

Board Office Use: Legislative File Info.	
File ID Number	15-0075
Introduction Date	3-11-15
Enactment Number	15-0301
Enactment Date	3/11/15 02



OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

Memo

To Board of Education
From Antwan Wilson, Superintendent

Board Meeting Date
(To be completed by Procurement) 3/11/15

Subject Professional Services Contract - Hatchuel Tabernik & Associates Inc.
 - Linked Learning Office (912) (site/department)

Action Requested Ratification of professional services contract between Oakland Unified School District and Hatchuel Tabernik & Associates Inc.. Services to be primarily provided to Linked Learning Office (912) for the period of July 1, 2014 through June 30, 2015.

Background
A one paragraph explanation of why the consultant's services are needed.
 HTA proposes to consult with Oakland Unified School District on the Investing in Innovations (i3) research grant ("Oakland Accelerates") funded by a four-year Department of Education federal grant. This is the third year of a four-year evaluation and research study.

Discussion
One paragraph summary of the scope of work.
 HTA will produce an interim evaluation report summarizing findings from the first two years of the program implementation (2012-2014). Formative and baseline outcome data will be analyzed and synthesized for the report. HTA will continue to collect and analyze data relevant to the final i3 evaluation report. HTA will create an analysis plan to guide Oakland Unified School District's reporting for the required 2014 Annual Performance Report (APR).

Recommendation Ratification of professional services contract between Oakland Unified School District and Hatchuel Tabernik & Associates Inc.. Services to be primarily provided to Linked Learning Office (912) for the period of July 1, 2014 through June 30, 2015.

Fiscal Impact Funding resource name (please spell out) Investing in Innovations (i3)
 not to exceed 70,000.00

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

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OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

PROFESSIONAL SERVICES CONTRACT 2014-2015

This Agreement is entered into between Hatchuel Tabernik & Associates Inc.

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

1. **Services:** CONTRACTOR shall provide the ("Services" or "Work") as described in **Exhibit "A,"** attached hereto and incorporated herein by reference.
2. **Terms:** CONTRACTOR shall commence work on July 1, 2014, or the day immediately following approval by the Superintendent if the aggregate amount CONTRACTOR has contracted with the District is below \$ 84,100 in the current fiscal year; or, approval by the Board of Education if the total contract(s) exceed \$ 84,100, whichever is later. The work shall be completed no later than June 30, 2015.
3. **Compensation:** OUSD agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this Agreement. The compensation under this Contract shall not exceed Seventy Thousand Dollars (70,000.00) [per fiscal year], at an hourly billing rate not to exceed _____ per hour. This sum shall be for full performance of this Agreement and includes all fees, costs, and expenses incurred by Contractor including, but not limited to, labor, materials, taxes, profit, overhead, travel, insurance, subcontractor costs, and other costs.

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

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

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

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

4. **Equipment and Materials:** CONTRACTOR shall provide all equipment, materials, and supplies necessary for the performance of this Agreement *except:* _____ which shall not exceed a total cost of _____.
5. **CONTRACTOR Qualifications / Performance of Services:**
CONTRACTOR Qualifications: CONTRACTOR warrants it is specially trained, experienced, competent and fully licensed to provide the Services required by this Agreement in conformity with the laws and regulations of the State of California, the United States of America, and all local laws, ordinances and/or regulations, as they may apply.
Standard of Care: CONTRACTOR warrants that CONTRACTOR has the qualifications and ability to perform the Services in a professional manner, without the advice, control, or supervision of OUSD. CONTRACTOR's services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of its profession for services to California school districts.
6. **Invoicing:** Invoices furnished by CONTRACTOR under this Agreement must be in a form acceptable to OUSD. All amounts paid by OUSD shall be subject to audit by OUSD. Invoices shall include, but not be limited to: Contractor name, Contractor address, invoice date, invoice number, purchase order number, name of school or department service was provided to, period of service, name of the person performing the service, date service was rendered, brief description of services provided, number of hours of service, hourly rate, total payment requested.
7. **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: Gretchen Livesey
Site /Dept.: Linked Learning Office (912)
Address: 2607 Myrtle Street, Room 104
Oakland, CA 94607
Phone: 510 273-2373
Email: cynthia.slater@ousd.k12.ca.us

CONTRACTOR:

Name: Tim Tabernik
Title: President
Address: 2560 9th Street, Suite 211
Berkeley CA 94710
Phone: 510 559-3193
Email: rlobar@htaconsulting.com

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

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

9. **Insurance:**

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

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

Check one of the boxes below:

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

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

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

OR

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

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

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

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

13. **Drug-Free / Smoke Free Policy:** No drugs, alcohol, and/or smoking are allowed at any time in any buildings and/or grounds on OUSD property. No students, staff, visitors, CONTRACTORS, or subcontractors are to use controlled substances, alcohol or tobacco on these sites.
14. **Indemnification:** CONTRACTOR agrees to hold harmless, indemnify, and defend OUSD and its officers, agents, and employees from any and all claims or losses accruing or resulting from injury, damage, or death of any person, firm, or corporation in connection with the performance of this Agreement. CONTRACTOR also agrees to hold harmless, indemnify, and defend OUSD and its elective board, officers, agents, and employees from any and all claims or losses incurred by any supplier, contractor, or subcontractor furnishing work, services, or materials to CONTRACTOR in connection with the performance of this Agreement. This provision survives termination of this Agreement.
15. **Copyright/Trademark/Patent/Ownership:** CONTRACTOR understands and agrees that all matters produced under this Agreement shall become the property of OUSD and cannot be used without OUSD's express written permission. OUSD shall have all right, title and interest in said matters, including the right to secure and maintain the copyright, trademark, and/or patent of said matter in the name of OUSD. CONTRACTOR consents to use of CONTRACTOR's name in conjunction with the sale, use, performance and distribution of the matters, for any purpose and in any medium. These matters include, without limitation, drawings, plans, specifications, studies, reports, memoranda, computation sheets, the contents of computer diskettes, artwork, copy, posters, billboards, photographs, videotapes, audiotapes, systems designs, software, reports, diagrams, surveys, source codes or any other original works of authorship, or other documents prepared by CONTRACTOR or its Sub-CONTRACTORS in connection with the Services performed under this Agreement. All works shall be works for hire as defined under Title 17 of the United States Code, and all copyrights in those works are the property of OUSD.
16. **Waiver:** No delay or omission by either party in exercising any right under this Agreement shall operate as a waiver of that or any other right or prevent a similar subsequent act from constituting a violation of the Agreement.
17. **Termination:** OUSD may at any time terminate this Agreement upon 30 days prior written notice to CONTRACTOR. OUSD shall compensate CONTRACTOR for services satisfactorily provided through the date of termination. In addition, OUSD may terminate this Agreement for cause should CONTRACTOR fail to perform any part of this Agreement. In the event of termination for cause, OUSD may secure the required services from another contractor. If the cost to OUSD exceeds the cost of providing the services pursuant to this Agreement, CONTRACTOR shall pay the additional cost.
18. **Conduct of CONTRACTOR:** By signing this Agreement, CONTRACTOR certifies compliance with the following requirements and will provide OUSD with evidence of staff qualifications, which include:
 1. **Tuberculosis Screening:** CONTRACTOR is required to screen employees who will be working at OUSD sites for more than six hours. CONTRACTOR affirms that each employee has current proof of negative TB testing on file and TB results are monitored.
 2. **Fingerprinting of Employees and Agents.** The fingerprinting and criminal background investigation requirements of Education Code section 45125.1 apply to CONTRACTOR's services under this Agreement and CONTRACTOR certifies its compliance with these provisions as follows: "CONTRACTOR certifies that CONTRACTOR has complied with the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 with respect to all CONTRACTOR's employees, subcontractors, agents, and subcontractors' employees or agents ("Employees") regardless of whether those Employees are paid or unpaid, concurrently employed by OUSD, or acting as independent contractors of CONTRACTOR, who may have contact with OUSD pupils in the course of providing services pursuant to the Agreement, and the California Department of Justice has determined that none of those Employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. Contractor further certifies that it has received and reviewed fingerprint results for each of its Employees and Contractor has requested and reviews subsequent arrest records for all Employees who may come into contract with OUSD pupils in providing services to the District under this Agreement.

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

19. **No Rights in Third Parties:** This Agreement does not create any rights in, or inure to the benefit of, any third party except as expressly provided herein.
20. **OUSD's Evaluation of CONTRACTOR and CONTRACTOR's Employees and/or Subcontractors.** OUSD may evaluate CONTRACTOR's work in any way that OUSD is entitled to do so pursuant to applicable law. The OUSD's evaluation may include, without limitation:
 1. Requesting that OUSD employee(s) evaluate the CONTRACTOR and the CONTRACTOR's employees and subcontractors and each of their performance.
 2. Announced and unannounced observance of CONTRACTOR, CONTRACTOR's employee(s), and/or subcontractor(s).
21. **Limitation of OUSD Liability:** Other than as provided in this Agreement, OUSD's financial obligations under this Agreement shall be limited to the payment of the compensation provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event, shall OUSD be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of, or in connection with, this Agreement for the services performed in connection with this Agreement.
22. **Confidentiality:** CONTRACTOR and all CONTRACTOR's agents, personnel, employee(s), and/or subcontractor(s) shall maintain the confidentiality of all information received in the course of performing the Services. CONTRACTOR understands that student records are confidential and agrees to comply with all state and federal laws concerning the maintenance and disclosure of student records. This requirement to maintain confidentiality shall extend beyond the termination of this Agreement. Contractors will be permitted

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

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

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

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

- 24. **Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion:** CONTRACTOR certifies to the best of his/her/its knowledge and belief, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency according to Federal Acquisition Regulation Subpart 9.4, and by signing this contract, certifies that this vendor does not appear on the Excluded Parties List (<https://www.sam.gov/>).
- 25. **Litigation:** This Agreement shall be performed in Oakland, California and is governed by the laws of the State of California. The Alameda County Superior Court shall have jurisdiction over any state court litigation initiated to enforce or interpret this Agreement.
- 26. **Incorporation of Recitals and Exhibits:** The Recitals and each exhibit attached hereto are hereby incorporated herein by reference.
- 27. **Integration/Entire Agreement of Parties:** This Agreement constitutes the entire agreement between the Parties and supersedes all prior discussions, negotiations, and agreements, whether oral or written. This Agreement may be amended or modified only by a written instrument executed by both Parties.
- 28. **Counterparts:** This Agreement and all amendments and supplements to it may be executed in counterparts, and all counterparts together shall be construed as one document.
- 29. **Signature Authority:** Each party has the full power and authority to enter into and perform this Agreement, and the person signing this Agreement on behalf of each Party has been given the proper authority and empowered to enter into this Agreement.
- 30. **Contract Contingent on Governing Board Approval:** OUSD shall not be bound by the terms of this Agreement until it has been formally approved by OUSD's Governing Board, and no payment shall be owed or made to CONTRACTOR absent formal approval. This Agreement shall be deemed to be approved when it has been signed by the Board of Education, and/or the Superintendent as its designee.
- 31. **W-9 Form:** If CONTRACTOR is doing business with OUSD for the first time, complete and return with the signed Contract the W-9 form.

OAKLAND UNIFIED SCHOOL DISTRICT

- President, Board of Education
- Superintendent
- Chief or Deputy Chief

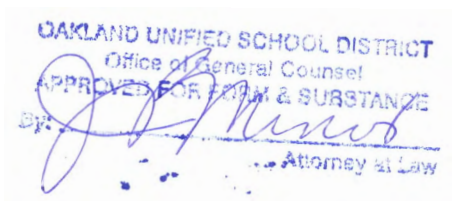
Secretary, Board of Education

CONTRACTOR

Contractor Signature

Tim Tabernik
President
Print Name, Title

Form approved by OUSD General Counsel for 2014-15 FY



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 By: OT

EXHIBIT "A" SCOPE OF WORK

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

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

See attached

HTA

Hatchuel Tabernik & Associates Inc

2014-15 Scope of Work

Date: August 29, 2014
To: Gretchen Livesay, Director of College and Career Readiness, Oakland Unified School District
From: Danielle Toussaint, Director, Research & Evaluation
CC: Tim Tabernik, President
RE: OUSD i3 2014-15 Evaluation

Description of Project: HTA hereby proposes to consult with Oakland Unified School District on the Investing in Innovations (i3) research grant (“Oakland Accelerates”) funded by a four-year Department of Education (Ed) federal grant. This is the third year of a four-year evaluation and research study. The duration of the proposed scope of work will be based on the 2014-15 school fiscal year, beginning July 1, 2014.

HTA will provide the following materials, services, and deliverables:

- HTA will produce an **interim evaluation report** summarizing findings from the first two years of the program implementation (2012-2014). Formative and baseline outcome data will be analyzed and synthesized for this report. The report will include a 4-page executive summary. A draft will be provided to the i3 Project Director and implementation team for review. Feedback will be incorporated into the final draft, as appropriate. The target date for the final draft is September 30, 2014.
- HTA will present the findings of the interim evaluation report to the project director, I3 project team, and OUSD administrators at their convenience.
- HTA will continue to collect and analyze data relevant to the **final i3 evaluation report**, and as outlined in the Department of Education-approved 2013 Oakland Accelerates evaluation plan. This final i3 evaluation report is scheduled for completion by June 2016. The following data will be collected:
 - Post-surveys of OUSD high school teachers, principals, and counselors in Spring 2015;
 - In-person key stakeholder interviews in Spring 2015; and
 - 2014-15 student-level data from OUSD and the comparison school district.
- HTA will create an analysis plan to guide OUSD’s reporting for the **required 2014 Annual Performance Report (APR)** to the Department of Education.
- HTA will request and analyze performance data needed for the 2014 APR.

- HTA will submit a draft to the i3 Project Director for review. Feedback will be incorporated into the final draft. The anticipated due date for the APR is April 1, 2015.
- HTA will provide assistance to the i3 Project Director in uploading the required documents into the online reporting system.
- On a quarterly basis, HTA will produce data briefs for presentation at i3 program meetings.
- HTA will send a senior associate and associate to the Department of Education's annual i3 grantees conference in Washington, D.C. The anticipated meeting date is June 11-12, 2015.
- HTA will attend meetings by phone with the National Evaluation Technical Assistance team (i.e., Abt Associates) as requested.
- HTA will check-in monthly with the i3 Project Director on evaluation progress and communicate immediately with client about any challenges that may delay evaluation progress.

Client will provide/be in charge of the following:

- The client will help coordinate the administration of the post-surveys to teachers, principals, and counselors.
- The client will facilitate data requests to the OUSD Research and Evaluation Office, as needed.
- The client will assist in coordination of key stakeholder interviews, as needed.
- The client will share feedback with HTA on the interim report and APR in a timely manner.
- The client is responsible for final submission of the APR to the Department of Education before the due date.

Scope of Work: The following scope of work is predicated on the assumption that the client and key subcontractors will be significantly engaged in the evaluation process as outlined above. This scope may be modified by written consent of the parties, if the deliverables or workload is changed substantially during the course of the project. The contract will be project deliverable with quarterly invoices.

Activity	Total Cost
Start Up & Ongoing Project Management	
2014-15 Project launch meeting	
Monthly check-ins with PD	
Monthly phone calls with Nat'l Evaluation TA provider re: research study	
Quarterly meetings with i3 implementation team	
Evaluation Planning	
APR analysis plan	
Key stakeholder interview protocols	
Post-surveys for OUSD teachers, principals, and administrators (scannable)	
Student-level data requests to Research Offices (OUSD & Comparison District)	
Data Collection	
Post-survey administration/collection	

Interviews administration (x8)	
Coordination of data requests (x2)	
Data Entry	
Interviews- Transcription	
Post-surveys (scanning software)	
Analysis & Reporting	
Production of data briefs for quarterly steering committees	
Analysis of data for interim evaluation report	
Analysis of data for APR	
Production of Interim Evaluation Report	
Presentation of Interim Evaluation Report findings (includes travel)	
Production of 2014 APR	
Annual Conference	
Airfare/ground transport (annual conference) x2	
Hotel x 3 nights (annual conference) x2	
Per diem x 3 days (annual conference) x2	
Annual grantee conference (2 days) x2	
Travel time to conference x2	
Total	\$70,000

Pricing of services is calculated based on:

Principals	\$175/hr
Senior Associate	\$150/hr
Associate	\$125/hr
Project Coordinator	\$100/hr
Administrative/Project Assistant	\$ 50/hr
Data Entry	\$ 40/hr

We thank you for the opportunity to continue working with OUSD on this project. Please feel free to give me a call to discuss any element of this proposal.

Best,

Danielle Toussaint. Ph.D.
 Director of Evaluation & Research

Professional Services Contract

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.

See attached

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

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

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

Please select:

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



Hatchuel Tabernik & Associates Inc.

Your vision. Our passion. A world of results.

Principals

Tim Tabernik, *President*

Dina Hatchuel, *LCSW, CEO*

"Creating a more equitable and just society."

Hatchuel Tabernik & Associates Inc.

At HTA our mission is *to support and empower organizations to create a more healthy, educated, equitable and just society*. We accomplish our mission by supporting agencies, especially those working at the intersection of public and private systems, to improve the lives of children, families, and community. We have assembled an extraordinary team of professionals who are dedicated to the HTA mission and who consistently apply their expertise and experience as writers, planners, trainers and evaluators to develop and strengthen important community change initiatives.

Our deep understanding of social services, physical and behavioral health, workforce development and early childhood, K-12 and higher education enables HTA to support systems improvement, program development, and collaboration in these sectors. Our technical skills ensure that all our services are delivered with high quality and attention to best practices.

Let HTA be your full service consulting resource. Our commitment to excellence and customer service will ensure a significant return on your investment.

Message from the President

When my partner, Dina Hatchuel, and I founded HTA in 1997, I was the Executive Director of a mental health and child welfare agency and Dina was the Executive Director of a hospital psychiatric department. After many years of doing this work, we realized that our public human service and educational systems were broken—not for lack of talent, effort, good intentions or even money—but because of fragmentation within and between systems. We formed HTA with the goal of improving the effectiveness and impact of public and private service agencies and systems on the wellbeing of children, families and communities. We seek to eliminate the predictability of success or failure based on family income, the zip code in which the family lives or their race and ethnicity.

Tim Tabernik

President

Hatchuel Tabernik and Associates

Hatchuel Tabernik & Associates is an independent consulting firm that provides cost-effective, high-quality services for public agencies, educational institutions, nonprofit organizations, charitable foundations, and health care organizations. HTA's team is headquartered in Berkeley, CA.

Our Services

- Evaluation and Research
- Grant and Technical Writing
- Strategic, Business, and Community Planning
- Training and Technical Assistance

Our Professional Philosophy

HTA provides results-oriented consultation. We are experts at delivering products and services that are both methodologically-rigorous and accessible to a diverse stakeholder audience. We serve traditionally under-represented and under-served communities and individuals with products and services that are accessible and useful to them. Our team works flexibly to adjust to changing circumstances and needs – while building the capacity of our clients and making organizations stronger.

Our Areas of Expertise

- PreK-16 education & youth development
- Child welfare & mental health
- Adult & juvenile justice
- Workforce investment & economic development
- Place-based community revitalization

Our Projects

HTA grant writers have raised more than \$375 million in public investments including:

- Race to the Top District (\$29 million)
- Investing in Innovation (\$26 million)
- Promise Neighborhoods (\$25 million)
- 21st Century Community Learning Centers (\$100 million)

HTA evaluators have completed scores of program evaluations, including:

- After-school and school-based educational and student support programs
- Statewide evaluation of the School Assistance and Intervention Team (SAIT) program
- Centers for Disease Control and Office of Minority Health: *Proyecto Movimiento* place-based health initiative
- Evaluations of criminal justice reform programs funded by the U.S. Department of Justice, Office of Justice Programs and California Department of Corrections and Rehabilitation

HTA training and planning staff have completed many assessments and planning projects:

- Evaluation capacity building for the Haas Center for Public Service, Stanford University
- Planning and facilitation of countywide Mental Health Service Act
- Strategic plans for two Northern California First 5 Commissions
- Evaluation capacity building training for the San Francisco Controller's Office

Selected Initiatives

A few examples of our signature work are listed below.



Full Service Community Schools

From the beginning, HTA has been committed to Full Service Community Schools. Schools are often the last institutions left standing in many low-income neighborhoods where disinvestment and systematic disenfranchisement are pervasive and services are typically lacking.

Community Schools co-locate and integrate services and informal supports at neighborhood schools to serve students, families and the whole community. Typical Community School services include: after-school programs; academic support; health and mental health programs; parent engagement and mentoring. In partnership with our nonprofit arm, the Center for Strategic Community Innovation, we work with school districts, schools and their partners to significantly improve access to services, system integration, the quality of services and child and family outcomes.



Disproportionate Minority Contact

Similarly, our work supports systematic delinquency prevention and adult and juvenile reentry strategies. We help our clients to address the pernicious disproportionality of the justice system by race and class. Our planning, grant writing and evaluation work builds on the emerging research and evidence-based practices that show promise for changing the “predictability of failure” among low-income youth and young adults of color who are caught up in the criminal justice system. We partner with our clients to conceptualize, test and evaluate innovative programs that help these young people to find a way back as contributing members of their community.



Promise Neighborhoods

HTA works to bring proven, place-based strategies to geographically defined, high-need communities of opportunity (Promise Neighborhoods).

We help our clients to listen deeply; to empower local residents, parents, students and effective organizations; and to plan and build a “pipeline” of supports and services that ensure all children and youth are prepared to graduate from high school prepared for college, career and community. Our Promise Neighborhood work has included planning, grant writing and program evaluation and accountability services for sites across the country.



Grant and Technical Writing

HTA has almost 20 years of success in writing governmental and foundation grants. Our grant writing team has yielded our clients over \$350 million in funding.

Our Clients

- Public School Districts
- County Offices of Education
- City and County Agencies
- Higher Education
- Community-based Non-profit Organizations
- Philanthropy

Areas of Success

- ✓ Pre K-16 Education
- ✓ Career Technical Education
- ✓ Workforce Development
- ✓ Technology
- ✓ Social Services
- ✓ Mental Health
- ✓ Violence Prevention
- ✓ Criminal & Juvenile Justice

Successful grant writing is a collaborative process

We work with our clients to identify funding opportunities that are most likely to be consistent with their organizational goals. We carefully evaluate and balance the funder's technical requirements with our client's goals and capacity.

We often facilitate program planning and collaboration among participating agencies and help clients adopt best-practice programs and innovations that enhance their services and strategies. Our grant writers spend time with clients to get an accurate feel for each organization in order to ensure that our grants capture their qualities and context. In this process we also ensure that, once funded, the agency has the capacity to deliver on its grant commitments.

HTA also assists clients in developing their own fundraising capacity

Our specific areas of expertise include: board development and training; strategic planning that includes fund development; grant writing coaching and editing; and development of sustainability plans.

I would like you to know how much [My Team] and I appreciated HTA's work with us on the i3 grant. As you know, it was a very challenging grant, and certainly the most ambitious we have ever tried to conceptualize, pull together and write. Having HTA work with us on it was incredibly helpful. The combination of your ability to ask really good questions to sharpen our thinking, your grant writing expertise, and your team's willingness to go above and beyond a regular work day to get the job done was a terrific combination. And in addition, you were fun to work with!

*Ruth Schoenbach Co-Director
Strategic Literacy Initiative/WestEd*

We have established a reputation for fairness, high performance, and results-oriented consultation. Our return on investment is extremely high. We are pleased to provide prospective clients with an initial assessment of their needs and a candid appraisal of our ability to assist them in a cost-effective manner.

5,998%

HTA's Average Return on
Investment for
Government Grants or
\$60 gained per dollar spent

HTA

Evaluation and Research

HTA offers comprehensive, cost-effective evaluation services to a broad spectrum of community service organizations. The box to the right lists the type of program we have recently evaluated in the Bay Area and statewide.

Approach

We are pragmatic as well as rigorous in our evaluation methods. We work to understand your needs and those of your funders, and we ensure that our evaluations answer established research questions, drive continuous improvement, and provide funders with performance data to make informed decisions. We often utilize community-based participatory approaches that involve the communities you serve in the evaluation process.

Design

We have experience designing and executing a variety of evaluation approaches. We use mixed-methods (quantitative and qualitative) and experimental, quasi-experimental or non-experimental design depending on the context. In place-based, multi-sector projects, we use Results Based Accountability and Collective Impact approaches that evaluate collaborative program impact at the population level.

Focus: Our evaluation focus is to provide rigorous, meaningful, actionable feedback to you, our client, and your funders. This may require review of baseline data, development of logic models and evaluation design, interim information on fidelity of implementation, formative reporting on intermediate outcomes, and summative reports on program quality, outcome and impact.

Accessibility

HTA has a great deal of experience communicating with diverse stakeholders, and over the years we have refined our strategies to ensure that community residents, parents, program participants and youth are incorporated as important constituents in designing evaluations, as key informants and as audiences for our reports. Therefore, we work closely with you, our clients, to understand issues of language, culture, class and place that apply to your stakeholders.

Project ACCESS staff is very appreciative of the level of professionalism and support that HTA has shown over the course of this project. HTA and Project ACCESS staff worked effectively because of their open communication, mutual respect and transparency in their work. . . Incorporating an evaluation component to the project was a fundamental way for Project ACCESS to arrive at solid conclusions and build capacity towards effective fundraising in the future. Furthermore, the learning experience of developing tools like the Logic Model and Theory of Change allowed CCEB as an agency to build capacity in replicating formats and approaches for successful program design.

*Lisa Raffel, Project ACCESS Director
Catholic Charities of the East Bay*

Types of Programs

- ✓ K-12 out-of-school-time
- ✓ Community engagement
- ✓ Early childhood education
- ✓ Gang prevention/intervention
- ✓ Mental health prevention & early intervention for all ages
- ✓ Nutrition and fitness
- ✓ Re-entry
- ✓ Career Technical Education and college readiness
- ✓ Linked Learning
- ✓ Science Technology Engineering & Math (STEM)
- ✓ Substance abuse/violence prevention
- ✓ Trauma-informed programs for all ages
- ✓ Workforce development for all ages



Planning and Training

HTA provides organizational planning and development services for public agencies, school districts, foundations and nonprofit organizations across the spectrum of services from early childhood education to criminal justice. We typically work at the intersection of systems and programs – helping our clients make strategic and tactical decisions that improve their impact.

Strategic & Business Planning

We work with agency administrators, commissions, and boards of directors to reinvent and/or reinvigorate public and private agencies with an eye toward refining an agency's vision and mission, developing short- and long-term plans and funding strategies and co-creating practical work plans for achieving their goals and objectives. Our strategic planning approach results, not only in a great roadmap for the future, but it is also a vehicle that builds buy-in and support for the agency's work as it travels down that road.

Planning Services



- ✓ Strategic planning
- ✓ Program design and evaluation
- ✓ Organizational restructuring
- ✓ Personnel/management practices
- ✓ Assessment of organizational and community needs and resources
- ✓ Strategic alliances/collaboratives
- ✓ Board development
- ✓ Financial planning/fund development
- ✓ Meeting and retreat planning and facilitation
- ✓ Community assessments and plans
- ✓ White papers and special reports

Community Engagement & Community Change

We are also highly skilled at facilitating deep collaboration between policy makers, funders, service providers and community residents. We help our clients engage all stakeholders, especially those who are traditionally disenfranchised and we have the expertise to incorporate popular education techniques and graphic facilitation in order to be inclusive and boost participation. We have worked with collective impact community change efforts and place-based initiatives and can provide excellent support that will help you meet the unique challenges these types of projects face.

I cannot thank you enough for the tremendous work you did to help us pull the Workforce and Economic Development strategic plan together so effectively. It is being vetted by various groups and is receiving excellent reviews. The HTA staff was outstanding to work with.

Kim Schenk, Dean, Career Technical Education and Economic Development

Data Informed

Before making recommendations or finalizing any plan, the HTA team ensures that our clients have considered data and assessments that can inform their decision. Our staff has formal training in the social sciences and can integrate evidence into your planning process in ways that are illuminating, though provoking, and fun. We are also keen observers of the third sector landscape and are available for the production of white papers, scans of the field, and special reports.

HTA

Selected Clients

Public Agencies

- Alameda County
- City and County of San Francisco
- City of Berkeley
- City of Oakland
- Contra Costa County
- Merced County
- Nevada County
- San Joaquin County

Within public agencies we have worked with:

- Associated Community Action Programs
- Interagency Children's Policy Councils
- Departments of Probation
- Departments of Social Services
- Sheriff's Department
- Community Behavioral Health Services
- Departments of Public Health
- First 5 Commissions
- Offices of the Controller
- Redevelopment Agencies
- Offices of Economic and Workforce Development

Non-Profit Agencies

- Bay Area Community Resources
- Catholic Charities CYO of San Francisco
- Mission Neighborhood Centers
- Oakland Parents Together
- Oakland Private Industry Council
- PlayWorks (formerly Sports4Kids)
- Richmond Children's Foundation
- SRI International
- College Track
- Contra Costa Arc
- Contra Costa County Clubhouses
- East Bay Asian Youth Center
- East Bay Community Foundation
- Familias Unidas
- Foundation for California Community Colleges
- Girls, Inc of Alameda County
- Healthy Oakland
- Job Train
- Lincoln Child Center
- Tides Center
- West Coast Collaborative
- West Ed
- YMCA of the Silicon Valley
- Youth Employment Partnership
- Youth Radio

Educational Organizations

- California Department of Education
- California State University East Bay
- California Office to Reform Education (CORE)
- Stanford / The Haas Center
- UC Berkeley
- UC San Francisco
- Contra Costa Community College District
- Hayward Unified School District
- New Haven Unified School District
- Monterey County Office of Education
- Stanislaus County Office of Education
- Oakland Unified School District
- San Francisco Unified School District
- Berkeley Unified School District
- West Contra Costa Unified School District

Staff Biographies

Principals

Dina Hatchuel, LCSW, HTA's Chief Executive Officer, has over 30 years of experience in designing, developing, and managing educational, social service, and mental health programs. She has served as an administrator, trainer, and evaluator in schools, hospitals, residential and day treatment centers, and community based organizations. She has broad expertise in planning, facilitation, training, business and agency operations, and program evaluation. Working with personnel of various disciplines, Dina has provided training, mentorship, and hands-on technical assistance at both the operational and administrative levels of programs and organizations. Her areas of knowledge and expertise include: children and families, preschool, education, school reform, school-linked services, health and mental health, social services, business development, agency operations, and organizational development.

For over five years, Dina was the Lead for the Bay Area Region 4's Afterschool Technical Assistance and Training Program. Prior to forming HTA, Dina was Executive Director of Adult and Medical Psychiatry and Chemical Dependency Services at St. Mary's Medical Center in San Francisco.

Born and raised in Zimbabwe, Dina earned her undergraduate degree in Social Work and Masters in Psychiatric/Clinical Social Work at the University of Cape Town, South Africa. She served as a lecturer at the University of Cape Town's School of Social Work from 1980 to 1983 and in 1985-86, she was an International Learning Exchange Fellow at the Center for Child and Youth Development and Research, University of Minnesota.

Tim Tabernik, HTA President, has over 30 years of experience as an administrator, program planner and developer, and fundraiser in education, behavioral health, child welfare, and juvenile justice. He is a skilled group facilitator, trainer, strategic and tactical planner, and grant and technical writer. As a grant writer, Tim has helped numerous public and private entities obtain funding from public and private sources, raising over \$125 million. Tim has a long history of involvement in community planning and collaboration as well as extensive experience providing technical assistance to after-school and other school-linked services. He has assisted public and behavioral health care, social services and criminal justice agencies and private institutions to develop strategic plans and implement innovative programs and system reform strategies.

As executive director of a nonprofit agency for over 25 years, Tim developed and managed budgets in excess of \$4 million and supervised a staff of over 100 professional, technical, and classified personnel.

Professional and Technical Staff

Lori Allio, PhD, Senior Associate/Planning and Training Team Manager has more than 20 years of experience working with foundations, nonprofits, governments and multilateral organizations as a manager, planner, facilitator, trainer, and researcher. Her expertise encompasses several fields including health, workforce development, community development, neighborhood revitalization, migration, political economics, public policy, and evaluation. Her experience working with nonprofit organizations includes: managing a small bi-national sustainable community development organization in Veracruz, Mexico; supporting the African Democratization Program and the Conflict Resolution Program at the Carter Presidential Center; direct support for local, national, and international entities in various consultant capacities; and acting as a Research and Policy Manager for the California Endowment and the Rockefeller Foundation. Lori holds a BA in Economics and Political Science from U.C. Berkeley, an MA from the School of International Relations at the University of Southern California, and a Doctorate in Political Science from Emory University. She is a lecturer in international development, foreign policy, and international nonprofit practices and has published on a variety of topics related to non-governmental organizations, communities, policy, and development. Lori speaks excellent Spanish, good Polish, some Russian, and a bit of Italian.

Randy Malat, MA, MS, Senior Associate/Grant Team Manager, has 11 years of experience in journalism, writing, editing and online content development. Randy is particularly adept at assimilating vast amounts of technical material in a wide variety of subject areas, working with diverse groups of collaborating organizations, and transforming this information into cogent and compelling prose. Because of these skills, Randy has written successful grant proposals that have raised over \$120 million in funding for school districts, city and county governments, community colleges, and non-profit organizations since coming to HTA in 2001. These grants have funded a wide variety of educational, youth development, social service, workforce development, health promotion, and criminal justice programs sponsored by public and private funders. Before coming to HTA, Randy worked as an editor and writer in the health/medical field, journalist, and educator. He has an extensive publishing history as author and editor of non-fiction books, newspaper articles, and on-line content. Randy received a BA in Journalism from UC Berkeley, an MS in Journalism from the University of Oregon, and an MA in History from UCLA. He is fluent in Spanish.

Danielle Toussaint, PhD, Senior Associate/Evaluation and Research Team Manager, has 15 years of experience in research, evaluation, and consulting, including key roles on cross-site, multi-year federally funded projects with experimental, quasi-experimental, or cross-sectional designs. Danielle has broad content knowledge in youth development, after school programming, public health, ATOD prevention and treatment, co-occurring mental health disorders, adolescent risk-taking behavior, race/ethnicity, homelessness, and statistics. Prior to HTA, Danielle has worked as a researcher and statistician for a state-level Department of Vital Statistics, a state-level Office of Court Administration, and a statewide substance abuse research group. She also conducted research in Brazil and Argentina. She brings a sophisticated understanding of evaluation methods and statistical procedures to her work at HTA. Danielle earned her BA in Sociology, her MA in Demography, and her PhD in Sociology from the University of Texas at Austin. Her Ph.D. work had an emphasis on criminology and statistics. She speaks fluent Portuguese.

Jayne Williams, MA, Senior Associate, is an HTA grant writer and planner. For the past 15 years Jayne has written successful grant proposals. In the past seven years at HTA she has raised more than \$145 million in funding for city governments, workforce investment organizations and non-profit organizations. Her content expertise includes experiential education, job training, labor market research, and school-to-career initiatives. Jayne has demonstrated expertise in helping clients thoroughly plan initiatives and programs and in securing funding to implement these plans. Before coming to HTA in 2004, Jayne worked at NOVA, a nationally-recognized workforce organization in Silicon Valley, where she was involved in strategic planning, quality initiatives, and marketing, as well as writing grants. Jayne received her BA in Russian Language and Literature from Harvard University, and her MA from UC Berkeley. She is a published author in the field of health and fitness. She is fluent in Russian.

Ruthie Chang, EdM, Associate brings over ten years of experience from the fields of educational research, family and child social services and the elementary school classroom. Ruthie has conducted research on large- and small-scale education studies on topics including: online math games; teacher professional development programs; and a statewide science, technology, math and engineering (STEM) initiative. In addition to broad content knowledge regarding K-12 education trends, research, and innovations, she has a particular interest and expertise in the social-emotional and cognitive development of youth. She earned her BA from the University of North Carolina at Chapel Hill in Sociology and Communications and her Master's Degree from the Harvard Graduate School of Education in the Mind, Brain, and Education program.

Kristie Glatze, Associate, has seven years of evaluation and consulting experience and has conducted a number of evaluations of after-school, health education and social service programs. Kristie conducts and oversees others conducting site visits, key informant interviews, program activity observations, and she helps to design and oversee online and hard copy survey administration. Previously, as the HTA Evaluation Coordinator, she worked with the entire Evaluation Team to organize work flow and ensure compliance with a wide variety of funder requirements. Kristie received her BA in Liberal Studies from California State University at Hayward and has taken formal education and counseling courses at Saint Mary's College in Moraga. She has elementary school classroom experience.

Kendall Heaton, MSW, Associate, has over 12 years of experience as an educator and social worker committed to the process of creating vibrant communities and integrated support systems that allow children, families and communities to thrive. She has extensive experience as a coach, trainer, facilitator, researcher, and advocate in the fields of education, early childhood education, child welfare, and community development. Kendall has provided program planning, coordination, evaluation, and analysis for community-based organizations, school districts, and foundations. She is an expert in multi-systemic, multi-stakeholder reform efforts, in particular, with planning and implementation of Full Service Community Schools. Kendall holds a Master's Degree in Social Welfare from UC Berkeley with a focus on Community Practice, Planning and Policy. Her undergraduate degree is in Education and Liberal Studies with an emphasis on Cross-cultural Humanities from San Francisco State University. Kendall is fluent in Spanish.

Chandreve Clay, MPA, Planning and Training Coordinator, has over ten years' experience in project management, data collection and analysis, and content knowledge in community health. Chandreve also acts as a co-facilitator for the training team and as project lead for the Planning and Evaluation Teams. Prior to assuming her current role, Chandreve was the Grants Coordinator at HTA. She is a founding member of Clear Creek Services, Inc, a non-profit providing aging-in-place housing for adults with developmental disabilities, and remains an active volunteer and current board member. She received her BS in Health Science and her MPA in public and non-profit administration from California State University East Bay.

Sara Sherman, MBA, Grants Coordinator, brings over 11 years of project management experience to HTA. She provides coordination, grants research and project management support to the HTA Grant Team. Sara has extensive experience with operations, marketing, financial and project management. She also brings several years of administrative experience in highly demanding, fast-paced positions in the medical field. Her technical skills, ability to multi-task, and calm and helpful demeanor make her the ideal Grants Coordinator. Sara received her BA in architecture from Wesleyan University and an MBA from Central European University in Budapest, Hungary.

Administrative Staff

Russell Lobar, Business Manager, brings over 20 years of experience in business, financial management, customer service and logistics. Before joining HTA, Russell served as Controller at Bookpeople a large independent book wholesaler, Finance and Operations manager at Torque Systems Data Storage and Business Manager at the East Bay Jewish Community Center. Russell received his BA from New College of California.

Simon Troll, IT and Operations Coordinator, brings over 10 years of experience in project support and IT. He provides company-wide administrative, IT, and graphics support including Geographic Information System (GIS). Simon has provided GIS mapping for use in grants, planning and evaluation projects in support of entire company. Prior to HTA, he was an analyst for land use economists and the production manager for video-based trainings. Simon received a certificate in Geographic Information Systems (GIS) from San Francisco State University and a BA in Language Studies from the University of California at Santa Cruz.

Sarah DeWitt, Receptionist/Project Assistant, brings over six years of experience in project and event management to HTA. She has additional experience in program and educational development within the Bay Area. She provides our team with administrative, executive and project support. Prior to joining HTA, she worked in investor relations. Sarah received a BA in Economics from the University of California, Santa Barbara. She speaks conversational Spanish.

Affiliate Associates

Jennie Brick, Affiliate Senior Associate, is a seasoned administration and accounting consultant. Having worked in the non-profit sector for over twenty-five years, Jennie is experienced in assessing existing systems and creating new systems to streamline and improve agency fiscal accountability. She has trained management, staff, board members, and volunteers in the areas of budgeting, general fiscal operations, public speaking, and office administration. Jennie teaches the Financial Management for Nonprofit Organizations course for the Nonprofit Certificate Program at California State University East Bay.

Melina Bersamin, PhD, Senior Associate has over ten years of experience in research, evaluation and grant writing, in the area of child and adolescent development and public health. Melina has expertise in the area of child and adolescent development, psychosocial and environmental correlates of adolescent risky behaviors, and research methods. She recently completed a study focusing on the effect of access and availability of family planning clinics on adolescent sexual behaviors. Prior to HTA, Melina was an Assistant Professor at California State University, Sacramento and taught classes on child development, parenting, and research methods to undergraduate and Master's students in the Department of Child Development in the College of Education. Melina has collaborated on a diverse array of projects including an evaluation of a web based alcohol prevention program for college students, examining the role of the media on adolescent risky behavior, and assessing the effectiveness of an experiential learning curricula. Melina earned her BA in Psychology at University of California Berkeley and her Ph.D. in Human Development from the University of California, Davis.

Joan Cospers, Affiliate Associate, has more than 20 years of experience as a nonprofit professional and educator. She has worked as a grantmaker, designed and directed youth development programs, and secured large contributions from major donors, foundations, and public entities. At the East Bay Community Foundation, Joan held various positions including Vice President for Community Investment and Director of Donor Engagement. During her eight year tenure, the Foundation's assets grew from \$115 million to \$400 million and Joan's reputation for offering donors sophisticated, personalized, impact-oriented philanthropic services was instrumental in attracting major donors. She created the Foundation's Donor Partner program which provides donors access to personalized, high level grantmaking services and leverages \$3 million annually for effective community based organizations that are working to promote equitable, healthy communities in the East Bay region. While at the Foundation, she designed and managed grants programs for family, corporate and community foundations. Joan has managed youth development, service learning, and leadership programs for middle and high school youth, and taught English as a second language to children and adults. She has a BA in American Studies from the University of California at Santa Cruz and a certificate from the Stanford University Graduate School Business' Executive Program for Philanthropy Leaders.

Jenn Fisher, PhD, Affiliate Associate, has been doing non-profit development and grant writing since 2006, and has experience writing state, local, federal and foundation grants for school-districts and non-profit organizations seeking funding for youth development and after school programs as well as college prep, alternative education, physical education, and substance abuse

prevention programs. She has a PhD in philosophy from the Graduate Center of the City University of New York, and is the author of *On the Philosophy of Logic* (2007). She currently teaches part time at the University of San Francisco.

Cindy L. Myers, PhD, Affiliate Senior Associate, has over 25 years of experience as a nonprofit executive and over 16 years of strategic planning and organizational development consulting experience. She holds a PhD in Human and Organizational Systems, a MA in Organizational Development and a MA in Counseling Psychology. She has led a diverse array of not-for-profit service agencies including children and family services, mental health, substance abuse and public-private partnerships. Cindy has designed and facilitated training courses on peer advocacy, group facilitation, collaborative leadership, crisis intervention, public dialogue and family group decision making. She is highly sought for her expertise in functional organizational assessment, designing turnaround strategies, strategic and business planning and non-profit business modeling.

Kirsten Piroth, MPhil, Affiliate Associate, has worked in research and evaluation for 15 years. The majority of her experience has been in the fields of public health and education where she has worked on a number of studies pertaining to substance abuse, women and child health issues, teen parenting and school readiness as well as in homeless and welfare populations. Her experience has involved design and implementation of surveys and standardized measures, as well as the analysis and subsequent presentation of data to public agencies. Kirsten received a Bachelor of Biological Science (BSc honors) degree from Edinburgh University, Scotland and a Master of Philosophy (MPhil) research degree in sport psychology from Brighton University, UK.

Amy Wachspress, MA, Affiliate Associate, has more than 10 years of experience as a grant writer. She has worked as a manager in the nonprofit sector, and she is a published author and avid blogger. Amy's writing acumen, skill in program and evaluation design, and collaborative planning have contributed to her success in raising more than \$100 million dollars for clients in 25 states. She has worked extensively with public agencies, educational organizations, non-profits and Native American tribes. Her successful grants have included human services, health, education, juvenile justice, and employment development. Amy has her MA in English Language and Literature from the University of Michigan at Ann Arbor and her BS in English and Drama (Magna cum laude) from Syracuse University.

HTA

Client Praise

There simply is not enough that can be said about HTA's role in this **success story**. You all were the key to this positive outcome!

David Korth, *Neighborhood Services Manager*
City of Hayward, Office of the City Manager-Neighborhood Services

The combination of your ability to ask really good questions to sharpen our thinking, your grant writing expertise, and **your team's willingness to go above and beyond a regular work day to get the job done** was a terrific combination. And in addition, you were fun to work with!

Ruth Schoenbach, *Co-Director*
Strategic Literacy Initiative/WestEd

I think that I speak for all of us at DVC when I thank you profusely for the timely and professional assistance that you provided us throughout this planning effort. **Your facilitation and coordination skills are exemplary and HTA has hit a home run again.** Thank you so much.

Kim Schenk, *Dean of Career Technical Education and Economic Development*
Diablo Valley College

It was a pleasure working with all of you and getting to know you (HTA team). I appreciate your **sense of humor, dedication, and commitment to work as a team**. It really meant a lot that we working "together" and provided each other continuous feedback and supportive "energy." I'm really impressed with the level of detail that you all demonstrated during these stressful times. I had a great experience and I'm happy I had the pleasure of having it with you!!!

Marisa Raya Ramirez, *East Bay Director*
Bay Area Community Resources

Your work is
FANTASTIC!

David Kakishiba,
Executive Director
EBAYC

I appreciate your conscientious attitude that desires to produce a **superior work product... you encouraged us to take the time to do it "right."**

Harry Bruno
Alameda County Sheriff's Department

I have been so grateful to [the Evaluation team] over the past few weeks... [they helped] me **catch up in understanding the data as well as the reports.**

Cassie Gossett, Reform Coordinator
Vallejo Unified School District

WOW. That is all I can say.

You can write every grant I need for the rest of my life... Great job. Can't wait to begin work on next project with you...

Jody Mahoney, VP Business Development
Anita Borg Institute

Incorporating an **evaluation component** to the project was a fundamental way for Project ACCESS to arrive to solid conclusions and **build capacity towards effective fundraising in the future.**

Project ACCESS Staff
Catholic Charities of the East Bay

Thanks to all of you we submitted the **best proposal in my career** today. Maybe this is routine for you guys, but it was very special and meaningful to me; the process, the people and the purpose.

Kay O'Neill, Director, Workforce Development
San Mateo Community College District

THANK YOU, THANK YOU, THANK YOU!

I, and the partners, are so appreciative of the **extraordinary work** you did in pulling together the DOL Civic Justice Grant. I am not sure we would have been able to submit such a strong proposal without your extraordinary effort. To say that you are a grant writing team is to sell you short. Your work went beyond that simple description and made all the difference.

Fred Slone, Workforce Development Manager
County of San Mateo

HTA

Pricing Structure

Hatchuel Tabernik and Associates (HTA) strives to price each project in the most cost effective way possible for the client. Often this means that we encourage the client to take on at least some of the project responsibilities, depending on skill levels and experience. This not only saves money, but builds capacity in our clients for future projects.

HTA prices its services on either a flat fee or time-and-materials basis. Our flat fee prices are calculated based on anticipated hours and the following costs:

Staff Costs

Principals and Executive Coaching	\$150/hour
Senior Associates	\$125/hour
Associates	\$100/hour
Project Coordinators	\$75/hour
Project Assistants	\$50/hour

Other Costs

- Duplication @ \$0.10/page
- Color Printing @ \$0.35/page
- Postage/Mailing @ Post Office / FedEx rates
- Travel @ ½ hourly rate plus Parking, Tolls, or Train Fares

Scope of work: outlining responsibilities

We estimate project costs based on the overall work required and the division of responsibilities between HTA and client staff, creating a realistic scope of work that specifies mutual responsibilities, internal milestones, and deliverables. The scope of work will become part of the contract between HTA and our client agency. If the work deviates substantially from the original scope, HTA will negotiate with the client for an appropriate change order.

Contract types

We offer a variety of contract/billing arrangements, depending on the project and your needs: flat rates for clearly defined projects, straight time and materials, a monthly retainer, or an “up-to” contract that allows the client to plan for a ceiling cost, but also to benefit if the project can be done more efficiently with substantive contributions from client staff and partners. In fundraising, accepting a percentage of awarded funds is considered unethical according to the Association of Fundraising Professionals Standards of Professional Practice, and as such HTA does not engage in contingency contracts for grant writing services.

Contract Type	Details
Time & Materials	Work on demand as requested by the client. No ceiling.
Up-To	Pre-agreed ceiling. Work above this ceiling will not be billed.
Flat Fee	Pre-agreed fee. Half of the fee is due at the outset of the project.

Serving a limited role

We often contract with new clients to perform a limited role on a project, providing brief consultation on program design, partnerships, budget, and narrative, as well as editing and formatting documents. While we cannot guarantee as high-quality a final product in this advisory role, in our experience we can make a significant difference in boosting the quality of the work. In this capacity, we would work with the client to determine how we can best use the available budget – whether for 10 hours or 40 – to help you strengthen your proposal, strategic plan, or evaluation.

Grant Writing Return on Investment

We understand that there are many competing needs for limited resources and that our services represent a significant expense to many governmental organizations. Hiring a firm to write a grant feels like a risky proposition, because there is no guarantee of an award. However, our experience is that HTA provides a meaningful, quantifiable benefit to clients. 92% of the clients with whom we have developed a long-term working relationship have seen a positive return on the funds they “invest” with HTA.

Return on Investment (ROI) is money gained divided by money spent			
Approximate average HTA ROI for federal, state and local government grants:			5,998%
A Representative Sample of HTA Clients	Grants Written	Dollars awarded for each dollar spent	ROI
Mid-sized youth dev. non-profit (client since 2004)	72	\$ 36	3543%
Workforce development agency (client since 2004)	9	\$ 71	7033%
County probation department (client since 2005)	9	\$ 33	3175%
YMCA branch (client since 2004)	12	\$ 147	14562%

Note: For perspective, venture capitalists, who demand a high return on their investments, demand an ROI of 1000-3000%


[View assistance for Search Results](#)

Search Results

Current Search Terms: "Hatchuel Tabernik & Associates*"

Your search for ""Hatchuel Tabernik & Associates*"" returned the following results...

Notice: This printed document represents only the first page of your SAM search results. More results may be available. To print your complete search results, you can download the PDF and print it.

Entity	HATCHUEL TABERNIK & ASSOCIATES, INC.	Status: Active 
DUNS: 171356475	CAGE Code: 3KFW7	View Details
Has Active Exclusion?: No	DoDAAC:	
Expiration Date: 01/08/2015	Delinquent Federal Debt? No	
Purpose of Registration: All Awards		

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Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.



USER NAME

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Entity Dashboard

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HATCHUEL TABERNIK & ASSOCIATES, INC.

DUNS: 171356475 CAGE Code: 3KFW7

Status: Active

Expiration Date: 01/08/2015

Purpose of Registration: All Award

Entity Overview

Entity Information

Name: HATCHUEL TABERNIK & ASSOCIATES, INC.

Business Type: Business or Organization

POC Name: Tim Tabernik

Registration Status: Active

Activation Date: 01/08/2014

Expiration Date: 01/08/2015

Exclusions

Active Exclusion Records? No



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
11/4/2014

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 BANC OF AMERICA INS SERVICES INC 480204 P: (800) 771-9055 F: (800) 771-6080 PO BOX 33015 SAN ANTONIO TX 78265	CONTACT NAME: PHONE (A/C, No, Ext): (800) 771-9055	FAX (A/C, No): (800) 771-6080
	E-MAIL ADDRESS:	
INSURER(S) AFFORDING COVERAGE		NAIC#
INSURER A: Sentinel Ins Co LTD		
INSURER B:		
INSURER C:		
INSURER D:		
INSURER E:		
INSURER F:		

COVERAGES	CERTIFICATE NUMBER:	REVISION NUMBER:
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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 INSR	SUBR W/D	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	COMMERCIAL GENERAL LIABILITY			48 SBA LC9991	07/25/2014	07/25/2015	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"/> General Liab						MED EXP (Any one person)	\$10,000
	GEN'L AGGREGATE LIMIT APPLIES PER:							PERSONAL & ADV INJURY
	<input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input checked="" type="checkbox"/> LOC						GENERAL AGGREGATE	\$4,000,000
	OTHER:						PRODUCTS - COMP/OP AGG	\$4,000,000
								\$
A	AUTOMOBILE LIABILITY			48 SBA LC9991	07/25/2014	07/25/2015	COMBINED SINGLE LIMIT (Ea accident)	\$2,000,000
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person)	\$
	<input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS						BODILY INJURY (Per accident)	\$
	<input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS						PROPERTY DAMAGE (Per accident)	\$
								\$
	UMBRELLA LIAB						EACH OCCURRENCE	\$
	EXCESS LIAB						AGGREGATE	\$
	DED							\$
	RETENTION \$							\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						PER STATUTE	OTHER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)		N/A				E.L. EACH ACCIDENT	\$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE- EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$

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

Those usual to the Insured's Operations.

CERTIFICATE HOLDER	CANCELLATION
Oakland Unified School District Attn: Risk Management 1000 BROADWAY, STE 398 OAKLAND, CA 94607	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 <i>Joe Taylor</i>

BANC OF AMERICA INS SERVICES INC
PO BOX 33015
SAN ANTONIO TX 78265

HATCHUEL TABERNIK AND ASSOCIATES INC
2560 9TH ST STE 211
BERKELEY CA 94710

POLICY NUMBER: 48 SBA LC9991



THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED - PERSON-ORGANIZATION

02008
*2000248LC99910815

COUNTY OF MONTEREY
CONTRACTS/PURCHASING DEPARTMENT
168 W ALISAL ST FL 3
SALINAS, CA 93901
COVERAGE IS PRIMARY & NON-CONTRIBUTORY PER THE BUSINESS LIABILITY
COVERAGE FORM SS0008, ATTACHED TO THIS POLICY

OAKLAND UNIFIED SCHOOL DISTRICT
ATTN: RISK MANAGEMENT
1000 BROADWAY STE 398
OAKLAND, CA 94607
LOC 001/BLDG 001
THE BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY, ITS
OFFICERS, AGENTS, REPRESENTATIVES, EMPLOYEES, STUDENTS AND
VOLUNTEERS
340 BONAIR SIDING ROAD
STANFORD CA 94305-7250

THE SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT, ITS OFFICERS,
ITS OFFICERS, AGENTS, AND EMPLOYEES
C/O KATHY BLACKWOOD, EXECUTIVE VICE CHANCELLOR
3401 CSM DRIVE
SAN MATEO, CA 94402

FIRST 5 YOLO
403 COURT ST
WOODLAND, CA 95695

PROFESSIONAL SERVICES CONTRACT ROUTING FORM 2014-2015



Basic Directions

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

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

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

Attachment Checklist For All Consultants: Authorization to Work, which indicates vendor has cleared the registration and background check
 For All Consultants: Results page of the Excluded Party List (<https://www.sam.gov/>)
 For All Consultants: Statement of qualifications (organization); or resume (individual consultant).

OUSD Staff Contact Emails about this contract should be sent to: (required) cynthia.slater@ousd.k12.ca.us

Contractor Information

Contractor Name	Hatchuel Tabernik & Associates Inc.	Agency's Contact	Tim Tabernik				
OUSD Vendor ID #	V013083	Title	President				
Street Address	2560 9th Street, Suite 211	City	Berkeley	State	CA	Zip	94710
Telephone	510 559-3193	Email (required)	rlobar@htaconsulting.com				
Contractor History	Previously been an OUSD contractor? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				

Compensation and Terms – Must be within the OUSD Billing Guidelines

Anticipated start date	July 1, 2014	Date work will end	June 30, 2015	Other Expenses	
Pay Rate Per Hour (required)		Number of Hours (required)			

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
5846	Investing in Innovation	9125846201	5825	\$ 70,000.00
			5825	
			5825	
Requisition No. (required)	R0152150		Total Contract Amount	\$ 70,000.00

Approval and Routing (in order of approval steps)

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

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

1.	Administrator / Manager (Originator)	Name	Gretchen Livesey	Phone	510 273-2373	
	Site/Department (Name & #)	Linked Learning Office (912)		Fax	510 452-2070	
	Signature			Date Approved	11/7/14	
2.	Resource Manager, if using funds managed by: <input type="checkbox"/> State and Federal <input type="checkbox"/> Quality, Community, School Development <input type="checkbox"/> Family, Schools, and Community Partnerships <input type="checkbox"/> Risk					
	<input type="checkbox"/> Scope of work indicates compliant use of restricted resource and is in alignment with school site plan (CSSSP)					
	Signature			Date Approved		
3.	Network Superintendent/Deputy Network Superintendent					
	Signature			Date Approved		
4.	Chiefs / Deputy Chiefs Consultant Aggregate <input type="checkbox"/> Under <input type="checkbox"/> Over \$84,100					
	<input type="checkbox"/> Services described in the scope of work align with needs of department or school site					
	<input type="checkbox"/> Consultant is qualified to provide services described in the scope of work					
Signature			Date Approved			
5.	Superintendent, Board of Education Signature on the legal contract					
Legal Required if not using standard contract		Approved		Denied - Reason		
Procurement	Date Received			PO Number		
					Date	12/24/14