

Board Office Use: Legislative File Info.	
File ID Number	14-0729
Introduction Date	5/28/14
Enactment Number	14-0866
Enactment Date	5/28/14



OAKLAND UNIFIED  
SCHOOL DISTRICT

Community Schools, Thriving Students

# Memo

To Board of Education  
Gary Yee Ed.D., Superintendent

From By: Maria Santos, Deputy Superintendent, Instruction, Leadership & Equity-in-Action ~~YEX~~  
Vernon Hal, Deputy Superintendent, Business & Operations

Board Meeting Date \_\_\_\_\_  
(To be completed by  
Procurement)

Subject Professional Services Contract Amendment - 1  
Linda Orear Orinda CA (Contractor, City/State) -  
State & Federal Programs (950) for St. Leo the Great School (73 (site/department)

**Action Requested** Ratification by the Governing Board of the amendment to the professional services contract between the District and Linda Orear. Services to be primarily provided to State & Federal Programs (950) for St. Leo the for the period of 09/30/2013 through 06/30/2014, in an amount not to exceed \$ 8,977.00.

**Background**  
*A one paragraph explanation of why an amendment is needed.*

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

**Discussion**  
*One paragraph summary of the amended scope of work.*

The consultant will provide professional development services for school site instructional and administrative staff. The consultant will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve student academic achievement in curriculum areas of Reading Language Arts, Reading, and/or Mathematics.

**Recommendation** Ratification by the Governing Board of the amendment to the professional services contract between the District and Linda Orear. Services to be primarily provided to State & Federal Programs (950) for St. Leo the for the period of 09/30/2013 through 06/30/2014, in an amount not to exceed \$ 8,977.00.

**Fiscal Impact** Funding resource name (please spell out) Title IIA  
not to exceed \$8,977.00

**Attachments**

- Contract Amendment
- Copy of original contract

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OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

**AMENDMENT NO. 1  
TO PROFESSIONAL SERVICES CONTRACT**

This Amendment is entered into between the Oakland Unified School District (OUSD) and Linda Orear (CONTRACTOR). OUSD entered into an Agreement with CONTRACTOR for services on 09/30 /, 2013, and the parties agree to amend that Agreement as follows:

1. **Services:**  The scope of work has changed.  ONLY the funding source has changed.  
**If the scope of work has changed:** Provide brief description of revised scope of work including a measurable description of expected final results, such as services, materials, products, and/or reports; attach additional pages as necessary.  
 Revised scope of work attached. **OR.** The CONTRACTOR agrees to provide the following amended services:

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2. **Terms (duration):**  The term of the contract is unchanged.  The term of the contract has changed.  
**If the term has changed:** The contract term is extended by an additional \_\_\_\_\_ (days/weeks/months), and the amended expiration date is \_\_\_\_\_.

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3. **Compensation:**  The contract price is unchanged.  The contract price has changed.  
**If the compensation has changed:** The contract price is amended by  
 Increase of \$ 8,977.00 to original contract amount  
 Decrease of \$ \_\_\_\_\_ to original contract amount  
and the new contract total is Fifteen Thousand, Two Hundred Seventy-Five dollars (\$ 15,275.00 )

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 Agreement is not effective and no payment shall be made to Contractor until it is approved. Approval requires signature by the State Administrator, the Board of Education, and/or the Interim Superintendent as their designee.

OAKLAND UNIFIED SCHOOL DISTRICT

[Signature]  
 President, Board of Education  
 Superintendent or Designee  
[Signature]  
Edgar Rakestraw, Jr., Secretary  
Board of Education

3/21/14  
Date  
5/29/14  
Date

CONTRACTOR

[Signature] 3/19/14  
Contractor Signature Date  
Linda Orear, Consultant  
Print Name, Title

EXHIBIT "A" Scope of Work

DESCRIPTION OF SERVICES TO BE PERFORMED BY CONTRACTOR

CONTRACTOR's entire Proposal is not made part of this Agreement. [IF A CONTRACTOR PROVIDES AN ACCEPTABLE DESCRIPTION OF SERVICES AS PART OF A PROPOSAL, THAT DESCRIPTION OF SERVICES CAN BE ATTACHED WITHOUT ANY TERMS, CONDITIONS, LIMITATIONS, ETC., FROM THAT PROPOSAL.]

Summary for Board Memo and Board Agenda – Must accurately align with scope of work below.

The consultant will provide professional development services for school site instructional and administrative staff. The consultant will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve student academic achievement in curriculum areas of Reading Language Arts, Reading, and/or Mathematics.

SCOPE OF WORK

Linda Orear will provide a maximum of 191.00 hours of services at a rate of \$ 47.00 per hour for a total not to exceed \$8,977.00. Services are anticipated to begin on 09/30/2013 and end on 06/30/2014.

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

The consultant will provide professional development services for school site instructional and administrative staff. The consultant will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve student academic achievement in curriculum areas of Reading Language Arts, Reading, and/or Mathematics.

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

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

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

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

**4. Alignment with Single Plan for Student Achievement (required if using State or Federal Funds)**

Please select:

**Action Item included in Board Approved SPSA (no additional documentation required)** – Action Item Number: \_\_\_\_\_

**Action Item added as modification to Board Approved SPSA** – Submit the following documents to the Resource Manager either electronically via email of scanned documents, fax or drop off.

1. Relevant page of SPSA with action item highlighted. Page must include header with the word "Modified", modification date, school site name, both principal and school site council chair initials and date.
  2. Meeting announcement for meeting in which the SPSA modification was approved.
  3. Minutes for meeting in which the SPSA modification was approved indicating approval of the modification.
  4. Sign-in sheet for meeting in which the SPSA modification was approved.
-

# Scope of Work AMENDMENT #1 2013-2014

**Contractor Name:** Linda W. Orear

**School Name:** Saint Leo the Great

Consultant will provide a maximum of 134 hours of service at the rate of \$47.00 per hour for a total not to exceed \$ 6,298.00.

**MODIFICATION: The consultant will provide an additional 191 hours of service at the rate of \$47.00 per hour for a new contract total not to exceed \$15,275.00**

## **Nature of Work:**

The Consultant will provide professional development services for the school site instructional and administrative staff. The consultant will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve the student academic achievement in curriculum areas of Reading, Language Arts, Mathematics and /or Science and Social Studies.

## **Provide professional development program with focus on:**

- Assist all teachers with classroom management methods.
- Strategies for new teachers in the areas of communicating and conferencing with parents.
- Instructional strategies and techniques the areas of organization of time and materials.
- Strategies in the areas of lesson plans and curriculum mapping
- Using assessment data to improve instruction.

## **Program will include:**

- Classroom observations and coaching sessions with follow-up conferences.
- Presentations at staff meetings
- Small group work with selected teachers.

## **Deliverables:**

- Provide information and guidance for implementing curriculum mapping
- Provide information and guidance for implementing effective classroom management practices.
- Provide information and guidance for improvement of instructional practices Provide information and guidance for improving communication skills
- Meet with the Principal to discuss professional development programs.
- Provide individual teachers with ongoing training and support (as needed)

## **Goals:**

Teachers gain a better understanding of effective instructional program

- Classroom management
- Curriculum mapping
- Use of data to design instruction
- Use of effective strategies and techniques



**AMENDMENT ROUTING FORM**

**2013-2014**

**PROFESSIONAL SERVICES CONTRACT AMENDMENT No. 1**

**Directions**

**Services beyond the original contract cannot be provided until the amendment has been fully approved and the Purchase Order amount has been increased by Procurement.**

- Contractor and OUSD contract originator reach agreement on modification to original Scope of Work.
- Insert the amendment number (i.e. if this is the first amendment enter "1," second enter "2," etc.) at the top of the amendment.
- If contract total amount has increased, the scope of work has changed. OUSD contract originator **creates new requisition with the original PO number referenced in the item description.**
- OUSD contract originator submits amendment packet to Procurement for approval within two weeks of creating the requisition.

**When the contract amendment is approved Procurement will add additional funds to the original Purchase Order.**

**Attachment Checklist**

- Contract amendment packet including Board Memo and Amendment Form
- Amended Scope of work (Be specific as to what additional work is being done by this consultant.)
- A Board Approved copy of the original contract and any prior Amendments.

**OUSD Staff Contact** Emails about this contract should be sent to: (Required) mildred.otis@ousd.k12.ca.us

**Contractor Information**

Contractor Name	Linda Orear	Agency's Contact	Self				
OUSD Vendor ID #	i005306	Title	Consultant				
Street Address	237 Overhill Road	City	Orinda	State	CA	Zip	94563
Telephone	(925) 254-7351	Email	lorear@cso.org				

**Compensation and Terms – Must be within the OUSD Billing Guidelines**

Original Contract Amount	\$ 6,298.00	Original PO Number	P1402850			
Amended Amount	\$ 8,977.00	New Requisition #	R0410195			
New Total Contract Amount	\$ 15,275.00	Start Date	09/30/2013	End Date	06/30/2014	
Pay Rate Per Hour (Required)	47.00	Number of Hours (Required)	191.00			

**Budget Information**

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

Resource #	Resource Name	Org Key	Object Code	Amount
4035	Title IIA	7354851204	5825	\$ 8,977.00
			5825	\$
			5825	\$

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

Additional services above original contract amount cannot be provided before the amendment is fully approved and the Purchase Order amount has been increased by Procurement.

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

1.	<b>Site Administrator or Manager</b>	Name	Mildred Otis	Phone	5108791053	Fax	
	Site / Department	State & Federal Programs (950) for St. Leo the Great School (735)					
	Signature					Date Approved	3-19-14
2.	<b>Resource Manager</b> , if using funds managed by:	<input checked="" type="checkbox"/> State and Federal <input type="checkbox"/> Quality, Community, School Development <input type="checkbox"/> Family, Schools, and Community Partnerships					
	Signature					Date Approved	3/20/14
	Signature					Date Approved	
3.	<b>Regional or Executive Officer</b>						
	Signature					Date Approved	3/21/14
4.	<b>Deputy Superintendent Instructional Leadership / Deputy Superintendent Business Operations</b>	Consultant Aggregate Under <input type="checkbox"/> , Over <input type="checkbox"/> \$50,000					
	Signature					Date Approved	
5.	<b>Superintendent or Board of Education</b>	Signature on the legal contract					
<b>Legal Required if not using standard contract</b>		Approved		Denied - Reason		Date	
<b>Procurement</b>	Date Received			PO Number	P1402850		





**PURCHASE ORDER  
OAKLAND UNIFIED SCHOOL DISTRICT**

PURCHASING DEPARTMENT  
900 HIGH STREET OAKLAND, CALIFORNIA 94601  
FAX: (510) 879-1857

**PURCHASE ORDER NO.**

P1402850

R0405912

**ORDER MUST BE RECEIVED IN OAKLAND USD WAREHOUSE BY  
06/30/14 , OR ORDER WILL BE RETURNED TO VENDOR AT  
VENDOR'S EXPENSE**

\* SHOW PURCHASE ORDER NUMBER AND ITEM NUMBER ON ALL CORRESPONDENCE, INVOICES, AND PACKAGES.  
\* ALL GOODS AND SERVICES MUST BE AS SPECIFIED. DO NOT SUBSTITUTE.  
\* MAIL INVOICE IN DUPLICATE TO: OAKLAND UNIFIED SCHOOL DISTRICT

**PAYMENT CANNOT BE GUARANTEED IF SHIPPED TO ADDRESS  
OTHER THAN BELOW. FOR PROMPT PAYEMENT, ITEMS ON  
INVOICE MUST BE IN SAME SEQUENCE AS ITEMS ON PURCHASE**

**VENDOR:**

ACCOUNTS PAYABLE  
1025 - 2ND AVENUE  
OAKLAND, CA 94608

**SHIP TO:**

PROCUREMENT & DISTRIBUTION DEPARTME  
900 HIGH STREET  
OAKLAND CA 94601  
PHONE: (510) 434-2235  
FAX: (510) 434-2249  
SITE CONTACT: Patterson, Danielle

I005306  
LINDA W. OREAR  
237 OVERHILL ROAD  
ORINDA CA 94563

ML (925) 254-7351

Del  
Date

Bid  
Quote#

Item No.	Quantity	Unit	Description of Articles or Services	Unit Price	Total Price
001	6,298	EA	Ratification of professional services contract between Linda Orear and OUSD for Title IIA services provided to St. Leo the Great School-735 from 09/30/2013 to 6/30/2014 amount not to exceed \$6298.00 (Six Thousand Two Hundred, Ninety-Eight Dollars). The consultant will provide professional development services for school site instructional and administrative staff. The consultant will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve student academic achievement in curriculum areas of Reading Language Arts, Reading, and/or Mathematics.	1.00	6,298.00
002	8,977	EA	Amendment No. 1	1.00	8,977.00
<b>NET TOTAL ....</b>					<b>15,275.00</b>

**NOTICE TO VENDORS:**

Vendor agrees, by supplying the product(s) and/or service(s) requested in this purchase order, to defend, indemnify and hold harmless the District, its Board of Education, officers, employees, agents from any and all losses or injuries, however caused, resulting from any defects in, or delivery of, the product(s) supplied, or negligence in providing the service(s).

**AFFIRMATIVE ACTION:**

The seller shall not discriminate against any employee or applicant for employment because of race, creed, sex, non-impairing handicap, color, or national origin and shall ensure compliance with all provisions of Executive Order No. 11246 (as amended by Executive Order No. 11375). Failure to comply shall be considered cause for not requesting bids from that firm, until it complies with the above provision.

**Buyer Name:** BRENDA LEWIS

**Buyer Phone#:** (510) 434-2247

*Brenda Lewis*

DIRECTOR OR DESIGNEE OF PURCHASING

DATE

Board Office Use: Legislative File Info.	
File ID Number	14-0134
Introduction Date	2/26/2014
Enactment Number	14-0296
Enactment Date	2-26-14



**OAKLAND UNIFIED  
SCHOOL DISTRICT**

Community Schools, Thriving Students

# Memo

To The Board of Education  
 From Gary Yee, Ph.D., Superintendent  
 By: Maria Santos, Deputy Superintendent, Instruction, Leadership & Equity-in-Action  
 Vernon Hal, Deputy Superintendent, Business & Operations

Board Meeting Date  
 (To be completed by Procurement) 2-26-14

Subject Professional Services Contract -  
 Linda Orear Orinda CA (contractor, City State)  
 950-State & Federal Programs for 735 - St Leo the Great School (site/department)

Action Requested Ratification of a professional services contract between Oakland Unified School District and Linda Orear Orinda CA. Services to be primarily provided to 950-State & Federal Programs for 735 - St Leo the Great School for the period of 09/30/2013 through 06/30/2014.

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

*A one paragraph explanation of why the consultant's services are needed.*

Discussion The consultant will provide professional development services for school site instructional and administrative staff. The consultant will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve student academic achievement in curriculum areas of Reading Language Arts, Reading, and/or Mathematics.

*One paragraph summary of the scope of work.*

Recommendation Ratification of professional services contract between Oakland Unified School District and Linda Orear Orinda CA. Services to be primarily provided to 950-State & Federal Programs for 735 - St Leo the Great School for the period of 09/30/2013 through 06/30/2014.

Fiscal Impact Funding resource name (please spell out) Title IIA  
 not to exceed \$6,298.00

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



Board Office Use: Legislative File Info.	
File ID Number	14-0134
Introduction Date	2/26/2014
Enactment Number	14-0296
Enactment Date	2-26-14



OAKLAND UNIFIED  
SCHOOL DISTRICT

## PROFESSIONAL SERVICES CONTRACT 2013-2014

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

- Services:** The CONTRACTOR shall provide the ("Services" or "Work") as described in **Exhibit "A,"** attached hereto and incorporated herein by reference.
- Terms:** CONTRACTOR shall commence work on 09/30/2013, or the day immediately following approval by the Superintendent if the aggregate amount CONTRACTOR has contracted with the District is below \$81,000 in the current fiscal year; or, approval by the Board of Education if the total contract(s) exceed \$81,000, whichever is later. The work shall be completed no later than 06/30/2014.
- Compensation:** OUSD agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this Agreement, a total fee not to exceed Six Thousand, Two Hundred Ninety-Eight Dollars (\$ 6,298.00 ). This sum shall be for full performance of this Agreement and includes all fees, costs, and expenses incurred by Contractor including, but not limited to, labor, materials, taxes, profit, overhead, travel, insurance, subcontractor costs, and other costs.

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

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

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

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

- Submittal of Documents:** CONTRACTOR shall not commence the Work under this Contract until CONTRACTOR has submitted and OUSD has approved evidence of the following:
  - Individual consultants:
    - Tuberculosis Clearance – Documentation from health care provider showing negative TB status within the last four years.
    - Completion of Pre-Consultant Screening Process – Attach letter from Human Resources Support Services showing completion of Pre-Consultant Screening for this current fiscal year.
    - Insurance Certificates and Endorsements – General Liability insurance in compliance with section 9 herein.
  - Agencies or organizations:
    - Insurance Certificates and Endorsements – Workers' Compensation insurance in compliance with section 9 herein.
- Equipment and Materials:** CONTRACTOR shall provide all equipment, materials, and supplies necessary for the performance of this Agreement *except:* N/A which shall not exceed a total cost of \$ 0.00.
- CONTRACTOR Qualifications / Performance of Services.**

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

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

- Notices:** All notices and invoices provided for under this Agreement shall be in writing and either personally delivered during normal business hours or sent by U.S. Mail (certified, return receipt requested) with postage prepaid to the other party at the address set forth below:

Professional Services Contract

**OUSD Representative:**

Name: Natoya Brice  
Site /Dept.: 950-State & Federal Programs for 735 - St Leo the Great School  
Address: 1000 Broadway Suite 450  
Oakland, CA 94607  
Phone: 510-879-1037

**CONTRACTOR:**

Name: Linda Orear Orinda CA  
Title: Consultant  
Address: 237 Overhill Road  
Orinda CA 94602  
Phone: 5925-254-7351

Notice shall be effective when received if personally served or, if mailed, three days after mailing. Either party must give written notice of a change of address. CONTRACTOR shall submit invoices in a form that includes the name of the person providing the service, the service performed, the date service was rendered, and the hours spent on the work.

**8. Invoicing**

Invoices furnished by CONTRACTOR under this Agreement must be in a form acceptable to OUSD. All amounts paid by OUSD shall be subject to audit by OUSD.

1. Invoices shall include, but not be limited to: Consultant name, consultant address, invoice date, invoice sequence number, purchase order number, name of school or department service was provided to, period of service, number of hours of service, brief description of services provided, hourly rate, total payment requested.
2. Invoices from Agencies or Organizations must include evidence of compliance with section 19 herein:
  - i. Fingerprinting of Employees and Agents: Agency or organization must provide a current list of all employees, agents and volunteers working at an OUSD site when invoicing, and must include the Department of Justice ATI number for each person, and at statement that subsequent arrest records have been requested for each person listed.
  - ii. Tuberculosis Screening: The list must also include a statement that TB Clearance is on file for each person.

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

**10. Insurance:**

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

Check one of the boxes below:

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

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

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

**OR**

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

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

Professional Services Contract

12. **Assignment:** The obligations of CONTRACTOR under this Agreement shall not be assigned by CONTRACTOR without the express prior written consent of OUSD.
13. **Anti-Discrimination.** It is the policy of OUSD 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 CONTRACTOR agrees to comply with applicable Federal and California laws including, but not limited to, the California Fair Employment and Housing Act beginning with Government Code Section 12900 and Labor Code Section 1735 and OUSD policy. In addition, the CONTRACTOR agrees to require like compliance by all its subcontractor(s). Contractor shall not engage in unlawful discrimination in employment on the basis of actual or perceived; race, color, national origin, ancestry, religion, age, marital status, pregnancy, physical or mental disability, medical condition, veteran status, gender, sex or sexual orientation.
14. **Drug-Free / Smoke Free Policy.** No drugs, alcohol, and/or smoking are allowed at any time in any buildings and/or grounds on OUSD property. No students, staff, visitors, CONTRACTORS, or subcontractors are to use drugs on these sites.
15. **Indemnification:** CONTRACTOR agrees to hold harmless, indemnify, and defend OUSD and its officers, agents, and employees from any and all claims or losses accruing or resulting from injury, damage, or death of any person, firm, or corporation in connection with the performance of this Agreement. CONTRACTOR also agrees to hold harmless, indemnify, and defend OUSD and its elective board, officers, agents, and employees from any and all claims or losses incurred by any supplier, contractor, or subcontractor furnishing work, services, or materials to CONTRACTOR in connection with the performance of this Agreement. This provision survives termination of this Agreement.
16. **Copyright/Trademark/Patent/Ownership.** CONTRACTOR understands and agrees that all matters produced under this Agreement shall become the property of OUSD and cannot be used without OUSD's express written permission. OUSD shall have all right, title and interest in said matters, including the right to secure and maintain the copyright, trademark, and/or patent of said matter in the name of OUSD. CONTRACTOR consents to use of CONTRACTOR's name in conjunction with the sale, use, performance and distribution of the matters, for any purpose and in any medium. These matters include, without limitation, drawings, plans, specifications, studies, reports, memoranda, computation sheets, the contents of computer diskettes, artwork, copy, posters, billboards, photographs, videotapes, audiotapes, systems designs, software, reports, diagrams, surveys, source codes or any other original works of authorship, or other documents prepared by CONTRACTOR or its Sub-CONTRACTORS in connection with the Services performed under this Agreement. All works shall be works for hire as defined under Title 17 of the United States Code, and all copyrights in those works are the property of OUSD.
17. **Waiver:** No delay or omission by either party in exercising any right under this Agreement shall operate as a waiver of that or any other right or prevent a similar subsequent act from constituting a violation of the Agreement.
18. **Termination:** OUSD may at any time terminate this Agreement upon written notice to CONTRACTOR. OUSD shall compensate CONTRACTOR for services satisfactorily provided through the date of termination. In addition, OUSD may terminate this Agreement for cause should CONTRACTOR fail to perform any part of this Agreement. In the event of termination for cause, OUSD may secure the required services from another contractor. If the cost to OUSD exceeds the cost of providing the services pursuant to this Agreement, CONTRACTOR shall pay the additional cost.
19. **Conduct of Consultant.** CONSULTANT will adhere to the following staff requirements and provide OUSD with evidence of staff qualifications, consistent with invoicing requirements outlined in Section 8, which include:
  1. **Tuberculosis Screening**
  2. **Fingerprinting of Employees and Agents.** The fingerprinting and criminal background investigation requirements of Education Code section 45125.1 apply to CONTRACTOR's services under this Agreement and CONTRACTOR certifies its compliance with these provisions as follows: "CONTRACTOR certifies that CONTRACTOR has complied with the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 with respect to all CONTRACTOR's employees, subcontractors, agents, and subcontractors' employees or agents ("Employees") regardless of whether those Employees are paid or unpaid, concurrently employed by OUSD, or acting as independent contractors of CONTRACTOR, who may have contact with OUSD pupils in the course of providing services pursuant to the Agreement, and the California Department of Justice has determined that none of those Employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. Contractor further certifies that it has received and reviewed fingerprint results for each of its Employees and Contractor has requested and reviews subsequent arrest records for all Employees who may come into contract with OUSD pupils in providing services to the District under this Agreement.

Contractor initial: 

In the event that OUSD, in its sole discretion, at any time during the term of this contract, desires the removal of any CONSULTANT related persons, employee, representative or agent from an OUSD school site and, or property, CONSULTANT shall immediately upon receiving notice from OUSD of such desire, cause the removal of such person or persons.

20. **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.
21. **OUSD's Evaluation of CONTRACTOR and CONTRACTOR's Employees and/or Subcontractors.** OUSD may evaluate the CONTRACTOR's work in any way that OUSD is entitled to do so pursuant to applicable law. The OUSD's evaluation may include, without limitation:
  1. Requesting that OUSD employee(s) evaluate the CONTRACTOR and the CONTRACTOR's employees and subcontractors and each of their performance.
  2. Announced and unannounced observance of CONTRACTOR, CONTRACTOR's employee(s), and/or subcontractor(s).

Professional Services Contract

- 22. **Limitation of OUSD Liability.** Other than as provided in this Agreement, OUSD's financial obligations under this Agreement shall be limited to the payment of the compensation provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event, shall OUSD be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of, or in connection with, this Agreement for the services performed in connection with this Agreement.
- 23. **Confidentiality.** The CONTRACTOR and all CONTRACTOR's agents, personnel, employee(s), and/or subcontractor(s) shall maintain the confidentiality of all information received in the course of performing the Services. CONTRACTOR understands that student records are confidential and agrees to comply with all state and federal laws concerning the maintenance and disclosure of student records. This requirement to maintain confidentiality shall extend beyond the termination of this Agreement. Contractors will be permitted access to student data only where permissible under state and federal law and only after executing OUSD's Confidentiality Agreement Regarding Student Data.
- 24. **Conflict of Interest.** CONTRACTOR shall abide by and be subject to all applicable OUSD policies, regulations, statutes or other laws regarding conflict of interest. CONTRACTOR shall not hire any officer or employee of OUSD to perform any service by this Agreement.  
  
CONTRACTOR affirms to the best of his/her/its knowledge, there exists no actual or potential conflict of interest between CONTRACTOR's family, business or financial interest and the services provided under this Agreement, and in the event of change in either private interest or services under this Agreement, any question regarding possible conflict of interest which may arise as a result of such change will be brought to OUSD's attention in writing.  
  
Through its execution of this Agreement, CONTRACTOR acknowledges that it is familiar with the provisions of section 1090 *et seq.* and section 87100 *et seq.* of the Government Code of the State of California, and certifies that it does not know of any facts which constitute a violation of said provisions. In the event CONTRACTOR receives any information subsequent to execution of this Agreement, which might constitute a violation of said provisions, CONTRACTOR agrees it shall notify OUSD in writing.
- 25. **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.
- 26. **Litigation:** This Agreement shall be performed in Oakland, California and is governed by the laws of the State of California. The Alameda County Superior Court shall have jurisdiction over any state court litigation initiated to enforce or interpret this Agreement. If litigation is initiated, the prevailing party shall be entitled to reasonable attorney's fees and costs.
- 27. **Contract Contingent on Governing Board Approval:** The District shall not be bound by the terms of this Agreement until it has been formally approved by the District's Governing Board, and no payment shall be owed or made to CONTRACTOR absent formal approval. This Agreement shall be deemed to be approved when it has been signed by the Board of Education, and/or the Superintendent as its designee.
- 28. **Signature Authority:** Each party has the full power and authority to enter into and perform this Agreement, and the person signing this Agreement on behalf of each Party has been given the proper authority and empowered to enter into this Agreement.
- 29. **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.
- 30. **Incorporation of Recitals and Exhibits:** The Recitals and each exhibit attached hereto are hereby incorporated herein by reference.
- 31. **Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion:** The prospective primary participant certifies to the best of its knowledge and belief, that it and its principals: Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency according to Federal Acquisition Regulation Subpart 9.4, and by signing this contract, certifies that this vendor does not appear on the Excluded Parties List. (<https://www.epls.gov/epls/search.do>)

**Summary of terms and compensation:**

Anticipated start date: 09/30/2013 Work shall be completed by: 06/30/2014 Total Fee: \$ 6,298.00

OAKLAND UNIFIED SCHOOL DISTRICT

[Signature]  
 President, Board of Education

Superintendent or Designee  
[Signature]  
Secretary, Board of Education

10/25/13  
Date

2-26-14  
Date

CONTRACTOR

[Signature]  
Contractor Signature

10/22/13  
Date

Linda W Orzear, Consultant  
Print Name, Title

File ID Number: 14-0134  
Introduction Date: 2-26-14  
Enactment Number: 14-0296  
Enactment Date: 2-26-14

EXHIBIT "A" Scope of Work

DESCRIPTION OF SERVICES TO BE PERFORMED BY CONTRACTOR

CONTRACTOR's entire Proposal is not made part of this Agreement. [IF A CONTRACTOR PROVIDES AN ACCEPTABLE DESCRIPTION OF SERVICES AS PART OF A PROPOSAL, THAT DESCRIPTION OF SERVICES CAN BE ATTACHED WITHOUT ANY TERMS, CONDITIONS, LIMITATIONS, ETC., FROM THAT PROPOSAL.]

Summary for Board Memo and Board Agenda – Must accurately align with scope of work below.

The consultant will provide professional development services for school site instructional and administrative staff. The consultant will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve student academic achievement in curriculum areas of Reading Language Arts, Reading, and/or Mathematics.

SCOPE OF WORK

Linda Orear Orinda CA will provide a maximum of 134 hours of services at a rate of \$47.00 per hour for a total not to exceed \$6,298.00. Services are anticipated to begin on 09/30/2013 and end on 06/30/2014.

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

Please See Attached Scope Of Work.

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

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

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

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

## **Scope of Work 2013 - 2014**

**Contractor Name:** Linda W. Orear

**School Name:** Saint Leo the Great

Consultant will provide a maximum of 134 hours of service at the rate \$47.00 per hour not to exceed \$6,298.00 (These hours are subject to modification with revised school allotments)

### **Nature of Work:**

The Consultant will provide professional development services for the school site instructional and administrative staff. The consultant will provide ongoing professional development services that will enable teachers to provide a more effective instructional program and improve the student academic achievement in curriculum areas of Reading, Language Arts, Mathematics and /or Science and Social Studies.

Provide professional development program with focus on:

- Assist all teachers with classroom management methods.
- Strategies for new teachers in the areas of communicating and conferencing with parents.
- Instructional strategies and techniques the areas of organization of time and materials.
- Strategies in the areas of lesson plans and curriculum mapping
- Using assessment data to improve instruction.

Program will include:

- Classroom observations and coaching sessions with follow-up conferences.
- Presentations at staff meetings
- Small group work with selected teachers
- Small group work with selected

### **Deliverables:**

Provide information and guidance for implementing curriculum mapping

- Provide information and guidance for implementing effective classroom management practices.
- Provide information and guidance for improvement of instructional practices  
Provide information and guidance for improving communication skills
- Meet with the Principal to discuss professional development programs.
- Provide individual teachers with ongoing training and support (as needed)

### **Goals:**

Teachers gain a better understanding of effective instructional program

1. Classroom management
2. Curriculum mapping
3. Use of data to design instruction
4. Use of effective strategies and techniques

# OAKLAND UNIFIED SCHOOL DISTRICT

## Private Schools Program

### Program Improvement Plan — Title II A

**School name: St. Leo the Great      Year: 2013-2014**

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

**Assessment:** *What are our areas of need with regard to supporting the professional development of teachers? How do these areas relate to student academic achievement? What is the supporting evidence?* (Evidence can include surveys, test results, Leadership Team input, etc.) As a result of the WCEA/WASC self-study, a need for major improvement of the school technology was identified. Stimulated by grant money and fundraising, the school set out to provide a viable 21<sup>st</sup> century environment for student learning. Interactive whiteboards, a new student computer lab were added and in 2012 mobile technology has been added to the school with a plan to add more. To support the successful implementation of the new technology, the administration recognizes that Professional Development of teachers is critical.

**Objectives:** *What do we need to do to support the development of our teachers through preparation and training?* Teachers will require support and training in the use of the Promethean Active boards, Apple iPod Touches, student laptops and related software, Web 2.0 tools, and best practice in the integration of technology throughout the curriculum.

**Action Steps:** *How will we achieve our objectives?* The service of a qualified technology Specialist/trainer Linda Orear is required on a regular basis to support the teaching staff in their efforts to facilitate student 21<sup>st</sup> century learning. In addition to training the staff in the use of the new technology, the specialist will support the principal in the implementation of the new technology plan.

**Evaluation:** *How will we know if our actions are effective? What is the supporting evidence?* Having access to update technology has brought a new excitement to the learning environment. Students are more engaged in their learning and teachers have more confidence in their lesson planning. Students and teachers collaborate, communicate, and design authentic, challenging lessons. There is no doubt that standardized test scores will document what the summative and formative assessment in the classroom is revealing — that students are learning!

**Planning for next year:** *What have we learned this year so we can provide a better program next year? (to be completed at the end of the school year)*

#### Remember

- > All plans must be approved by the OUSD Private Schools Administrator
- > Consultation must take place prior to any request for services
- > Contracts must be completed and approved before any services can begin
- > Modifications to the original approved plan can be submitted by fax or email

**4. Alignment with Single Plan for Student Achievement (required if using State or Federal Funds)**

Please select:

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





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
10/03/2013

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

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

PRODUCER 0726293 1-415-546-9300  
 Arthur J. Gallagher & Co.  
 Insurance Brokers of California, Inc., License #0726293  
 1225 Battery Street #450  
 San Francisco, CA 94111

CONTACT NAME:	
PHONE (A/C, No, Ext):	FAX (A/C, No):
E-MAIL ADDRESS:	
INSURER(S) AFFORDING COVERAGE	
INSURER A: WESTERN CATHOLIC INS CO RRG INC	NAIC # 14122
INSURER B: CHURCH MUT INS CO	18767
INSURER C:	
INSURER D:	
INSURER E:	
INSURER F:	

INSURED  
 Roman Catholic Bishop of Oakland, A Corporation Sole  
 2121 Harrison Street  
 Oakland, CA 94612

**COVERAGES**

CERTIFICATE NUMBER: 36219570

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/SUBR INSR	WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			WCGAL-005-13	07/01/13	07/01/14	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			WCGAL-005-13	07/01/13	07/01/14	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB EXCESS LIAB DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y/N	050005607535139	01/01/13	01/01/14	<input checked="" type="checkbox"/> WC STATUTORY LIMITS E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	E & O			WCGAL-005-13	07/01/13	07/01/14	Occurrence 10,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)  
 RE: Saint Leo the Great School, 4238 Howe Street, Oakland CA 94611. As respects Title I and Title II Consultants for 2013-2014 School Year. Name of Consultants Berverly Watkins and Linda Orear. It is understood and agreed that this insurance is primary and any other insurance maintained by the Certificate Holder shall be excess only and not contributing with this insurance.

**CERTIFICATE HOLDER**

Oakland Unified School District  
 and their officers, agents and employees  
 900 High Street  
 Oakland, CA 94606  
 USA

**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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ACORD 25 (2010/05)  
 algonzalez  
 36219570

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# PROFESSIONAL SERVICES CONTRACT ROUTING FORM 2013-2014

## Basic Directions

Additional directions and related documents are in the School Operations Library (<http://intranet.ousd.k12.ca.us>)

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

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

Attachment Checklist	<input checked="" type="checkbox"/> For individual consultants: HRSS Pre-Consultant Screening Letter for the current fiscal year.
	<input checked="" type="checkbox"/> For individual consultants: Proof of negative tuberculosis status within past 4 years.
	<input checked="" type="checkbox"/> For All Consultants: Results page of the Excluded Party List ( <a href="https://www.sam.gov/portal/public/SAM/">https://www.sam.gov/portal/public/SAM/</a> )
	<input checked="" type="checkbox"/> For All Consultants: Statement of qualifications (organization); or resume (individual consultant).
	<input checked="" type="checkbox"/> For All Consultants: Proof of Commercial General Liability insurance naming OUSD as an Additional Insured.
	<input checked="" type="checkbox"/> For All Consultants with employees: Proof of Workers' Compensation Insurance. (Ref. to Section 10 of the Contract)

**OUSD Staff Contact** Emails about this contract should be sent to. (required) Natoya.Brice@ousd.k12.ca.us

## Contractor Information

Contractor Name	Linda Orear	Agency's Contact	Self			
OUSD Vendor ID #	i005306	Title	Consultant			
Street Address	237 Overhill Road	City	Orinda	State	CA	Zip 94563
Telephone	925-254-7351	Email (required)	lorear@csdo.org			
Contractor History	Previously been an OUSD contractor? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			

## Compensation and Terms - Must be within the OUSD Billing Guidelines

Anticipated start date	09/30/2013	Date work will end	06/30/2014	Other Expenses	\$
Pay Rate Per Hour (required)	\$47.00	Number of Hours (required)	134		

## Budget Information

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

Resource #	Resource Name	Org Key	Object Code	Amount
4035	Title IIA	7354851204	5825	\$ 6,298.00
			5825	\$
			5825	\$0

Requisition No. (required) R0405912 Total Contract Amount \$6,298.00

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

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

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

1.	<b>Administrator / Manager</b> (Originator)	Name	Natoya Brice	Phone	510-879-1037	
	Site / Department	950-State & Federal Programs for 735 - St Leo the Great School			Fax	N/A
	Signature				Date Approved	10/25/13
2.	<b>Resource Manager</b> (if using funds managed by: <input checked="" type="checkbox"/> State and Federal <input type="checkbox"/> Quality, Community, School Development <input type="checkbox"/> Family, Schools, and Community Partnerships)	<input checked="" type="checkbox"/> Scope of work indicates compliant use of restricted resource and is in alignment with school site plan (SPSA)				
	Signature				Date Approved	10/25/13
	Signature (if using multiple restricted resources)				Date Approved	
3.	<b>Regional Executive Officer</b>	<input type="checkbox"/> Services described in the scope of work align with needs of department or school site				
	<input checked="" type="checkbox"/> Consultant is qualified to provide services described in the scope of work		Signature		Date Approved	10/25/13
4.	<b>Deputy Superintendent Instructional Leadership / Deputy Superintendent Business Operations</b>	Consultant Aggregate Under <input checked="" type="checkbox"/> Over \$50,000				
	Signature				Date Approved	10/25/13
5.	<b>Superintendent, Board of Education</b> Signature on the legal contract					
Legal	Required if not using standard contract	Approved	Denied - Reason	Date		
Procurement	Date Received	PO Number		P1402850		