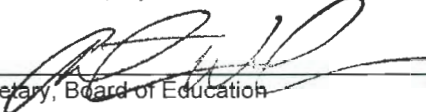
OAKLAND UNIFIED SCHOOL DISTRICT



 President, Board of Education

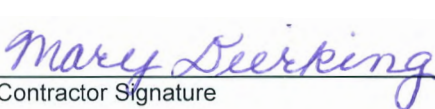
Superintendent

Chief or Deputy Chief



Secretary, Board of Education

CONTRACTOR



Contractor Signature

Mary Dierking

Consultant

Print Name, Title

Form approved by OUSD General Counsel for 2014-15 FY

File ID Number: 15-0027
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By: o.d.

EXHIBIT "A" SCOPE OF WORK

[IF A CONTRACTOR PROVIDES AN ACCEPTABLE DESCRIPTION OF SERVICES AS PART OF A PROPOSAL, THAT DESCRIPTION OF SERVICES MAY BE ATTACHED WITHOUT ANY TERMS, CONDITIONS, LIMITATIONS, ETC., FROM THAT PROPOSAL.]

1. **Description of Services to be Provided:** Provide a description of the service(s) the contractor will provide. Be specific about what service(s) OUSD is purchasing and what *this* Contractor will do.

Please see the attached Scope of Work.

Scope of Work

2014 - 2015

Contractor Name: St. Mary's College – Lift Up Program

School Name: St. Jarlath Elementary School

Lift-Up will provide a maximum of 20 hours of service at the rate of \$250 per hour for a total not to exceed \$5,000.00

Nature of Work:

Lift Up will provide professional development services for the St. Jarlath Elementary School site instructional staff. These trainings will be in alignment with the Common Core Standards using critical thinking strategies and close reading. Lift Up will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve the student academic achievement in curriculum subjects Reading, Social Studies and English.

Program Focal Points:

- Continue and expand the focus on Common Core Standards using critical thinking strategies and close reading
- Differentiated instruction for inclusion students
- Promote writing strategies that integrate Common Core Standards
- Develop and implement brain-based instructional strategies
- Continue and expand strategies for English learners
- Demonstrate and observe implementation of strategies introduced in professional development sessions
- Facilitate principal walk-throughs with Liaison and Coach
- Continue to expand comprehension strategies
- Focus on academic vocabulary strategies
- Provide new websites and technology support for literacy
- Dissemination of coaching model, interventions and assessment results to broader educational community
- Written evaluation report documenting content and process of project and student assessment results

2. **Specific Outcomes:** What are the expected outcomes from the services of this Contract? Be specific. For example, as a result of the service(s): 1) How many more Oakland children are graduating from high school? 2) How many more Oakland children are attending school 95% or more? 3) How many more students have meaningful internships and/or paying jobs? 4) How many more Oakland children have access to, and use, the health services they need? Provide details of program participation (Students will...) and measurable outcomes (Participants will be able to...). NOT THE GOALS OF THE SITE OR DEPARTMENT.

Title II, Part A, Teacher and Principal Training and Recruiting is a federal categorical program. The purpose of Title II, Part A is to increase the academic achievement of all students by helping schools and districts improve teacher and principal quality through professional development and other supporting activities. As a result of receiving Title II Part A Program services, the principal and/or teachers on staff at this specific non-profit private school located in Oakland will improve their understanding and application of specific skills that support the implementation of effective instructional strategies and techniques and/or school administration and leadership. The activities and support provided to the teachers and/or principal will result in an improvement of the instructional program at the school. This improvement in the instructional program will enable students to be more fully engaged and successful in school. Students will have improved school attendance which supports gains in performance in core academic areas and successful ongoing completion of successive grade levels which results in graduation from high school.

3. **Alignment with District Strategic Plan:** Indicate the goals and visions supported by the services of this contract:
(Check all that apply.)

- | | |
|--|--|
| <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 type="checkbox"/> Safe, healthy and supportive schools |
| <input type="checkbox"/> Create equitable opportunities for learning | <input type="checkbox"/> Accountable for quality |
| <input type="checkbox"/> High quality and effective instruction | <input type="checkbox"/> Full service community district |

4. **Alignment with Community School Strategic Site Plan – CSSSP (required if using State or Federal Funds):**

Please select:

- Action Item included in Board Approved CSSSP** (no additional documentation required) – Item Number: _____
- Action Item added as modification to Board Approved CSSSP** – Submit the following documents to the Resource Manager either electronically via email of scanned documents, fax or drop off.
1. Relevant page of CSSSP with action item highlighted. Page must include header with the word “Modified”, modification date, school site name, both principal and school site council chair initials and date.
 2. Meeting announcement for meeting in which the CSSSP modification was approved.
 3. Minutes for meeting in which the CSSSP modification was approved indicating approval of the modification.
 4. Sign-in sheet for meeting in which the CSSSP modification was approved.



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools. Strong students.

OAKLAND UNIFIED SCHOOL DISTRICT

State and Federal Compliance

Private Schools Program

1000 Broadway Ste. #450

Natoya Jefferson

natoya.jefferson@ousd.k12.ca.us

TEL: (510) 879-1037

TITLE II

Program Description 2014- 2015

School Name: Saint Josph Year 2014-2015

The Title II Part A Program provides assistance for preparing, training, recruiting, and retaining high quality teachers. It can also be used to provide leadership development and management training for principals. Teacher and principal professional development should support improved student academic achievement.

Assessment: After concluding our school's WASC certification process it was reported in our goals and findings to:

- Establish a process in which teacher instruction is varied, evolves, and adapts to meet the needs of all students
- Provide training for teachers and administration that will help them utilize instructional methodology to support high achieving students.

Rationale: Focused staff development on research based knowledge about teaching and learning, including the use of technology will ensure that all students learn effectively, regardless of learning styles, individual strengths, or interests.

Objectives:

- Provide ongoing professional development that will provide our newest teachers the pedagogy needed to support student learning in the classroom
- Provide literacy support in the primary grades to establish a solid foundation for future learning in all content areas.
- Incorporating a management framework to help students develop the daily habits of reading, writing, and working independently that will lead to a lifetime of literacy independence.
- Attend a conference that will provide a variety of opportunities to learn strategies that will help the school successfully shift instructional practices to a more student-centered approach that engages higher order thinking skills.

Action Steps:

- Provide teachers seeking advance certification or credentialing funds to go toward high quality professional teacher enhancement programs that are designed to improve teaching and learning
- Primary Faculty will participate in St. Mary's co-sponsored LIF: UP Literacy Professional Development**
- Faculty will attend three Diocesan Staff Days focused on Curriculum Mapping and Assessment
- Teacher will take courses at Concordia University to further his understanding of pedagogy and educational leadership.

Evaluation:

- Literacy Assessments - Improved Reading Fluency and Comprehension in Primary Grades

SAM Search Results
List of records matching your search for :

Search Term : Ann* Aileen* Thomas*
Record Status: Active

No Search Results

SAM Search Results
List of records matching your search for :

Search Term : Mary* Dierking*
Record Status: Active

No Search Results

SAM Search Results
List of records matching your search for :

Search Term : Anne* Marie* Levy*
Record Status: Active

No Search Results

SAM Search Results
List of records matching your search for :

Search Term : Susan* Clemo*
Record Status: Active

No Search Results

SAM Search Results
List of records matching your search for :

Search Term : Nancy* Baum*
Record Status: Active

No Search Results

SAM Search Results
List of records matching your search for :

Search Term : St.* "Mary's"College*
Record Status: Active

ENTITY	EDUCATION, MARYLAND DEPARTMENT OF	Status:Active
DUNS: 108847257	+4:	CAGE Code: 1KY89 DoDAAC:
Expiration Date: Sep 4, 2015	Has Active Exclusion?: No	Delinquent Federal Debt?: No
Address: 18952 E FISHER RD		
City: SAINT MARYS CITY	State/Province: MARYLAND	
ZIP Code: 20686-3002	Country: UNITED STATES	
ENTITY	MOUNT ST MARY'S COLLEGE	Status:Active
DUNS: 069927150	+4:	CAGE Code: 0V1D4 DoDAAC:
Expiration Date: Nov 3, 2015	Has Active Exclusion?: No	Delinquent Federal Debt?: No
Address: 12001 CHALON RD		
City: LOS ANGELES	State/Province: CALIFORNIA	
ZIP Code: 90049-1526	Country: UNITED STATES	

Saint Mary's College of California
P.O. Box 4350, Moraga, CA 94575-4350
tel. 925.631.4700 fax 925.376.8379
www.stmarys-ca.edu/soe



**KALMANOVITZ
SCHOOL OF
EDUCATION**

September 2, 2014

Danielle Patterson, Compliance Technician
Special Programs Division
State and Federal Compliance
Oakland Unified School District

Dear Danielle Patterson,
Please accept this letter of verification that the following instructors will be serving as Literacy Coaches for the Oakland Diocese in the LIFT UP Program:

- Mary Dierking
- Nancy Baum
- Susan Clemo
- Anne Marie Levy
- Ann Thomas

They have passed (negative reading) the tuberculosis test and have successfully cleared the criminal history review process. Please contact me if you have any further questions or require additional information.

Sincerely,

A handwritten signature in black ink that reads "Dr. Kathy Perez".

Dr. Kathy Perez
Director of Outreach and Recruitment
Director of Teaching Leadership
Saint Mary's College of California
Kalmanovitz School of Education
Email: kperez@stmarys-ca.edu
Office: 925.631.4506 | Mobile: 510.593.0473



**KALMANOVITZ
SCHOOL OF
EDUCATION**



BIOGRAPHY

The Literacy Innovations for Teachers Urban Partnership (LIFT UP!) project began in 2010, with Oakland Diocese schools. LIFT UP! is a literacy coaching collaboration between Saint Mary's College of California and the Diocese of Oakland. During its first year the focus was on three schools, Saint Anthony Elementary, Saint Elizabeth's Elementary, and Saint Martin de Porres Elementary. In the second and third years Saint Jarlath Elementary was added. The goal of the program is to have all primary grade students (Kindergarten through third grade) acquire the necessary literacy skills to become effective learners.

To achieve this goal, all primary grade teachers in the four schools were involved in monthly staff development sessions and weekly literacy coaching sessions from the literacy coaches. They were trained in successful research based literacy instruction strategies and effective assessment strategies. Some of these strategies included: a variety of literacy assessments, shared reading, interactive reading, read alouds, morning message, word wall creation, spelling strategies, phonemic awareness strategies, making words, comprehension activities, critical thinking, vocabulary development, shared writing, ELL strategies and interactive writing. The teachers were observed by coaches and held follow-up conferences to reflect on their teaching and discussion of areas for improvement. Student process was monitored by assessments and the data was analyzed to ensure literacy growth.

The teachers were provided with staff development and support in formative assessments for early literacy skills based upon California State Standards and Common Core Standards for grades K-3. The assessments were modeled and teachers were strongly supported with implementation of the assessments as well as strategies to develop these skills for students below proficiency. The assessments were administered at the beginning of the academic and at the end to determine student mastery. These assessments were made available to the next year's teacher as a baseline for their future instruction.

Materials for strategy instruction were provided to all participating teachers including resources to strengthen the use of their technology with suggested researched "apps". Leveled books for each classroom have been provided during the past three years to support guided reading and encourage family reading at home.

Mary Alice Dierking

5 Nottingham Court

Alameda, CA 94502

(510) 856-2112

Education

- Masters in Reading, St. Mary's College
- B.A. Geography, San Francisco State University

Credentials

- Reading Credential, St. Mary's College
- Standard Elementary (California-Fisher, Life)

Additional Professional Training

- Step Up to Writing Trainer
- Mentoring Matters Facilitator
- Six Traits Facilitator
- Literacy Coach for Houghton-Mifflin
- BTSA Facilitator Training
- BTSA Mentor Teacher Training
- State CSET Evaluator
- State CLAD Evaluator
- State Rica Evaluator
- State Reading Grant Evaluator
- Santa Clara County—Goals 2000 Facilitator Training for Grades 4-8
- First Grade Four Block Presenter
- ELIC Facilitator Training and Early Childhood
- Fred Jones Positive Classroom Discipline
- Program Quality Review
- Total Quality Learning (Langford Approaches to System Management)

Teaching Experience

- Instructor at St. Mary's College
- LIFT UP Consultant for the Oakland Dioceses for past 3 years
- Literacy Consultant Private Practice
- Program Specialist for K-8 Literacy AUSD
- Teacher In Charge for Longfellow Elementary School AUSD
- Saint Mary's College Instructor for Master Degree in Teaching Leadership
- Saint Mary's College Research Advisor the Master Degree Graduate Students
- Alliant University Instructor for course EDU 6012 Applied Linguistics Seminar
- Saint Mary's College Instructor for BTSA Practicum 610 and 710
- Saint Mary's College Instructor for course ED 325 and 326 Literacy Clinic
- Literacy Coach for Longfellow School
- Literacy Coach K-6 for AUSD
- District Reading Program Coordinator
- Media Center Teacher and Librarian
- Grades K-8 AUSD

Professional Development Workshops Given

- Development of K-5 Writing Assessment for AUSD
- Comprehension Staff Development
- Writing Staff Development—Writers' Workshop

- Vocabulary Staff Development—community members and high students—work in classrooms and city libraries
- Running Records Staff Development
- Assessment Staff Development for Reading and Writing K-5
- Reciprocal Teaching Staff Development
- 6 Traits Workshops for AUSD
- Pre-school Parent Literacy Training
- Reading Standards Staff Development K-5
- Writing Standards Staff Development K-5
- Parent Literacy Classes
- First Grade Four Blocks, Literacy Program for the entire Alameda Unified School District
- Assessment Training in Literacy for the entire Alameda Unified School District
- Reading Professional Development Workshops—K-8 teachers and administrators
- ELIC Courses each having 30 teachers
- Kindergarten Teachers Balanced Literacy Program for the entire Alameda Unified School District
- Training High School Students for cross age tutoring
- Training Middle School Students for cross age tutoring
- Technology Use
- Positive Discipline
- Developed and Trained volunteers for a special reading program (I Can READ)

Other Professional Experiences

- Faculty of Saint Mary's College
- Advisor Board for Reading Project, Saint Mary's College
District Committees and Responsibilities
- Lum and Longfellow Schools' Leadership Team
- District Educational Technology Committee
- School Site Council—for three different schools
- Student Study Team
- Master Teacher—Trained and worked with 12 different students teachers and two literacy coaches
- District Houghton Mifflin Literacy Coach
- District Reading Task Force Committee Grades k-8 Facilitator
- District Language Arts Curriculum Committee
- District Social Studies Curriculum Committee
- District Math Curriculum Committee
- Mentor Teacher Selection Committee
- District Writing Committee

Professional Organizations

- Delta Kappa Gamma
- International Reading Association
- California Reading Association
- California Teachers Association
- Alameda Education Foundation
- Contra Costa Reading Association
- Alameda County Reading Association

Awards

- Volunteer Award—Alameda Education Foundation, 1996-97 and 2005-06
- Outstanding Student in Reading and Language Arts Leadership—Saint Mary's College, School of Education, 2003
- Nominated for California Teacher of the Year, 1998
- Teacher Recognition—Alameda Unified School District, 1998
- Employee of the Year—Lum Elementary, presented by Alameda Education Foundation

Anne Marie Levy

510.851.5245
1832 Clinton Ave., Alameda, CA 94501

annemlevy@gmail.com

Professional Profile Dedicated to enthusiastic and dynamic teaching to inspire 21st century learners. Determined to support students as they develop a deep understanding of subject matter and the skills they need to apply their knowledge. Focused on strengthening schools by sharing best practices and research based techniques with colleagues.

- Dedicated
- Organized
- Hard working
- Detail Oriented
- Strong Communication Skills
- Resourceful
- Technology Focused
- Team Oriented

Experience *Full-time Teacher, First and Third Grade*

2004-2012 **Donald D. Lum Elementary** **Alameda, CA**

2000-2004 **Longfellow Elementary** **Alameda, CA**

- Member of School Site Council and Leadership Committee championing good quality, engaging instruction
- Conducted parent literacy night sessions to help parents assist students at home
- Mentored 3 student teachers
- Used Qualitative Reading Inventory to assess students 1-on-1 to develop reading goals and accompanying lessons to teach reading strategies
- Created after-school homework club to help students review key concepts
- Conducted K-2 language arts professional development sessions
- Analyzed student test scores to develop school-wide academic goals and incorporated these goals into School Improvement Plans
- Collaborated with K-5 instructors on district Writing Task Force including piloting the Step-Up to Writing program and creating instructional plans
- Spearheaded before-school literacy program and our school's first Response to Intervention sessions to help all students connect to challenging literature
- Advised 3rd -5th graders as Student Council Leader by initiating service projects and leadership activities
- Co-authored school-wide discipline policy and accompanying parent handbook to equip our school with consistent expectations and a safe learning environment
- Established after-school knitting enrichment classes

Practicum Advisor, New Teacher Induction Program

2005-2006 **St. Mary's College** **Moraga, CA**

- Mentored beginning teachers by providing support and encouragement during learning community sessions
- Assessed beginning teacher assignments providing timely and instructive feedback to help inform and enrich their teaching practices

Resource Specialist, Kindergarten through Fourth Grade

1999-2000 **Ocean View Elementary** **Albany, CA**

- Provided individual and small group specialized instruction for students with a variety of learning disabilities
- Planned and coordinated with regular education teachers and specialists to ensure classroom success for special education students
- Designed and implemented students' Individual Education Plans
- Coordinated meetings and other means of communication with parents to encourage a successful partnership between school and home

Full-time teacher, First Grade Teacher

1997-1999 **Barcelona Elementary** **Albuquerque, NM**

1996-1997 **St. Charles Elementary** **Albuquerque, NM**

- Delivered instruction to bilingual students using appropriate ELL techniques
- Planned and implemented all-school programs including elementary science fair and Earth Day educational celebration
- Participated in school-wide committees including chair of the Science Curriculum Adoption Committee for 2000

Education *Bachelor of Arts – Elementary Education and English*

Kindergarten Endorsement

1991-1993 **University of Minnesota** **Duluth, MN**

1993-1995 **College of St. Catherine** **St. Paul, MN**

Masters of Arts – Educational Technology

2005-2007 **California State, East Bay** **Hayward, CA**

Post Graduate MERIT (Making Education Relevant and Interactive Through Technology) Program

Training IISME (Industry Initiatives for Science and Math Education) Fellowships

Step-Up to Writing Trainer

BTSA program

Houghton Mifflin CORE

ACCLAIM Summer Institutes

CLAD Certification

Intel Teach to the Future professional development

Awards Educator of the Year – Longfellow Elementary, Alameda, CA 2004

Ann Thomas

424 Donald Drive, Moraga, CA 94556
Home: (925) 376-7184 Cell: (510) 316-0974
Email: annaileen@mac.com

Education

Saint Mary's College, Moraga, CA

- Reading Leadership Program, Reading Certificate, July 2013
- Multiple Subject Professional Clear Credential, December 1995

California State University, Chico

- Bachelor of Science, Recreation Administration, December 1991

Additional California Certifications

- CLAD Certificate

Teaching Experience

Reading Teacher (2013) Amelia Earhart Elementary: Alameda, CA

- Facilitated 2nd and 1st grade "Soaring to Excellence," literature discussion groups.
- Implemented *Junior Great Books* program, promoting thoughtful literature discussion through shared inquiry.
- Developed children's reading comprehension, critical thinking, writing, speaking and listening skills through shared discussion and extension activities.

Literacy Clinic Tutor (2012 – 2013) Paden Elementary School: Alameda, CA

- Assessed, analyzed and formulated individualized instruction to support struggling readers in an after-school, one-on-one tutoring program.
- Enhanced student's reading comprehension, word identification, word recognition and word analysis skills by creating and conducting individualized guided reading lessons.
- Provided immediate feedback strategies and adjusted instruction based upon student's progress.

Reading Intervention Tutor (2010 – 2012) Sequoia Elementary: Oakland, CA

- Assessed, monitored and provided one-on-one reading intervention lessons for 1st grade students identified as reading below grade-level benchmarks by their classroom teacher.
- Adjusted instruction based upon student needs through the use of both ongoing formal and informal assessments.
- Closely collaborated and communicated with classroom teacher.

First Grade Language Arts Teacher (2000 – 2002)

Bailey's Elementary Magnet School for the Arts and Sciences: Falls Church, VA

- Provided a balanced approach to reading instruction which included phonemic awareness, phonics, fluency, vocabulary and comprehension.
- Developed children's writing through both direct instruction and writer's workshop with emphasis on the four genres of narrative, informational, response to literature and procedural writing.
- Utilized multiple teaching methods to reach my diverse learners in a school that is one of the most culturally, economically and linguistically diverse public elementary schools in Fairfax County.

Elementary Teacher (1996-2000)

First Grade & Kindergarten Piedmont Unified School District: Piedmont, CA (1998-2000)

First & Fifth Grade Los Altos School District: Los Altos, CA (1995-1998)

- Participated in Los Altos School District's six week summer intensive training in the *Slingerland Multisensory Structured Language Approach (MSLA)*.
- Led committee for the implementation of the *LIFESKILLS* program school-wide at Almond Elementary School and trained new teachers in classroom implementation.
- Received training in the *LiPS Lindamood-Bell* program, piloted it for Havens School kindergarten program, and provided feedback and analysis for the adoption committee.

Volunteer Leadership

Troop Leader (2012 – present) Girl Scouts Junior Troop 30288

Summer Reading Program Coordinator (2009 – 2012) Rheem Elementary School, Moraga, CA

Children's Service Projects Program Chair (2009 – 2011) Moraga Juniors Women's Club, Moraga, CA

Susan Clemo
3479 Brookdale Blvd.
Castro Valley, CA 94546
Home 510.886.5024 Cell 510.432.4388
sclemo8148@gmail.com

- HIGHLIGHTS OF QUALIFICATIONS -

- Strong commitment to the education of our children and future teachers
- Self-motivated, reflective, innovative and committed to life-long learning
- Effective and knowledgeable in working with school reform and inquiry
- Excellent facilitation and presentation skills
- Strong sense of responsibility as a professional team worker and learning community member
- Persistent and committed to training effective teachers

- PROFESSIONAL EXPERIENCE -

Adult Teaching Experience

- Instructor, Saint Mary's College- Reading Instruction
- Instructor, Project Pipeline, an alternative credentialing program- Reading Instruction, Language Acquisition
- Instructor at Saint Mary's Saturday Seminar (Beginning Teacher Support Provider)
- Facilitator for Learning Communities (for students working on their masters at Saint Mary's College)
- Advisor and Chair for students writing Master's Thesis, Saint Mary's College
- Supervisor for Student Teachers, Saint Mary's College
- Chair of School/University Partnership Governing Board, CSUH
- Mentor Teacher/Instructional Leader/Staff Developer for Castro Valley USD
- Staff Developer for neighboring districts (Hayward, Pleasanton, Dublin, Moraga)

Other contributions to the Teaching Profession

- Beginning Teacher Support Provider (BTSA)
- Peer Assistance Review Joint Committee, CVUSD
- Primary author of a successful 2002 Distinguished Elementary School Application for CVE
- Program Quality Review consultant
- Active member of School Site Council, Parent Teacher Club, Language Arts District Committee, and School-Site Literacy Team.
- Summer school principal for three summers
- Coordinator of Castro Valley Elementary Family Learning Nights
- Pilot Teacher for state textbook adoptions in science, math and language arts

Effective Teaching Methods for Adult Learning

- Well versed in the adult learning theory
- Approach classroom teaching as a facilitator of student learning by
 - establishing clear goals/objectives for each lesson based on state and district standards;
 - good understanding of adult learning stages of adults and ability to scaffold their knowledge
 - being aware of learner's reactions to material presented and checking for understanding;
 - emphasizing development of students' critical thinking skills and creativity;
 - creating a balance between teaching goals and the students' learning needs, assuring a supportive learning environment; and
 - using a variety of instructional techniques appropriate to the diverse learning styles of the students
- Collaborate regularly with colleagues to ensure an equitable and complementary educational program
- Routinely use an inquiry method to analyze data and adjust instruction appropriately

Classroom Teaching

- Taught for thirty-nine years in Castro Valley USD (Grades K-8)

- Successfully developed and implemented curriculum designed to meet the needs of all learners including combination and limited English proficient classrooms
- Created and Implemented successful interventions for at risk learners
- Persistent in actively and creatively involving parents and guardians in the educational process

- EMPLOYMENT HISTORY -

2003-2013 Instructor, Saint Mary's College- Fundamentals of Reading Instruction, Philosophy and Theories of Education.

2001-2011 Instructor, Project Pipeline, an alternative credentialing program- Fundamentals of Reading Instruction and Language Acquisition

2005-2011 Chair and/or Reader for Saint Mary's College Master's Students

2001-2002 BASRC Castro Valley Unified School District Reform Coordinator (Bay Area School Reform Collaborative)

2000-2001 BASRC Castro Valley Elementary School Reform Coordinator

1980-2010 4th, 5th, 1st, pre-first, K, Castro Valley Elementary School - CVUSD

1985-1987 Summer School Principal, Castro Valley USD

1971-1980 K, 1st, 2nd, 3rd, 4th, and 8th Grade Teacher

- EDUCATION & TRAINING -

M.S., Education, - Educational Leadership, 2003 - St. Mary's College, Moraga, Ca
 Preliminary Administrative Certificate, California State University, Hayward, 1985
 Multiple Subject Credential with emphasis on Social Science, 1971 California State University, Hayward
 B.A. Elementary Education, 1971 - Bradley University, Peoria, Ill.

- HONORS -

Primary author of a successful California Distinguished School application, 2002
 Recipient, Outstanding Educator, Center for Educational Leadership,
 School of Education and Allied Studies, CSUH, 2000
 CVUSD Teacher of the Year, 1995
 Alameda County Teacher of the Year, 1995
 The Larry J. Goodman Educational Service Award, 1989-90

Nancy G. Baum
2710 Harland Court
Walnut Creek, California 94598
(925) 932-2273 (H); (925) 595-5054 (C)
nancygbaum@gmail.com

Objective: Teaching/Advising position at a college allowing me to support pre-service educators

Employment History

Administrative

July 2013-Present

Program Director

Super Stars Literacy
Oakland, California

- Led program strategy and design, including training program
- Developed and presented weekly training (literacy, special education, assessment, working with English language learners, other topics)
- Directed Program Managers in the supervision of 28 AmeriCorps members (teachers)

Aug 2008-June 2012

Elementary School Principal

Mt. Diablo Unified School District

- Coached site staff of 49 certificated and classified staff in curriculum development and delivery (language arts, mathematics)
- Developed and presented professional development (professional learning communities, special education, English language learners, other topics)
- Evaluated general education/special education teachers, classified staff

Jan 2007-June 2008

Nov 2000-June 2004

Elementary School Vice Principal

Walnut Acres Elementary (2007-2008), Parkside Elementary (2000-2004)
Mt. Diablo Unified School District, Pittsburg Unified School District

- Coached/evaluated general education/special education teachers, classified staff
- Coordinated \$95,000 literacy grant, including coaching support for K-5 teachers

Jan 1999-Oct 2000

Community Services Coordinator

Walnut Acres Elementary
Mt. Diablo Unified School District

- Coordinated outreach between elementary school and community partners, including university student teaching programs

Jan 1989-July 1990

Assistant Director, Staff Development

West Contra Costa Unified School District

- Developed/implemented district-wide professional development programs aligned with district mission, vision

Oct 1983-Dec 1988

Program Specialist, Special Education

West Contra Costa Unified School District

- Coordinated special education classes at over 20 district schools
- Created and delivered presentations on best practices in special education pedagogy at state, national conferences
- Supported principals in the coaching, supervision and evaluation of site special education staff

Teaching

Sept 2004-Jan 2007

Reading Support Teacher

Walnut Acres Elementary
Mt. Diablo Unified School District

- Designed/implemented reading intervention program for kindergarten-fifth grade students
- Hired/supervised literacy assistant
- Coached classroom teachers in literacy best practices

Sept 1991-June 1993

General Education Teacher

Castro Elementary
West Contra Costa Unified School District

- Taught full-inclusion fifth grade class
- Coached/supervised student teachers in general education/special education pedagogy, curriculum
- Presented workshops on full inclusion of special education students to schools, community groups

Oct 1990-Aug 1996

Instructor (Elementary/Special Education, MEd Programs)

St. Mary's College, Moraga

- Taught Mainstreaming, Student Teaching Seminars, Research Seminars
- Supervised student teachers
- Coached/supported BTSA teachers

June 1981-Oct 1983

Special Education Teacher

Mira Vista Elementary, Bayview Elementary
West Contra Costa Unified School District

- Taught autism classes on general education campuses
- Developed and implemented successful model for social inclusion of autistic students into general education activities
- Created and presented Project CARE (disability awareness program) to over 35 school/community organizations

Education

- 2006 Cross-cultural, Language and Academic Development Certificate
University of San Diego
- 1990 Administrative Services Credential
Hayward State University
- 1981 Special Education Credential
San Francisco State University
- 1981 MA Degree in Education
San Francisco State University
- 1979 Multiple Subjects Credential
San Francisco State University
- 1979 BA degree in Liberal Arts (Emphasis English), Magna Cum Laude
San Francisco State University

PR: R0152669 ... PO: ... Status: Sec Cd: 9500 Aprv: Next:

Vendor	RemitTo	ShipTo	BillTo	Reqst'd	Aprv'd	Printed	Details	Dates	Blanket	Req. Codes	Mis
V053933 ...	Addr: P1			By: Patterson, Danie							
ST MARY'S COLLEGE OF CALIFORNIA				Date: 12/08/2014							
375 RHEEM BLVD				PO Total: \$5,000.00							
FREMONT	CA	94556									

Req Codes

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EC <input type="text"/>

Item Numl	Quantity	Units	Description	Amount	ACCOUNT NUMBER	Extended Ar
0001	1	EA	Ratification of professiona	5,000.00	GL 7334851204-5825	5,00
0002	0			0.00	GL -	

Purchase Document

USER
 PATTERSD
 TBA

Attachments

ACORD™ CERTIFICATE OF LIABILITY INSURANCE

Date (MM/DD/YR)
12/2/14

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 be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).


PRODUCER Heffernan Insurance Brokers 1350 Carlback Avenue Walnut Creek, CA 94596 CA License #0564249	CONTACT NAME: Shelaine Gonsalves
	PHONE (A/C, No, Ext): 925-934-8500 FAX (A/C, No): 925-934-8278 EMAIL ADDRESS: ShelaineG@heffins.com
INSURED Saint Mary's College of California P.O. Box 3554 Moraga CA 94575	INSURERS AFFORDING COVERAGE NAIC #
	INSURER A: Philadelphia Indemnity
	INSURER B: United Educators
	INSURER C: Travelers Property Casualty of America
	INSURER D:
	INSURER E:

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

THIS IS TO CERTIFY THAT 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 INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	GENERAL L LIABILITY	X		PHPK1209956	08/01/14	08/01/15	EACH OCCURRENCE	\$1,000,000
	X COMMERCIAL GENERAL LIABILITY						DAMAGE TO RENTED PREMISES (Ea. occurrence)	\$300,000
	CLAIMS-MADE <input type="checkbox"/> OCCUR						MED EXP (Any one person)	\$15,000
	X PROFESSIONAL LIABILITY						PERSONAL & ADV INJURY	\$1,000,000
GEN'L. AGGREGATE LIMIT APPLIES PER				PHPK1209956 AGG \$1,000,000	08/01/14	08/01/15	GENERAL AGGREGATE	\$2,000,000
X POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC	PRODUCTS - COMP/OP AGG	\$2,000,000						
	EMPLOYEE BENEFITS	\$1,000,000						
A	AUTOMOBILE LIABILITY			PHPK1209956	08/01/14	08/01/15	COMBINED SINGLE LIMIT (Ea accident)	\$1,000,000
	X ANY AUTO						BODILY INJURY (Per person)	\$
	X ALL OWNED AUTOS						BODILY INJURY (Per accident)	\$
	X HIRED AUTOS						PROPERTY DAMAGE (Per accident)	\$
	X SCHEDULED AUTOS	DEDUCTIBLE: COMP/COLL	\$1,000					
	X NON-OWNED AUTOS							
	X ACV Sched. AUTOS							
B	X UMBRELLA LIAB			GLX201400369700	08/01/14	08/01/15	EACH OCCURRENCE	\$25,000,000
	EXCESS LIAB						AGGREGATE	\$25,000,000
	DED <input checked="" type="checkbox"/> RETENTION \$1,000,000							\$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	Y/N	N/A	TC2JUB419J680314	07/01/14	07/01/15	X WC STATUTORY LIMITS	OTHER
	ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER/MEMBER EXCLUDED? (Mandatory in N.H.)						E.L. EACH ACCIDENT	\$1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	\$1,000,000
							E.L. DISEASE - POLICY LIMIT	\$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
 Re: As Per Contract or Agreement on File with Insured.
 Oakland Unified school District and their officers, agents and employees, Mary A. Dierking, Susan Clemo, Ann Marie Levy, Nancy G. Baum and Ann Aileen Thomas are named as additional insured on General Liability policy per attached endorsement.

CERTIFICATE HOLDER Oakland Unified school District and their officers, agents and employees 900 High Street Oakland, CA 94606	CANCELLATION 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 

PROFESSIONAL SERVICES CONTRACT ROUTING FORM 2014-2015



Basic Directions

Additional directions and related documents are in the Knowledge Center on the Intranet and Contracts Online 2.0 Tool

Services cannot be provided until the contract is fully approved and a Purchase Order has been issued.

- Contractor and OUSD contract originator (principal or manager) reach agreement about scope of work and compensation.
- Ensure contractor meets the consultant requirements (including the Excluded Party List, Insurance and HRSS Consultant Verification)
- Contractor and OUSD contract originator complete the contract packet together and attach required attachments.
- Within 2 weeks of creating the requisition the OUSD contract originator submits **complete** contract packet for approval to Procurement.

Attachment Checklist	<input type="checkbox"/> For All Consultants: Authorization to Work, which indicates vendor has cleared the registration and background check <input type="checkbox"/> For All Consultants: Results page of the Excluded Party List (https://www.sam.gov/) <input type="checkbox"/> For All Consultants: Statement of qualifications (organization); or resume (individual consultant).
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OUSD Staff Contact Emails about this contract should be sent to: (required) danielle.patterson@ousd.k12.ca.us

Contractor Information

Contractor Name	St. Mary's College - Lift Up	Agency's Contact	Mary Dierking				
OUSD Vendor ID #	V053933	Title	Consultant				
Street Address	1928 St Marys Rd	City	Moraga	State	CA	Zip	94556
Telephone	925-631-4506	Email (required)	dandmdierking@aol.com				
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				

Compensation and Terms – Must be within the OUSD Billing Guidelines

Anticipated start date	12/15/2014	Date work will end	06/30/2015	Other Expenses	
Pay Rate Per Hour (required)	\$ 250.00	Number of Hours (required)	20		

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 #	Resource Name	Org Key	Object Code	Amount
4035	Title IIA	7334851204	5825	\$ 5,000.00
			5825	
			5825	
Requisition No. (required)	R0152669		Total Contract Amount	\$ 5,000.00

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.

OUSD Administrator verifies that this vendor does not appear on the Excluded Parties List (<https://www.sam.gov/>)

1.	Administrator / Manager (Originator)	Name	Maria Beltran	Phone	510-879-1027	
	Site/Department (Name & #)	State & Federal Programs 950 for St. Jarlath 733			Fax	
	Signature	<i>Maria Beltran</i>			Date Approved	12/18/2014
2.	Resource Manager , if using funds managed by:	<input checked="" type="checkbox"/> State and Federal <input type="checkbox"/> Quality, Community, School Development <input type="checkbox"/> Family, Schools, and Community Partnerships <input type="checkbox"/> Risk				
	<input type="checkbox"/> Scope of work indicates compliant use of restricted resource and is in alignment with school site plan (CSSSP)					
	Signature	<i>Susan Kang</i>			Date Approved	12/19/14
3.	Network Superintendent/Deputy Network Superintendent					
	Signature				Date Approved	
4.	Chiefs / Deputy Chiefs	Consultant Aggregate <input type="checkbox"/> Under <input type="checkbox"/> Over \$84,100 <input type="checkbox"/> Services described in the scope of work align with needs of department or school site <input type="checkbox"/> Consultant is qualified to provide services described in the scope of work				
	Signature	<i>[Signature]</i>			Date Approved	12/22/2014
	5. Superintendent, Board of Education Signature on the legal contract					
Legal	Required if not using standard contract	Approved		Denied - Reason		
Procurement	Date Received			PO Number	P1504655	