

Board Office Use: Legislative File Info.	
File ID Number	20-1109
Introduction Date	6-10-2020
Enactment Number	20-0925
Enactment Date	6/10/2020 lf



**OAKLAND UNIFIED  
SCHOOL DISTRICT**

*Community Schools, Thriving Students*

# Memo

**To** Board of Education

**From** Kyla Johnson-Trammell, Superintendent  
Tadashi Nakadegawa, Interim Deputy Chief, Facilities Planning and Management

**Board Meeting Date** June 10, 2020

**Subject** Amendment No. 1, Independent Consultant Agreement for Professional Services - School Facility Consultants - Facilities Planning & Management Project - Division of Facilities Planning and Management

**Action Requested** Approval by the Board of Education of Amendment No.1, Independent Consultant Agreement for Professional Services between the District and School Facility Consultants, Sacramento, CA, for the latter to assist the District in maximizing the building program by pursuing both State and Federal funds. Maximizing funding opportunities and actively pursuing funding applications on behalf of the District utilizing a variety of School Facility Programs, as well as updating and generating additional modernization and new construction eligibility, for the Facilities Planning & Management Project, in an additional amount of \$190,000.00 increasing Agreement not to exceed amount from \$190,000.00 to \$380,000.00, authorizing the President and Secretary of the Board to sign the Amendment for same with said Consultant with the time extension schedule to last until June 30, 2021, pursuant to the Amendment.

**Discussion** This Amendment is for additional Project Management Services for the District and a time extension of 365 days.

**LBP** (Local business participation percentage) 0.00%

**Recommendation** Approval by the Board of Education of Amendment No.1, Independent Consultant Agreement for Professional Services between the District and School Facility Consultants, Sacramento, CA, for the latter to assist the District in maximizing the building program by pursuing both State and Federal funds. Maximizing funding opportunities and actively pursuing funding applications on behalf of the District utilizing a variety of School Facility Programs, as well as updating and generating additional modernization and new construction eligibility, for the Facilities Planning & Management Project, in an additional amount of \$190,000.00 increasing Agreement not to exceed amount from \$190,000.00 to \$380,000.00, authorizing the President and Secretary of the Board to sign the Amendment for same with said Consultant with the time extension schedule to last until June 30, 2021, pursuant to the Amendment.

**Fiscal Impact** Fund 21, Measure J

**Attachments**

- Amendment No. 1
- Scope of work
- Insurance Certificate

## AMENDMENT NO. 1

### INDEPENDENT CONSULTANT AGREEMENT

This Amendment is entered into between the Oakland Unified School District (OUSD) and **School Facility Consultants**. OUSD entered into an agreement with CONTRACTOR for services on **June 26, 2019** ("Agreement"), and the parties agree to amend the Agreement for the Services with **Facilities Planning & Management Project** as follows and as set forth in Exhibit A:

1.	<b>Services:</b>	<input type="checkbox"/> The scope of work is <u>unchanged</u> .	<input checked="" type="checkbox"/> The scope of work has <u>changed</u> .
<p><b>If scope of work changed:</b> 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.</p> <p>The CONTRACTOR agrees to provide the following amended services: Continue to provide and assist the District with on an ongoing basis to determine and acquire State funding eligibility for new school construction, the modernization of existing school facilities and joint-use projects under the School Facility Program, assist the District with the preparation and submittal of California Department of Education and State Allocation Board applications, as described in proposal dated April 27, 2020 attached to this Amendment.</p>			
2.	<b>Terms (duration):</b>	<input type="checkbox"/> The term of the contract is <u>unchanged</u> .	<input checked="" type="checkbox"/> The term of the contract has <u>changed</u> .
<p><b>If term is changed:</b> The contract term is extended by an additional <b><u>Three Hundred Sixty-five days (365)</u></b>, and the amended expiration date is <b><u>June 30, 2021</u></b>.</p>			
3.	<b>Compensation:</b>	<input type="checkbox"/> The contract price is <u>unchanged</u> .	<input checked="" type="checkbox"/> The contract price has <u>changed</u> .
<p><b>If the compensation is changed:</b> The not to exceed contract price is</p> <p style="margin-left: 40px;"><input checked="" type="checkbox"/> Increased by: <b><u>One Hundred Ninety Thousand dollars No/100 (\$190,000.00)</u></b>.</p> <p style="margin-left: 40px;"><input type="checkbox"/> Decreased by _____ dollars and no/100 (\$_____).</p> <p>Prior to this amendment, the not to exceed contract price was <b><u>One Hundred Ninety Thousand, dollars No/100(\$190,000.00)</u></b>, and after this amendment, the not to exceed contract price will be: <b><u>Three Hundred Eighty Thousand dollars No/100 (\$380,000.00)</u></b> .</p>			

4. **Remaining Provisions:** All other provisions of the Agreement, and prior Amendment(s) if any, shall remain unchanged and in full force and effect as originally stated.

5. **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)


6. **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.

Amendment No. 1 – School Facility Consultants – Facilities Planning & Management Project - \$190,000.00


**OAKLAND UNIFIED SCHOOL DISTRICT**

  
\_\_\_\_\_  
Jody London, President,  
Board of Education

6/11/2020  
Date

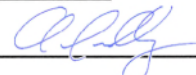
  
\_\_\_\_\_  
Kyla Johnson-Trammell, Superintendent  
Board of Education

6/11/2020  
Date

  
\_\_\_\_\_  
Tadashi Nakadegawa, Interim Deputy Chief,  
Facilities Planning and Management

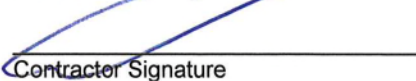
5/18/20  
Date

**Approval as to form:**

  
\_\_\_\_\_  
Arne Sandberg [name]  
General Counsel, Facilities, Planning and Management

5/18/20  
Date

**CONTRACTOR**

  
\_\_\_\_\_  
Contractor Signature  
Alexander R. Murdoch, President  
\_\_\_\_\_  
Print Name, Title

5/14/2020  
Date

e

**EXHIBIT "A"**  
**Scope of Work for Amendment**

**Contractor Name: School Facility Consultants**

1. Detailed Description of Services to be provided: Continue to provide and assist the District with on an ongoing basis to determine and acquire State funding eligibility for new school construction, the modernization of existing school facilities and joint-use projects under the School Facility Program, assist the District with the preparation and submittal of California Department of Education and State Allocation Board application, as described in proposal dated April 27, 2020 attached to this Amendment.

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



1303 J STREET, SUITE 500  
SACRAMENTO, CA 95814  
PHONE: (916) 441-5063  
FACSIMILE: (916) 441-2848  
WWW.S-F-C.ORG

April 27, 2020

Mr. Tadashi Nakadegawa  
Director of Facilities Planning & Management  
Oakland Unified School District  
955 High Street  
Oakland, CA 94601

4 MAY 20 4:26

**Subject: Proposed Contract Renewal**

FACILITIES MGMT

Dear Mr. Nakadegawa:

School Facility Consultants ("SFC") is pleased to submit this proposal for a contract renewal for the 2020-21 fiscal year. Our current contract with the Oakland Unified School District ("District") expires on June 30, 2020.

For over ten years School Facility Consultants has assisted the Oakland Unified School District in maximizing the building program by pursuing both State and Federal funds. During this period the State Allocation Board has funded applications prepared and filed by SFC totaling over \$184 million received by the District. Over the last several years, SFC worked closely with the District to finalize a comprehensive funding plan for the La Escuelita Educational Complex, including the preparation, submittal, and unfunded approval through the State Allocation Board of four separate funding components totaling over \$34 million. SFC also worked closely with the District in the preparation and approval of three projects under the Seismic Mitigation Program resulting in the receipt of almost \$3 million in State funds.

SFC continues to work toward maximizing funding opportunities and actively pursuing funding applications on behalf of the District utilizing a variety of School Facility Programs, as well as updating and generating additional modernization and new construction eligibility. Currently, SFC is assisting the District in the pursuit of additional modernization projects, ongoing assistance with the preparation of reports required under the School Facility Program, preparation of a Developer Fee Justification Report, and assistance with Career Technical Education projects.

I propose that SFC continue the services of the past year. The following list summarizes SFC's proposed services:

- Assist the District on an ongoing basis to determine and acquire State funding eligibility for new school construction, the modernization of existing school facilities and joint-use projects under the School Facility Program.
- Assist the District with the preparation and submittal of California Department of Education and State Allocation Board applications required for eligible new construction and modernization projects.



- Assist the District with accessing new funding programs as applicable.
- Assist the District with accessing additional eligibility that may be generated through AB 1014.
- Participate in strategy meetings, as directed, with the District and other designated personnel.
- Prepare periodic funding updates, which identify capital resources available to the District.
- Assist the District with issues related to portable classroom replacement.
- Assist the District with miscellaneous funding issues including the timing of fund release requests.
- Assist the District with preparation of progress reports required under the School Facility Program.
- Assist the District with project close out services as necessary in response to Office of Public School Construction project audits.
- Assist the District with the preparation and submittal of applications required to access available funding for eligible energy efficiency, conservation, and generation projects including Proposition 39 allocations.
- Assist the District with project tracking and accountability requirements for eligible Proposition 39 projects.
- Assist the District with planning services, as requested by the District, and as accepted by SFC.

The rate for these services is \$185 per hour for consulting services and \$95 per hour for administrative services with the total contract amount not to exceed \$190,000. The fees shall cover all expenses incurred in Sacramento by SFC on behalf of the District. If it becomes necessary for a Consultant from SFC to visit the District, the District will pay for travel time at a rate of \$185 per hour. The District will also reimburse SFC for all necessary and pre-approved travel expenses.

We look forward to continuing SFC's relationship with you and the Oakland Unified School District. Please call me with any comments or concerns on this proposed contract.

Sincerely,

A handwritten signature in blue ink, appearing to read "Alexander R. Murdoch". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Alexander R. Murdoch  
President

cc: Susie Butler-Berkley, Contract Analyst



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

05/14/2020

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> RSC Insurance Brokerage, Inc. 700 Airport Boulevard Suite 300 Burlingame CA 94010		<b>CONTACT NAME:</b> June Tong <b>PHONE (A/C, No, Ext):</b> (650) 762-0400 <b>FAX (A/C, No):</b> (650) 762-0490 <b>E-MAIL ADDRESS:</b> jtong@risk-strategies.com	
		<b>INSURER(S) AFFORDING COVERAGE</b>	
		<b>INSURER A:</b> Sentinel Ins. Co.	<b>NAIC #</b> 11000
		<b>INSURER B:</b> Republic Indemnity Co Of CA	43753
		<b>INSURER C:</b> Landmark American Ins Co	33138
		<b>INSURER D:</b>	
		<b>INSURER E:</b>	
		<b>INSURER F:</b>	
<b>INSURED</b> School Facility Consultants 1303 "j" Street, Suite 500 Sacramento CA 95814			

**COVERAGES**

CERTIFICATE NUMBER: CL19121943461

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.

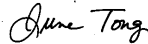
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b>	Y		57SBAKY7808	03/01/2020	03/01/2021	EACH OCCURRENCE	\$ 2,000,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000
	<input checked="" type="checkbox"/> Expanded GL form:						MED EXP (Any one person)	\$ 10,000
	<input type="checkbox"/> SS008 0405						PERSONAL & ADV INJURY	\$ 2,000,000
GEN'L AGGREGATE LIMIT APPLIES PER:							GENERAL AGGREGATE	\$ 4,000,000
<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC							PRODUCTS - COMP/OP AGG	\$ 4,000,000
OTHER:							HRDBB	\$ 2,000,000
A	<b>AUTOMOBILE LIABILITY</b>			57SBAKY7808	03/01/2020	03/01/2021	COMBINED SINGLE LIMIT (Ea accident)	\$ 2,000,000
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person)	\$
	<input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS						BODILY INJURY (Per accident)	\$
	<input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	\$
Hired Auto Phys Dam							\$ 50,000	
	<b>UMBRELLA LIAB</b>						EACH OCCURRENCE	\$
	<input type="checkbox"/> EXCESS LIAB						AGGREGATE	\$
	<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE							\$
DED RETENTION \$								\$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>	Y/N	N/A	17510712 & 17510714	04/30/2019	04/30/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)						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
C	Professional Liability			LHR839258	01/06/2020	01/06/2021	Claims Made	\$2,000,000
	Claims Made \$5,000 ded						Aggregate	\$2,000,000

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

If required by contract, Form #SS00080405 includes Blanket Additional Insureds, Primary wording and Waiver of Subrogation. Further, if required, 30 days notice except for 10 days on notices of cancellation, CA law.

ENDORSED Additional Insured: Oakland Unified School District and its directors, officers, employees, agents and representatives

**CERTIFICATE HOLDER****CANCELLATION**

Oakland Unified School District 955 High St  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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## DIVISION OF FACILITIES PLANNING & MANAGEMENT ROUTING FORM

### Project Information

<b>Project Name</b>	Facilities Planning & Management Project	<b>Site</b>	115
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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

<b>Contractor Name</b>	School Facility Consultants	<b>Agency's Contact</b>	Alexander Murdoch				
<b>OUSD Vendor ID #</b>	003812	<b>Title</b>	Owner				
<b>Street Address</b>	1303 J Street, Suite 500	<b>City</b>	Sacramento	<b>State</b>	CA	<b>Zip</b>	95814
<b>Telephone</b>	916-441-5063	<b>Policy Expires</b>					
<b>Contractor History</b>	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				
<b>OUSD Project #</b>	00918						

### Term of Original/Amended Contract

<b>Date Work Will Begin (i.e., effective date of contract)</b>	6-26-2019	<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>	6-30-2021

### 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>	\$ 190,000.00
<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
9650/0000	Fund 21 Msr J	210-9650-0-0000-8500-6289-918-9180-9905-9999-99999	6289	\$190,000.00

### 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.

	<b>Division Head</b>	<b>Phone</b>	510-535-7038	<b>Fax</b>	510-535-7082
<b>1.</b>	<b>Acting Director, Facilities Planning &amp; Management</b>				
	<b>Signature</b>			<b>Date Approved</b>	5/18/20
<b>2.</b>	<b>General Counsel, Department of Facilities Planning and Management</b>				
	<b>Signature</b>	As to form only		<b>Date Approved</b>	5/18/20
<b>3.</b>	<b>Interim Deputy Chief, Facilities Planning &amp; Management</b>				
	<b>Signature</b>			<b>Date Approved</b>	5/18/20
<b>4.</b>	<b>Chief Financial Officer</b>				
	<b>Signature</b>			<b>Date Approved</b>	
<b>5.</b>	<b>President, Board of Education</b>				
	<b>Signature</b>			<b>Date Approved</b>	






Board Office Use: Legislative File Info.	
File ID Number	19-1358
Introduction Date	6-26-2019
Enactment Number	19-1029
Enactment Date	6/26/19 os



# Memo

**To** Board of Education 

**From** Kyla Johnson-Trammell, Superintendent and Secretary, Board of Education  
Timothy White, Deputy Chief, Facilities Planning and Management

**Board Meeting Date** June 26, 2019

**Subject** Independent Consultant Agreement for Professional Services Greater Than \$92,600 - School Facility Consultants - Facilities Planning and Management Project

**Action Requested** Approval by the Board of Education to an Independent Consultant Agreement for Professional Services Greater Than \$92,600 between the District and School Facility Consultants, Sacramento, CA, for the latter to provide assisting the District in maximizing the building program by pursuing both State and Federal funds, including the preparation and submittal, of reports required under the School Facility Program and preparation of a Developer Fee Justification Report. See attached proposal for a more detailed description, in conjunction with the Facilities Planning and Management Department, more specifically delineated in the Scope of Services in Exhibit "A", incorporated herein by reference as though fully set forth, commencing July 1, 2019 and concluding no later than June 30, 2020, in an amount not-to-exceed \$190,000.00.

**Discussion** SFC continues to work toward maximizing funding opportunities and actively pursuing fund applications on behalf of the District.

**LBP** (Local Business Participation Percentage) 00.00%

**Recommendation** Approval by the Board of Education to an Independent Consultant Agreement for Professional Services Greater Than \$92,600 between the District and School Facility Consultants, Sacramento, CA, for the latter to provide assisting the District in maximizing the building program by pursuing both State and Federal funds, including the preparation and submittal, of reports required under the School Facility Program and preparation of a Developer Fee Justification Report. See attached proposal for a more detailed description, in conjunction with the Facilities Planning and Management Department, more specifically delineated in the Scope of Services in Exhibit "A", incorporated herein by reference as though fully set forth, commencing July 1, 2019 and concluding no later than June 30, 2020, in an amount not-to-exceed \$190,000.00.

**Fiscal Impact** Fund 21, Measure J

**Attachments**

- Independent Consultant Agreement including scope of work
- Consultant Proposal
- Certificate of Insurance



**CONTRACT JUSTIFICATION FORM**  
**This Form Shall Be Submitted to the Board Office**  
**With Every Consent Agenda Contract.**

**Legislative File ID No.** \_\_\_\_\_

**Department:** Facilities Planning and Management \_\_\_\_\_

**Vendor Name:** School Facility Consultants \_\_\_\_\_

**Project Name:** Facilities Planning and Management **Project No.:** 00918 \_\_\_\_\_

**Contract Term:** Intended Start: 7/1/2019 Intended End: 6/30/2020 \_\_\_\_\_

**Annual (if annual contract) or Total (if multi-year agreement) Cost:** \$190,000.00 \_\_\_\_\_

**Approved by:** Tadashi Nakadegawa \_\_\_\_\_

**Is Vendor a local Oakland Business or have they meet the requirements of the**

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

**How was this Vendor selected?**

**Summarize the services this Vendor will be providing.**

Yearly summary of applications for funding review and revision on and pending applications, representation on all State Allocation Board Meeting and Consulting with Office of Public School Construction

**Was this contract competitively bid?**  Yes (No if Unchecked)

If No, please answer the following:

1) How did you determine the price is competitive?

2) Please check the competitive bid exception relied upon:

- Educational Materials**
- Special Services** contracts for financial, economic, accounting, legal or administrative services
- CUPCCAA Exception** (Uniform Public Construction Cost Accounting Act)
- Professional Service Agreements** of less than \$90,200 (increases a small amount on January 1 of each year)
- Construction related Professional Services** such as Architects, DSA Inspectors, Environmental Consultants and Construction Managers (require a "fair, competitive selection process)
- Energy** conservation and alternative energy supply (e.g., solar, energy conservation, co-generation and alternative energy supply sources)
- Emergency** contracts
- Technology** contracts
  - electronic data-processing systems, supporting software and/or services (including copiers/printers) over the \$86,000 bid limit, must be competitively advertised, but any one of the three lowest responsible bidders may be selected
  - contracts for computers, software, telecommunications equipment, microwave equipment, and other related electronic equipment and apparatus, including E-Rate solicitations, may be procured through an RFP process instead of a competitive, lowest price bid process
  - Western States Contracting Alliance Contracts (WSCA)
  - California Multiple Award Schedule Contracts (CMAS) [contracts are often used for the purchase of information technology and software]
- "Piggyback" Contracts** with other governmental entities
- Perishable Food**
- Sole Source**
- Change Order for Material and Supplies** if the cost agreed upon in writing does not exceed ten percent of the original contract price
- Other, please provide specific exception**

3)  **Not Applicable - no exception - Project was competitively bid**

**INDEPENDENT CONSULTANT AGREEMENT FOR PROFESSIONAL SERVICES**  
**Greater than \$92,600**

This Independent Consultant Agreement for Professional Services ("Agreement") is made and entered into as of the **27th day of June 2019**, by and between the **Oakland Unified School District** ("District") and **School Facility Consultants** ("Consultant"), (together, "Parties").

**WHEREAS**, the District is authorized to contract with and employ any persons for the furnishing of special and professional services and advice if those persons are specially trained and experienced and competent to perform the services required;

**WHEREAS**, the District is in need of such services and advice and the Consultant warrants that it is specially trained, licensed and experienced and competent to perform the services required by the District;

**WHEREAS**, the Consultant agrees to perform the services described in this Agreement in accordance with the standards of its profession, to District's satisfaction, and in accordance with this Agreement.

**NOW, THEREFORE**, the Parties agree as follows:

1. **Services.** Consultant shall furnish to the District the following services, as more fully described in **Exhibit "A,"** attached hereto and incorporated herein by this reference ("Services"):

Scope of services to includes School Facility Consultants to provide assistance to the District in maximizing the building program by pursuing both State and Federal funds, including the preparation and submittal of reports required under the School Facility Program and preparation of a Developer Fee Justification report.

2. **Term.** Consultant shall commence providing Services under this Agreement on **July 1, 2019**, and will diligently perform as required and complete performance by **June 30, 2020**, unless this Agreement is terminated and/or otherwise cancelled prior to that time. This Agreement may be extended upon mutual approval of both parties in writing on an annual basis to the extent permissible under applicable law.
3. **Submittal of Documents.** The Consultant shall not commence the Services under this Contract until the Consultant has submitted and the District has approved the certificate(s) and affidavit(s), and the endorsement(s) of insurance required as indicated below:

<input checked="" type="checkbox"/> Signed Agreement	<input type="checkbox"/> W-9 Form
<input checked="" type="checkbox"/> Insurance Certificates & Endorsements	<input checked="" type="checkbox"/> Workers' Compensation Certificate
<input checked="" type="checkbox"/> Debarment Certification	<input type="checkbox"/> Other: _____
<input checked="" type="checkbox"/> Fingerprinting/Criminal Background Investigation Certification	

4. **Compensation.** District agrees to pay Consultant for Services satisfactorily rendered pursuant to this Agreement, a not to exceed fee of **ONE HUNDRED NINETY THOUSAND DOLLARS, NO/100 (\$190,000.00)**, paid monthly in proportion to Services performed.

- 4.1. District shall pay Consultant for all undisputed amounts in installment payments within thirty (30) days after the Consultant submits an invoice to the District for Services actually completed and after the District's written approval of the Services, or the portion of the Services for which payment is to be made (such approval not to be unreasonably withheld or delayed).

- 4.2. Any disputed Invoiced amount which cannot be resolved in good faith between the Parties within fifteen (15) business days shall be resolved in accordance with Section 25 below.
5. **Expenses.** Expenses will not be charged for Consultant's performance of these Services.
6. **Materials.** Consultant shall furnish, at its own expense, all labor, materials, equipment, supplies and other items necessary to complete the services to be provided pursuant to this Agreement.
7. **Local, Small Local and Small Local Resident Business Enterprise (L/SL/SLRBE) Program:** Consultant shall comply with the requirements of District's L/SL/SLRBE Program, as applicable, which may require a fifty percent (50%) mandatory minimum local participation requirement in the performance of this Agreement. A copy of the District's Local Business Participation Policy can be obtained on the District's website, at [www.ousd.k12.ca.us](http://www.ousd.k12.ca.us), under District Services, Facilities Planning & Management Department, Bids and Requests for Proposals.
8. **Independent Contractor.** Consultant, in the performance of this Agreement, shall be and act as an independent contractor. Consultant understands and agrees that it and all of its employees shall not be considered officers, employees, agents, partner, or joint venture of the District, and are not entitled to benefits of any kind or nature normally provided employees of the District and/or to which District's employees are normally entitled, including, but not limited to, State Unemployment Compensation or Worker's Compensation. Consultant 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 Consultant's employees. In the performance of the Services herein contemplated, Consultant shall have the sole authority for controlling and directing the performance of the details of the work, District being interested only in the results obtained.
9. **Performance of Services / Standard of Care.**
- 9.1. **Standard of Care.** Consultant represents that Consultant has the qualifications and ability to perform the Services in a professional manner, without the advice, control or supervision of District. Consultant'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. Consultant's Services will be performed with due care and in accordance with applicable law, code, rule, regulation, and/or ordinance.
- 9.1.1. Consultant hereby represents that it possesses the necessary professional capabilities, qualifications, licenses, skilled personnel, experience, expertise, and financial resources, and it has available and will provide the necessary equipment, materials, tools, and facilities to perform the Services in an efficient, professional, and timely manner in accordance with the terms and conditions of the Agreement.
- 9.1.2. Consultant shall be responsible for the professional quality, technical accuracy, completeness, and coordination of the Services, and Consultant understands that the District relies upon such professional quality, accuracy, completeness, and coordination by Consultant in performing the Services.
- 9.1.3. Consultant shall ensure that any individual performing work under the Agreement requiring a California license shall possess the appropriate license required by the State of California. All personnel shall have sufficient skill and experience to perform the work assigned to them.
- 9.1.4. Consultant shall carefully study and compare all documents, findings, and other instructions and shall at once report to District, in writing, any error, inconsistency, or



omission that Consultant or its employees may discover. Consultant shall use professional efforts in identifying any errors, inconsistencies, or omissions.

- 9.1.5. Any representations, recommendations, opinions or conclusions relating to the Services provided by Consultant must be made in writing by duly authorized representatives of Consultant.
- 9.2. **Meetings.** Consultant and District agree to participate in regular meetings to discuss strategies, timetables, implementations of services, and any other issues deemed relevant to the operation of Consultant's performance of Services.
- 9.3. **District Approval.** The work completed herein must meet the approval of the District and shall be subject to the District's general right of inspection and supervision to secure the satisfactory completion thereof.
10. **Originality of Services.** Except as to standard generic details, Consultant agrees that all technologies, formulae, procedures, processes, methods, writings, ideas, dialogue, compositions, recordings, teleplays and video productions prepared for, written for, or submitted to the District and/or used in connection with this Agreement, shall be wholly original to Consultant and shall not be copied in whole or in part from any other source, except that submitted to Consultant by District as a basis for such services.
11. **Copyright/Trademark/Patent.** Consultant understands and agrees that all matters produced under this Agreement shall become the property of District and cannot be used without District's express written permission. District 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 the District (specifically excluding any underlying pre-existing intellectual property). District may, with Consultant's prior written consent, use Consultant's name in conjunction with the sale, use, performance and distribution of the matters, for any purpose and in any medium.
12. **Termination.**
  - 12.1. **For Convenience by District.** District may, at any time, with or without reason, terminate this Agreement and compensate Consultant only for services satisfactorily rendered to the date of termination. Written notice by District shall be sufficient to stop further performance of services by Consultant. Notice shall be deemed given when received by the Consultant or no later than three (3) calendar days after the day of mailing, whichever is sooner.
  - 12.2. **For Convenience by Consultant.** Consultant may, upon sixty (60) days notice, with or without reason, terminate this Agreement. Upon this termination, District shall only be obligated to compensate Consultant for services satisfactorily rendered to the date of termination. Written notice by Consultant shall be sufficient to stop further performance of services to District. Consultant acknowledges that this sixty (60) day notice period is acceptable so that the District can attempt to procure the Services from another source.
  - 12.3. **With Cause by District.** District may terminate this Agreement upon giving of written notice of intention to terminate for cause. Cause shall include:
    - 12.3.1. material violation of this Agreement by the Consultant; or
    - 12.3.2. any act by Consultant exposing the District to liability to others for personal injury or property damage; or

12.3.3. Consultant is adjudged a bankrupt, Consultant makes a general assignment for the benefit of creditors or a receiver is appointed on account of Consultant's Insolvency.

Written notice by District shall contain the reasons for such intention to terminate and, unless within three (3) calendar days after that notice the condition or violation shall cease or satisfactory arrangements for the correction thereof be made, this Agreement shall upon the expiration of the three (3) calendar days cease and terminate. In the event of this termination, the District may secure the required Services from another Consultant. If the expense, fees, and/or costs to the District exceeds the cost of providing the Services pursuant to this Agreement, the Consultant shall immediately pay the excess expense, fees, and/or costs to the District upon the receipt of the District's notice of these expense, fees, and/or costs. The foregoing provisions are in addition to and not a limitation of any other rights or remedies available to District.

12.4. Upon termination, Consultant shall provide the District with all documents produced maintained or collected by Consultant pursuant to this Agreement, whether or not such documents are final or draft documents.

13. **Indemnification.** To the furthest extent permitted by California law, Consultant shall indemnify, and hold harmless the District, its Governing Board, agents, representatives, officers, consultants, employees, trustees, and volunteers ("the Indemnified Parties") from any and all claims, arising out of, pertaining to or relating to the negligence, recklessness, errors or omissions, or willful misconduct of Consultant. Consultant shall, to the fullest extent permitted by California law, defend the Indemnified Parties at Consultant's own expense, including attorneys' fees and costs, from any and all claims arising out of, pertaining to, or relating to the negligence, recklessness, or willful misconduct of Consultant. The District shall have the right to accept or reject any legal representation that Consultant proposes to defend the Indemnified parties.

14. **Insurance.**

14.1. Consultant shall procure and maintain at all times it performs any portion of the Services the following Insurance with minimum limits equal to the amount indicated below.

14.1.1. **Commercial General Liability and Automobile Liability Insurance.** Commercial General Liability Insurance and Any Auto Automobile Liability Insurance that insure against all claims of bodily injury, property damage, personal injury, death, advertising injury, and medical payments arising from Consultant's performance of any portion of the Services. (Form CG 0001 and CA 0001)

14.1.2. **Workers' Compensation and Employers' Liability Insurance.** Workers' Compensation Insurance and Employers' Liability Insurance for all of its employees performing any portion of the Services. In accordance with provisions of section 3700 of the California Labor Code, the Consultant shall be required to secure workers' compensation coverage for its employees. If any class of employee or employees engaged in performing any portion of the Services under this Agreement are not protected under the Workers' Compensation Statute, adequate insurance coverage for the protection of any employee(s) not otherwise protected must be obtained before any of those employee(s) commence performing any portion of the Services.

14.1.3. **Professional Liability (Errors and Omissions).** Professional Liability (Errors and Omissions) Insurance as appropriate to the Consultant's profession.

Type of Coverage	Minimum Requirement
------------------	---------------------

<b>Commercial General Liability Insurance</b> , including Bodily Injury, Personal Injury, Property Damage, Advertising Injury, and Medical Payments	
Each Occurrence	\$ 1,000,000
General Aggregate	\$ 2,000,000
<b>Automobile Liability Insurance - Any Auto</b>	
Each Occurrence	\$ 1,000,000
General Aggregate	\$ 2,000,000
<b>Professional Liability</b>	\$ 1,000,000
<b>Workers Compensation</b>	Statutory Limits
<b>Employer's Liability</b>	\$ 1,000,000

14.2. **Proof of Carriage of Insurance.** Consultant shall not commence performing any portion of the Services until all required insurance has been obtained and certificates indicating the required coverage's have been delivered in duplicate to the District and approved by the District. Certificates and insurance policies shall include the following:

14.2.1. A clause stating: "This policy shall not be canceled or reduced in required limits of liability or amounts of insurance until notice has been mailed to the District, stating date of cancellation or reduction. Date of cancellation or reduction shall not be less than thirty (30) days after date of mailing notice."

14.2.2. Language stating in particular those insured, extent of insurance, location and operation to which insurance applies, expiration date, to whom cancellation and reduction notice will be sent, and length of notice period.

14.2.3. An endorsement stating that the District and its Governing Board, agents, representatives, employees, trustees, officers, consultants, and volunteers are named additional insureds under all policies except Workers' Compensation Insurance, Professional Liability, and Employers' Liability Insurance. An endorsement shall also state that Consultant's insurance policies shall be primary to any insurance or self-insurance maintained by District. An endorsement shall also state that there shall be a waiver of any subrogation.

14.2.4. All policies except the Professional Liability, Workers' Compensation, and Employers' Liability Insurance shall be written on an occurrence form.

14.3. **Acceptability of Insurers.** Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: VII, unless otherwise acceptable to the District.

15. **Assignment.** The obligations of the Consultant pursuant to this Agreement shall not be assigned by the Consultant.

16. **Compliance with Laws.** Consultant shall observe and comply with all applicable rules and regulations of the governing board of the District and all applicable federal, state, and local laws, ordinances and regulations. Consultant shall give all notices required by any law, ordinance, rule and regulation bearing on conduct of the Services as indicated or specified. If Consultant observes that any of the Services required by this Agreement are at variance with any such laws, ordinance, rules or regulations, Consultant shall notify the District, in writing, and, at the sole option of the District, any necessary changes to the scope of the Services shall be made and this Agreement shall be appropriately amended in writing, or this Agreement shall be terminated effective upon Consultant's receipt of a written termination notice from the District. If Consultant knowingly performs any work that is in violation of any laws, ordinances, rules or regulations, without first notifying the District of the violation, Consultant shall bear all costs arising therefrom.

17. **Certificates/Permits/Licenses/Registration.** Consultant and all Consultant's employees or agents shall secure and maintain in force such certificates, permits, licenses and registration as are required by law in connection with the furnishing of Services pursuant to this agreement.
18. **Safety and Security.** Consultant is responsible for maintaining safety in the performance of this Agreement. Consultant shall be responsible to ascertain from the District the rules and regulations pertaining to safety, security, and driving on school grounds, particularly when children are present.
19. **Employment with Public Agency.** Consultant, if an employee of another public agency, agrees that Consultant will not receive salary or remuneration, other than vacation pay, as an employee of another public agency for the actual time in which services are actually being performed pursuant to this Agreement.
20. **Anti-Discrimination.** It is the policy of the District that in connection with all work performed under contracts there be no discrimination against any employee engaged in the work because of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status and therefore the Consultant 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 District policy. In addition, the Consultant agrees to require like compliance by all its subcontractor(s).
21. **Fingerprinting of Employees.** The Fingerprinting/Criminal Background Investigation Certification must be completed and attached to this Agreement prior to Consultant's performing of any portion of the Services. Although District has determined that fingerprinting is not applicable to this Agreement, Consultant expressly acknowledges that the following conditions shall apply to any work performed by Consultant and/or Consultant's employees on a school site:
- 21.1. All site visits shall be arranged through the District;
  - 21.2. Consultant and Consultant's employees shall inform District of their proposed activities and location at the school site, allowing District time to arrange site visits without a disruption to the educational process;
  - 21.3. Consultant and/or Consultant's employees shall check in with the school office each day immediately upon arriving at the school site;
  - 21.4. Once at such location, Consultant and Consultant's employees shall not change locations without contacting the District;
  - 21.5. Consultant and Consultant's employees shall not use student restroom facilities; and
  - 21.6. If Consultant and Consultant's employees find themselves alone with a student, Consultant and Consultant's employees shall immediately contact the school office and request that a member of the school staff be assigned to the work location.
22. **Audit.** Consultant shall establish and maintain books, records, and systems of account, in accordance with generally accepted accounting principles, reflecting all business operations of Consultant transacted under this Agreement. Consultant shall retain these books, records, and systems of account during the Term of this Agreement and for three (3) years thereafter. Consultant shall permit the District, its agent, other representatives, or an independent auditor to audit, examine, and make excerpts, copies, and transcripts from all books and records, and to make audit(s) of all billing statements, invoices, records, and other data related to the Services covered by this Agreement. Audit(s) may be performed at any time, provided that the District

shall give reasonable prior notice to Consultant and shall conduct audit(s) during Consultant's normal business hours, unless Consultant otherwise consents.

**23. 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.

**24. District's Evaluation of Consultant and Consultant's Employees and/or Subcontractors.** The District may evaluate the Consultant in any manner which is permissible under the law. The District's evaluation may include, without limitation:

24.1. Requesting that District employee(s) evaluate the Consultant and the Consultant's employees and subcontractors and each of their performance.

24.2. Announced and unannounced observance of Consultant, Consultant's employee(s), and/or subcontractor(s).

**25. Limitation of District Liability.** Other than as provided in this Agreement, District'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 District 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.

**26. Disputes:** In the event of a dispute between the parties as to performance of the Services, the interpretation of this Agreement, or payment or nonpayment for work performed or not performed, the parties shall attempt to resolve the dispute in good faith. Pending resolution of the dispute, Consultant agrees it will neither rescind the Agreement nor stop the performance of the Services, but will allow determination by the court of the State of California, in the county in which the District's administration office is located, having competent jurisdiction of the dispute. Disputes may be determined by mediation if mutually agreeable, otherwise by litigation. Notice of the demand for mediation of a dispute shall be filed in writing with the other party to the Agreement. The demand for mediation shall be made within a reasonable time after written notice of the dispute has been provided to the other party, but in no case longer than ninety (90) days after initial written notice. If a claim, or any portion thereof, remains in dispute upon satisfaction of all applicable dispute resolution requirements, the Consultant shall comply with all claims presentation requirements as provided in Chapter 1 (commencing with section 900) and Chapter 2 (commencing with section 910) of Part 3 of Division 3.6 of Title 1 of Government Code as a condition precedent to the Consultant's right to bring a civil action against the District. For purposes of those provisions, the running of the time within which a claim must be presented to the District shall be tolled from the time the Consultant submits its written claim until the time the claim is denied, including any time utilized by any applicable meet and confer process.

**27. Confidentiality.** The Consultant and all Consultant's agents, personnel, employee(s), and/or subcontractor(s) shall maintain the confidentiality of all information received in the course of performing the Services. This requirement to maintain confidentiality shall extend beyond the termination of this Agreement.

**28. Notice.** Any notice required or permitted to be given under this Agreement shall be deemed to have been given, served, and received if given in writing and either personally delivered or deposited in the United States mail, registered or certified mail, postage prepaid, return receipt required, or sent by overnight delivery service, or facsimile transmission, addressed as follows:

Oakland Unified School District  
955 High Street  
Oakland, CA 94601  
Tel: 510-535-2731; Fax: 510-535-7082

School Facility Consultants  
1303 J Street, Suite 500  
Sacramento, CA 95814  
Tel: 916-441-5063

ATTN: Timothy White

ATTN: Alexander Murdoch

Any notice personally given or sent by facsimile transmission shall be effective upon receipt. Any notice sent by overnight delivery service shall be effective the business day next following delivery thereof to the overnight delivery service. Any notice given by mail shall be effective three (3) days after deposit in the United States mail.

29. **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.
30. **California Law.** This Agreement shall be governed by and the rights, duties and obligations of the Parties shall be determined and enforced in accordance with the laws of the State of California. The Parties further agree that any action or proceeding brought to enforce the terms and conditions of this Agreement shall be maintained in the county in which the District's administration offices are located.
31. **Waiver.** The waiver by either party of any breach of any term, covenant, or condition herein contained shall not be deemed to be a waiver of such term, covenant, condition, or any subsequent breach of the same or any other term, covenant, or condition herein contained.
32. **Severability.** If any term, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions will nevertheless continue in full force and effect, and shall not be affected, impaired or invalidated in any way.
33. **Incorporation of Recitals and Exhibit.** The Recitals and exhibit attached hereto are hereby incorporated herein by reference.
34. **Provisions Required By Law Deemed Inserted.** Each and every provision of law and clause required by law to be inserted in this Agreement shall be deemed to be inserted herein and this Agreement shall be read and enforced as though it were included therein.
35. **Authority to Bind Parties.** Neither party in the performance of any and all duties under this Agreement, except as otherwise provided in this Agreement, has any authority to bind the other to any agreements or undertakings.
36. **Attorney's Fees/Costs.** Should litigation be necessary to enforce any terms or provisions of this Agreement, then each party shall bear its own litigation and collection expenses, witness fees, court costs and attorney's fees.
37. **Captions and Interpretations.** Paragraph headings in this Agreement are used solely for convenience, and shall be wholly disregarded in the construction of this Agreement. No provision of this Agreement shall be interpreted for or against a party because that party or its legal representative drafted such provision, and this Agreement shall be construed as if jointly prepared by the Parties.
38. **Calculation of Time.** For the purposes of this Agreement, "days" refers to calendar days unless otherwise specified.
39. **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 properly authority and empowered to enter into this Agreement.



**40. 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.

**Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion:** The District certifies to the best of its knowledge and belief, that it and its officials: 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/portal/public/SAM>



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**Tadashi Nakadegawa**  
**Director of Facilities Planning & Management**

**[SIGNATURES ON NEXT PAGE]**

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement on the date indicated below:

**OAKLAND UNIFIED SCHOOL DISTRICT**

<i>Almee Eng</i>	6/27/19
Almee Eng, President, Board of Education	Date
<i>[Signature]</i>	6/27/19
Kyla Johnson-Trammell, Superintendent & Secretary, Board of Education	Date
<i>[Signature]</i>	
Timothy White, Deputy Chief, Facilities Planning and Management	Date

**APPROVED AS TO FORM:**

<i>Kelley M. Lem</i>	6-4-19
OUSD Facilities Legal Counsel	Date

**CONSULTANT**

<i>[Signature]</i>	5/23/19
Alexander R. Murdoch, President, School Facility Consultants	Date

**Information regarding Consultant:**

Consultant: School Facility Consultants

License No.: 88462

Address: 1303 J Street, Suite 600  
Sacramento, CA 95814

Telephone: (916) 441-5083

Facsimile: (916) 441-2848

E-Mail: alex@sf-cs.org

Type of Business Entity:  
 Individual  
 Sole Proprietorship  
 Partnership  
 Limited Partnership  
 Corporation, State: CA  
 Limited Liability Company  
 Other: \_\_\_\_\_

<p>68-0100909</p> <p>Employer Identification and/or Social Security Number</p> <p><b>NOTE: United States Code, title 26, sections 6041 and 6109 require non-corporate recipients of \$600 or more to furnish their taxpayer identification number to the payer. The United States Code also provides that a penalty may be imposed for failure to furnish the taxpayer identification number. In order to comply with these rules, the District requires your federal tax identification number or Social Security number, whichever is applicable.</b></p>
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**WORKERS' COMPENSATION CERTIFICATION**

Labor Code section 3700 In relevant part provides:

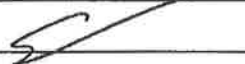
Every employer except the State shall secure the payment of compensation In one or more of the following ways:

- a. By being insured against liability to pay compensation by one or more insurers duly authorized to write compensation Insurance in this state.
  
- b. By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees.

I am 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 I will comply with such provisions before commencing the performance of the Work of this Contract.

Date: May 23, 2019

Proper Name of Consultant: School Facility Consultants

Signature:  \_\_\_\_\_

Print Name: Alexander R. Murdoch

Title: President

(In accordance with Article 5 - commencing at section 1860, chapter 1, part 7, division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any Work under this Contract.)


**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND  
VOLUNTARY EXCLUSION**

The undersigned is aware of and hereby certify that neither **School Facility Consultants** ("Consultant") nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency. Further, the undersigned agrees to include this clause without modification in all lower tier transactions, solicitations, proposals, contracts and subcontracts.

Where the Consultant or any lower participant is unable to certify to this statement, it shall attach an explanation hereto.

IN WITNESS WHEREOF, this instrument has been duly executed by the Principal of the above named Consultant on the 23rd day of May 2019 for the purposes of submission of this Agreement.

By:

  
\_\_\_\_\_  
Signature

Alexander R. Murdoch

\_\_\_\_\_  
Typed or Printed Name

President

\_\_\_\_\_  
Title

**FINGERPRINTING/CRIMINAL BACKGROUND INVESTIGATION CERTIFICATION**

One of the three boxes below **must** be checked, with the corresponding certification provided, and this form attached to the Independent Consultant Agreement for Professional Services ("Agreement"):

- Consultant's employees will have only limited contact, if any, with District pupils and the District will take appropriate steps to protect the safety of any pupils that may come in contact with Consultant's employees so that the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 shall not apply to Consultant for the services under this Agreement. As an authorized District official, I am familiar with the facts herein certified, and am authorized to execute this certificate on behalf of the District. (Education Code § 45125.1 (c))

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

District Representative's Name and Title: \_\_\_\_\_

District Representative's Signature: \_\_\_\_\_

- The fingerprinting and criminal background investigation requirements of Education Code section 45125.1 apply to Consultant's services under this Agreement and Consultant certifies its compliance with these provisions as follows: *"Consultant certifies that the Consultant has complied with the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 with respect to all Consultant's employees, subcontractors, agents, and subcontractors' employees or agents ("Employees") regardless of whether those Employees are paid or unpaid, concurrently employed by the District, or acting as independent contractors of the Consultant, who may have contact with District 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. A complete and accurate list of all Employees who may come in contact with District pupils during the course and scope of the Agreement is attached hereto."*

- Consultant's services under this Agreement shall be limited to the construction, reconstruction, rehabilitation, or repair of a school facility and although all Employees will have contact, other than limited contact, with District pupils, pursuant to Education Code section 45125.2 District shall ensure the safety of the pupils by at least one of the following as marked:

- The installation of a physical barrier at the worksite to limit contact with pupils.
- Continual supervision and monitoring of all Consultant's on-site employees of Consultant by an employee of Consultant, \_\_\_\_\_, whom the Department of Justice has ascertained has not been convicted of a violent or serious felony.
- Surveillance of Employees by District personnel.

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

District Representative's Name and Title: \_\_\_\_\_

District Representative's Signature: \_\_\_\_\_

I am a representative of the Consultant entering into this Agreement with the District and I am familiar with the facts herein certified, and am authorized and qualified to execute this certificate on behalf of Consultant.

Date: May 23, 2019

Name of Consultant: School Facility Consultants

Signature: 

Print Name and Title: Alexander R. Murdoch, President

**EXHIBIT "A"**  
**DESCRIPTION OF SERVICES TO BE PERFORMED BY CONSULTANT**



April 24, 2019

Mr. Timothy White  
Deputy Chief of Facilities Planning & Management  
Oakland Unified School District  
955 High Street  
Oakland, CA 94601

**Subject: Proposed Contract Renewal**

Dear Mr. White:

School Facility Consultants ("SFC") is pleased to submit this proposal for a contract renewal for the 2019-20 fiscal year. Our current contract with the Oakland Unified School District ("District") expires on June 30, 2019.

For over ten years School Facility Consultants has assisted the Oakland Unified School District in maximizing the building program by pursuing both State and Federal funds. During this period the State Allocation Board has funded applications prepared and filed by SFC totaling over \$184 million received by the District. Over the last several years, SFC worked closely with the District to finalize a comprehensive funding plan for the La Escuelita Educational Complex, including the preparation, submittal, and unfunded approval through the State Allocation Board of four separate funding components totaling over \$34 million. SFC also worked closely with the District in the preparation and approval of three projects under the Seismic Mitigation Program resulting in the receipt of almost \$3 million in State funds.

SFC continues to work toward maximizing funding opportunities and actively pursuing funding applications on behalf of the District utilizing a variety of School Facility Programs, as well as updating and generating additional modernization and new construction eligibility. Currently, SFC is assisting the District in the pursuit of additional modernization projects, ongoing assistance with the preparation of reports required under the School Facility Program, preparation of a Developer Fee Justification Report, and assistance with the submittal of its Proposition 39 Energy Expenditure Plan.

I propose that SFC continue the services of the past year. The following list summarizes SFC's proposed services:

- Assist the District on an ongoing basis to determine and acquire State funding eligibility for new school construction, the modernization of existing school facilities and joint-use projects under the School Facility Program.
- Assist the District with the preparation and submittal of California Department of Education and State Allocation Board applications required for eligible new construction and modernization projects.

- Assist the District with accessing new funding programs as applicable.
- Assist the District with accessing additional eligibility that may be generated through AB 1014.
- Participate in strategy meetings, as directed, with the District and other designated personnel.
- Prepare periodic funding updates, which identify capital resources available to the District.
- Assist the District with issues related to portable classroom replacement.
- Assist the District with miscellaneous funding issues including the timing of fund release requests.
- Assist the District with preparation of progress reports required under the School Facility Program.
- Assist the District with project close out services as necessary in response to Office of Public School Construction project audits.
- Assist the District with the preparation and submittal of applications required to access available funding for eligible energy efficiency, conservation, and generation projects including Proposition 39 allocations.
- Assist the District with project tracking and accountability requirements for eligible Proposition 39 projects.
- Assist the District with planning services, as requested by the District, and as accepted by SFC.

The rate for these services is \$185 per hour for consulting services and \$95 per hour for administrative services with the total contract amount not to exceed \$190,000. The fees shall cover all expenses incurred in Sacramento by SFC on behalf of the District. If it becomes necessary for a Consultant from SFC to visit the District, the District will pay for travel time at a rate of \$185 per hour. The District will also reimburse SFC for all necessary and pre-approved travel expenses.

We look forward to continuing SFC's relationship with you and the Oakland Unified School District. Please call me with any comments or concerns on this proposed contract.

Sincerely,



Alexander R. Murdoch  
President

cc: Tadashi Nakadegawa, Director of Facilities, Construction  
Susie Butler-Berkley, Contract Analyst



**POLICY NUMBER:** 57 SBA KY7808



**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

ADDITIONAL INSURED - PERSON-ORGANIZATION

OAKLAND UNIFIED SCHOOL DISTRICT,  
ITS DIRECTORS, OFFICERS, EMPLOYEES, AGENTS, AND  
REPRESENTATIVES  
955 HIGH ST.  
OAKLAND, CA 94601



Department of Facilities Planning and Management

ROUTING FORM

Project Information

Project Name Facilities Planning and Management Site 210

Basic Directions

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

Attachment Checklist Proof of general liability insurance, including certificates and endorsements, if contract is over \$15,000 Workers compensation insurance certification, unless vendor is a sole provider

Contractor Information

Contractor Name School Facility Consultants Agency's Contact Alexander Murdoch OUSD Vendor ID # 003812 Vendor Title: Address 1303 J Street, Suite 500 Sacramento, CA 95814 Telephone 9164415063 Policy Expires: 1-6-2020 Contractor History Previously been an OUSD contractor? Yes Worked as an OUSD employee? Yes OUSD Project # 00918

Term

Date Work Will Begin 7/1/2019 Date Work Will End By 6/30/2020 (not more than 5 years from start date)

Compensation

Total Contract Amount Total Contract Not To Exceed \$190,000.00 Pay Rate Per Hour (if Hourly) If Amendment, Changed Amount Other Expenses Requisition Number

Budget Information

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

Table with 5 columns: Resource #, Funding Source, Org Key, Object, Amount. Row 1: 9450/0000, Fund 21, Measure J, 210-9450-0-0000-8500-6289-918-9180-9905-9999-99999, 6289, \$190,000.00

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.

Division Head Phone 510-535-7038 Fax 510-535-7082 1. Director, Department of Facilities Planning and Management Signature Date Approved 5/20/19 2. General Counsel, Department of Facilities Planning and Management Signature Kelly M. Rem Date Approved (as to form) 6-4-19 3. Deputy Chief, Department of Facilities Planning and Management Signature Date Approved 4. Senior Business Officer, Board of Education Signature Date Approved 5. President, Board of Education Signature Date Approved