Board Office Use: Les	gislative File Info.
File ID Number	12-0542
Committee	Facilities
Introduction Date	2-22-2012
Enactment Number	12-0829
Enactment Date	2-22-1222



# Memo

То	Board of Education
From	Tony Smith, Ed.D., Superintendent Timothy White, Associate Superintendent, Facilities Planning and Management
Board Meeting Date	February 22, 2012
Subject	Independent Consultant Agreement - Jason Zalinski - Arroyo Viejo CDC Renovation Project
Action Requested	Approval by the Board of Education of an Independent Consultant Agreement with Jason Zalinski for Division of State Inspection Services on behalf of the District at Arroyo Viejo CDC Renovation Project,, in an amount not-to exceed \$107,100.00. The term of this Agreement shall commence on March 15, 2012 and shall conclude no later than December 31, 2013.
Background	The State of California requires the project be inspected for conformance to the state approved contract documents by a Division of State Architect (DSA) Project Inspector.
Local Business Participation Percentage	100.00%
Strategic Alignment	Among the key purposes of the District's Facilities Master Plan is to provide an academic environment for the Oakland community that will give every student, educator, and community member using our facilities the best possible opportunity for learning.
	Through implementation of the Facilities Master Plan, the District intends to improve the District's facilities in terms of structural integrity, safety, reliability of operating (mechanical) systems, access to modern resources, number and type of appropriate laboratories and specialized instruction rooms, opportunities for physical education, and attractiveness, such that the Oakland Public Schools are second to none. Operation of the District schools under the planned approach is intended to ensure safety, cleanliness, and orderliness for all individuals participating in the learning process.



	The basic facility needs of students such as proper lighting, functional roofs, noise control and well maintained buildings, not only convey the message that we value our students and teachers but may foster a sense of school pride and community ownership which may improve attitudes towards learning. The implementation of the Facilities Master Plan is our first step in that direction.
Recommendation	Approval by the Board of Education of an Independent Consultant Agreement with Jason Zalinski for Division of State Inspection Services on behalf of the District at Arroyo Viejo CDC Renovation Project,, in an amount not-to exceed \$107,100.00. The term of this Agreement shall commence on March 15, 2012 and shall conclude no later than December 31, 2013.
Fiscal Impact	The funding sources for this project are Resource Codes: 9299, 9399 and 9499.
Attachments	Independent Consultant Agreement including scope of work

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#### INDEPENDENT CONSULTANT AGREEMENT

This Independent Consultant Agreement for Services ("Agreement") is made as of January 31, 2012, between the Oakland Unified School District ("District") and Jason Zalinski ("Consultant") (together, "Parties") for the <u>Arroyo Viejo CDC Renovation of Building</u> <u>Project</u>.

- 1. Services. The Consultant shall furnish to the District the services as described in Exhibit "A" attached hereto and incorporated herein by this reference ("Services" or "Work")— Proposal dated <u>December 2, 2011.</u>
- 2. **Term**. Consultant shall commence providing services under this Agreement upon execution of the Agreement by both parties, and will diligently perform such services as required. The term for services and schedule to provide services shall be in accordance with the schedule included in the Consultant's Proposal, Attachment "A;"
- 3. **Submittal of Documents**. The Consultant shall not commence the Work 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;
  - Signed Agreement

     Workers' Compensation Certificate, if necessary

     Criminal Background Investigation Certification, if necessary

     Insurance Certificates and Endorsements

     W-9 Form
- 4. **Compensation**. District compensation to the Consultant shall be as set forth in Exhibit "A" as the proposed fee for services, but in no event shall total fees, costs, and expenses exceed **§107,100.00**, without the express approval of the Board.
- 5. **Expenses**. District shall not be liable to Consultant for any costs or expenses paid or incurred by Consultant in performing services for District, other than as proved in Attachment "A."
- 6. Independent Consultant. Consultant, in the performance of this Agreement, shall be and act as an independent Consultant. Consultant understands and agrees that he/she and all of his/her 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.
- 7. Materials. Consultant shall furnish, at his/her own expense, all labor, materials, equipment,

supplies and other items necessary to complete the services to be provided pursuant to this Agreement.

- 8. **Standard of Care**. Consultant's services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of his/her profession for services to California school districts.
- 9. **Originality of Services**. 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.
- 10. **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. Consultant consents to use of Consultant's name in conjunction with the sale, use, performance and distribution of the matters, for any purpose and in any mcdium.
- 11. 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.

#### 12. Termination.

- 12.1. Without Cause 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 days after the day of mailing, whichever is sooner. In the event that District terminates this Agreement pursuant to this section, District shall compensate Consultant for work completed to date as a prorata amount of the full fees, costs, and expenses.
- 12.2. Without Cause by Consultant. Consultant may, upon thirty (30) 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 thirty (30) 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 costs to the District exceeds the cost of providing the service 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:** CONSULTANT agrees to hold harmless, indemnify, and defend OUSD and its officers, agents, and employees from:
  - 13.1. 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. CONSULTANT 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, Consultant, or subConsultant furnishing work, services, or materials to CONSULTANT in connection with the performance of this Agreement. This provision survives termination of this Agreement ;
  - 13.2. CONSULTANT shall indemnify, defend, and hold District, its directors, officers, agents, employees and representatives harmless from and against all claims, demands and judgments of any description arising out of or alleged to have arisen out of performance or nonperformance of the services under this Agreement to the extent

that such claims, demands and judgments are the result of any error, omission or negligent act of CONSULTANT or any person employed or agent engaged by CONSULTANT.

13.3. CONSULTANT shall place in its sub contracting / sub-consulting agreements and cause its sub-Consultants / sub-CONSULTANTs to agree to indemnities, defense and insurance obligations in the exact form and substance of those contained herein, each naming the District as an additional beneficiary or insured.

#### 14. Insurance.

- 14.1. The Consultant shall procure and maintain at all times it performs any portion of the Services the following insurance:
  - 14.1.1. General Liability. Two Million Dollars (\$2,000,000) combined single limit per occurrence for bodily injury, personal injury and property damage in the form of Comprehensive General Liability and Contractual Liability. If Commercial General Liability or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to each project/location or the general aggregate limit shall be twice the required occurrence limit.
  - 14.1.2. Automobile Liability Insurance. Automobile Liability Insurance, Occurrence Form, that shall protect the Consultant the District from all claims of bodily injury, property damage, personal injury, death, and medical payments arising performing any portion of the Services by Consultant.
  - 14.1.3. Workers' Compensation and Employers' Liability Insurance. For all of the Consultant's employees who are subject to this Agreement and to the extent required by the applicable state or federal law, Consultant shall keep in full force and effect, a Workers' Compensation policy. That policy shall provide employers' liability coverage with minimum liability coverage of One Million Dollars (\$1,000,000) per accident for bodily injury or disease. Consultant shall provide an endorsement that the insurer waives the right of subrogation against the District and its respective elected officials, officers, employees, agents, representatives, consultants, trustees, and volunteers.
  - 14.1.4. **Other Insurance Provisions**: The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

a. The District, its representatives, consultants, trustees, officers, officials, employees, agents, and volunteers ("Additional Insureds") are to be covered as additional insureds as respects liability arising out of activities performed by or on behalf of the Consultant; instruments of Service and completed operations of the Consultant; premises owned, occupied or used by the Consultant; or automobiles owned, leased, hired or borrowed by the Consultant. The coverage shall contain no special limitations on the scope of protection afforded to the Additional Insureds.

b. For any claims related to the projects, the Consultant's insurance

coverage shall be primary insurance as respects the Additional Insureds. Any insurance or self-insurance maintained by the Additional Insureds shall be in excess of the Consultant's insurance and shall not contribute with it.

c. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the Additional Insureds.

d. The Consultant's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

e. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the District.

f. Consultant shall furnish the District with Certificates of insurance showing maintenance of the required insurance coverage and original endorsements affecting general liability and automobile liability coverage. The endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. All endorsements are to be received and approved by the District before Work commence.

- 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 rules and regulations of the governing board of the District and all 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 Work as indicated or specified. If Consultant observes that any of the Work required by this Contract is 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 Work shall be made and this Contract shall be appropriately amended in writing, or this Contract shall be terminated effective upon Consultant's receipt of a written termination notice from the District. If Consultant performs any work that is in violation of any laws, ordinances, rules or regulations, without first notifying the District of the violation, Consultant shall be arall costs arising therefrom.
- 17. **Permits/Licenses**. Consultant and all Consultant's employees or agents shall secure and maintain in force such permits and licenses 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. 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, color, ancestry, national origin, religious creed, physical disability, medical condition, marital status, sexual orientation, gender, or age 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.

- 20. Fingerprinting of Employees. It is not contemplated at the time of execution of this Agreement that Consultant or its employees will have contact with students during the provision of services under this Agreement. If, at a future time, Consultant will have contact with any pupils, Consultant shall comply with the provisions of Education Code section 45125.1 regarding the submission of employee fingerprints to the California Department of Justice and the completion of criminal background investigations of its employees. The Consultant shall not permit any employee to have any contact with District pupils until such time as the Consultant has verified in writing to the governing board of the District that the employee has not been convicted of a felony, as defined in Education Code section 45122.1. The Consultant's responsibility shall extend to all employees, subConsultants, agents, and employees or agents of subConsultants regardless of whether those individuals are paid or unpaid, concurrently employed by the District, or acting as independent Consultants of the Consultant. Verification of compliance with this section and the Criminal Background Investigation Certification that may be required with this Agreement, shall be provided in writing to the District prior to each individual's commencement of employment or performing any portion of the Services and prior to permitting contact with any student.
- 21. District's Evaluation of Consultant and Consultant's Employees and/or SubConsultants. The District may evaluate the Consultant in any manner which is permissible under the law. The District's evaluation may include, without limitation:
  - 21.1. Requesting that District employee(s) evaluate the Consultant and the Consultant's employees and subConsultants and each of their performance.
  - 21.2. Announced and unannounced observance of Consultant, Consultant's employee(s), and/or subConsultant(s).
- 22. 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.
- 23. **Confidentiality**. The Consultant and all Consultant's agents, personnel, employee(s), and/or subConsultant(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.

24. 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:

#### **District**

<u>Consultant</u>

Timothy E. White Assistant Superintendent Facilities, Planning and Management 955 High Street Oakland, CA 94601 510-535-7079 Jason Zalinski Inspector of Record 2601 San Pablo Avenue Oakland, CA 94612

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.

- **25.** 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 Alameda County, California.
- **26.** 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.
- **27. 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.
- **28.** Incorporation of Recitals and Exhibits. The Recitals and each exhibit attached hereto are hereby incorporated herein by reference.

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

Date: .2012 By: R. Zalink Print Name: Its:

#### **OAKLAND UNIFIED SCHOOL DISTRICT**

By: Jody London, President, Board of Education

Date:

By:

Date: Edgar Rakestraw, Jr., Board Secretary

By:

By:

Date:

Timothy E. White, Associate Superintendent **Facilities Planning and Management** 

MAN

Date: 2.9.12

Cate Boskoff, Facilities Legal Counsel

File ID Number: 12-0542 Introduction Date: 2-22-12 Enactment Number: 12-08 Enactment Date: 2-22-13 By: 22

#### **Information regarding Consultant:**

Consultant:	Jason R Zalmakl
License No.:	558 -92 - 9224
Address:	2601 San pablo AU-e Oglelomol Ca, 94612
Telephone:	259-652 .9453
Facsimile:	209 862.2666
E-Mail:	Jason & Zalinski & Gmillion
Partnersh Limited H Corporati	l prietorship

Employer Identification and/or Social Security Number

NOTE: Title 26, Code of Federal Regulations, sections 6041 and 6209, require non-corporate recipients of \$600.00 or more to furnish their taxpayer identification number to the payer. The regulations also provide that a penalty may be imposed for failure to furnish the taxpayer identification number. In order to comply with these regulations, the District requires your federal tax identification number or Social Security number, whichever is applicable.

#### Attachment A

### **Scope of Services**

The scope of the project is to provide Division of State Architect (DSA) Inspection for the Arroyo Viejo CDC Renovation Project.

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XXXXXXX Oakland Unified School Distric Dept.of Facil.Plan.& Mngmt. Timethy P. White, Last Cont.				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.					
Timothy E. White, Asst.Spr. 955 High Street Oakland CA 94601					AUTHORIZED REPRESENTATIVE				

ACORD 25 (2009/09)

The ACORD name and logs are registered marks of ACORD

## INDEPENDENT CONSULTANT AGREEMENT ROUTING FORM

				Project	Information				
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	Division Head			Charles Love Phone			535-7081	Fax 510-535-7082	
1	Capital Program Contract & Accounting Manager								
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	Signature	O	Jun		1		roved	2-8-12	
		I. Departmer	t of Facilities F	Planning and Man	agement				
2.	General Counsel, Department of Facilities Planning and Management								
-	Signature MM					Date App	Date Approved 2.9.12		12
	Associate Superintendent, Facilities Planning and Management								
3.			TET	ing und indingeni		Data Arr	royod		
5.	Signature	-	(1)			Date App	bioved	-101,	
	President, Boar	d of Educatio	on						
4.	Signature					Date App	proved		

THIS FORM IS NOT A CONTRACT