

| Board Office Use: Legislative File Info. | |
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| File ID Number | 14-1882 |
| Introduction Date | 11-5-14 |
| Enactment Number | 14-1878 |
| Enactment Date | 11/5/14 OA |



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) 11/5/14

Subject Professional Services Contract - Bright Research Group
- 922/Community Schools and Student Services (site/department)

Action Requested Ratification of professional services contract between Oakland Unified School District and Bright Research Group. Services to be primarily provided to 922/Community Schools and Student Services for the period of 09/01/2014 through 6/30/2015.

Background
A one paragraph explanation of why the consultant's services are needed.
The OUSD Wellness Champion Program has existed for the past 5 years. The program has 45 champions at 78 schools across the District. Champions implement the newly revised Wellness Policy, facilitate Wellness Councils and lead nutrition, physical activity, garden and staff wellness programs at their school sites.

Discussion
One paragraph summary of the scope of work.
Ratification by the Board of Education of a Professional Services Contract between the District and Bright Research Group, Oakland, CA, for the latter to provide services to create tools, analysis, reports, and technical assistance in order to strengthen and sustain the evaluation of the OUSD Wellness Champion Program for the Health and Wellness Unit in the Community School and Student Services Department for the periods of September 1, 2014 through June 30, 2015, in the amount not to exceed \$23,575.00.

Recommendation Ratification of professional services contract between Oakland Unified School District and Bright Research Group. Services to be primarily provided to 922/Community Schools and Student Services for the period of 09/01/2014 through 6/30/2015.

Fiscal Impact Funding resource name (please spell out) Kaiser- Health and Wellness
not to exceed \$ 23,525.00

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

PROFESSIONAL SERVICES CONTRACT 2014-2015

This Agreement is entered into between Bright Research Group

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

- Services:** CONTRACTOR shall provide the ("Services" or "Work") as described in **Exhibit "A,"** attached hereto and incorporated herein by reference.
- Terms:** CONTRACTOR shall commence work on 09/01/2014, 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 6/30/2015.
- Compensation:** OUSD agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this Agreement. The compensation under this Contract shall not exceed Twenty-three thousand five hundred twenty-five Dollars (\$ 23,525.00) [per fiscal year], at an hourly billing rate not to exceed \$ 70.00 per hour. This sum shall be for full performance of this Agreement and includes all fees, costs, and expenses incurred by Contractor including, but not limited to, labor, materials, taxes, profit, overhead, travel, insurance, subcontractor costs, and other costs.

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

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

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

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

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

5. CONTRACTOR Qualifications / Performance of Services:

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

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

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

OUSD Representative:

Name: Michelle Oppen
Site /Dept.: 922/Community Schools and Student Services
Address: 746 Grand Avenue, Room 14
Oakland, CA 94610
Phone: 510-273-151676
Email: michelle.oppen@ousd.k12.ca.us

CONTRACTOR:

Name: Brightstar Ohlson
Title: CEO/Principal
Address: 660 13th Street, Suite 202
Oakland CA 94612
Phone: 510-238-9948 ext. 1
Email: bolhson@brightresearchgroup.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

Professional Services Contract

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

[Handwritten Signature]

- President, Board of Education
- Superintendent or Designee

[Handwritten Signature]

Secretary, Board of Education

CONTRACTOR

[Handwritten Signature]

Contractor Signature

Brightstar Ohlson CEO/Principal

Print Name, Title

Form approved by OUSD General Counsel for 2014-15 FY

File ID Number: 14-1882
Introduction Date: 11/5/14
Enactment Number: 14-1878
Enactment Date: 11/5/14
By: *[Signature]*

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.

Bright Research Group will create tools, provide analysis, and reports and technical assistance in order to strengthen and sustain the evaluation of the OUSD Wellness Champion Program.

Bright Research Group will:

1. Design quarterly activity log in online survey format and analyze quarterly.
2. Develop end of year tool/inventory and analyze.
3. Integrate items from the Alliance for Healthier Generation index into online format for all schools within OUSD without wellness champions; analyze and compare results.
4. Lead focus groups with focus area leads.
5. Conduct focus group or key informant interviews with after school wellness learning community participants and report results.
6. Develop logic model for the school wellness program/wellness champion program.
7. Develop final report with evaluation results and recommendations.
8. Provide coordination and technical assistance.

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.

Wellness Policy Inventory and Wellness Champion Evaluation:

1. School wellness policies, practices and programs will be assessed to identify gaps and barriers to learning, so the students can participate more fully in school.
2. The assessment will identify existing and lacking resources so that an equitable distribution can take place and encourage more children to attend school.
3. The results of the assessment will help to increase access to nutrition, physical education, and medical health education and youth development services.

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

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

BRIGHTSTAR OHLSON
660 13th Street, Suite 202 Oakland, CA 94612
bohlson@brightresearchgroup.com
(510) 238-9948

Professional Experience

2010-Present **CEO and Principal**, Bright Research Group Inc., Oakland, CA

- Manage evaluation, applied research, project design, and community planning projects for publicly funded organizations and agencies to strengthen their effectiveness. Design evaluations for multi-site initiatives; manage data collection, and analyze data; prepare reports for funders, city council, community members, and other stakeholders. Provide evaluation coaching and technical assistance to agencies and non-profit organizations.
- Manage business operations and administration. Oversee contracts with subcontractors to meet project deliverables within budget and according to project standards.

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| Alameda County Health Care Services Agency: Connecting Kids to Coverage Project | Evaluator (2014- present) |
| San Francisco Public Health Department: Tobacco Free Project Evaluation | Evaluator (2014- present) |
| Oakland Unified School District: Wellness Program Evaluation & Technical Assistance | Evaluator (2014- present) |
| Propel Next and Edna McConnell Clark Foundation (with Leadwell Partners) | Capacity Building & TA with Evaluation (2014- present) |
| Alameda County Behavioral Health Care Services Early Connections: Full Partnership Facilitation and Co-Learning Evaluation funded by SAMHSA | Facilitator and Evaluator (2011- Present) |
| Atlantic Philanthropies (with Safe Passages): Elev8 Oakland Local Evaluation | Lead Evaluator (2012- Present) |
| City of Oakland: Measure Y Violence Prevention Program (30 site evaluation) and Community Policing Evaluation | Lead Evaluator (2008-Present) |
| San Mateo County Health Department: Tobacco Education Coalition Evaluation | Lead Evaluator (2010- Present) |
| Urban Habitat | Fund Development (2013) |
| Richard Heath & Associates: Project Design CA Affordable Care Act Implementation | Lead Project Design and Strategy Manager, (2012-2014) |
| City of Oakland: Oakland Fund for Children & Youth Task Force Facilitation for Strategic Plan | Facilitator (2011- 2012) |

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| City of Oakland: Workforce Investment Board Community Input on RFP Development | Facilitator (2012) |
| California Health Benefit Exchange (with Richard Heath & Associates): Program Design for Outreach & Assistance Program for the Affordable Care Act | Lead Program Design & Strategy Manager (2012- 2014) |
| Head Start Council of San Joaquin County Strategic Plan (with Rane Community Development) | Strategic Planner (2011) |
| San Joaquin County Mental Health Full Services Partnership Evaluation of Client Outcomes (with Rane Community Development) | Evaluator (2010-11) |
| Safe Passages Elev8 Extended Learning Program Evaluation | Evaluator (2009-10) |
| City of Oakland Neighborhood Services Department: Evaluation of Weed & Seed Initiative | Evaluator (2010-11) |
| Grant Writer: including Safe Passages, Richard Heath & Associates, and San Mateo County | Grant Writer (2010-Present) |

2005-2011 **Senior Associate, Community, Research & Evaluation**, Gibson & Associates, Oakland, CA

- Managed a wide range of public health, education, youth development, and public safety projects throughout the Bay Area. Conducted planning processes to develop grant proposals and draft proposals for federal and state grants. Designed and implemented community input phases of community planning and evaluation projects. Developed qualitative and quantitative data collection protocols. Created coding system, analyzed quantitative and qualitative data, and produced written reports of results. Conducted best practice research, develop rubrics, create recommendations and present findings. Develop proposals and supervise staff. Key projects include:

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| Alameda County Behavioral Health Care Services Family Education & Resource Center | Project Manager & Strategic Planner (2007) |
| California Endowment Increasing Health Professions' Work Force Diversity | Lead Researcher K-12 Programs & Initiatives (2007-2008) |
| City of Irvine, Strategic Plan for Children, Youth and Families | Lead Strategic Planner (2007-2008) |
| City of Oakland Public Works Agency Audit | Evaluator (2008) |
| Environmental Health & Justice Initiative Evaluation The San Francisco Foundation | Evaluator (2005) |
| City of Oakland, Measure Y Initiative Evaluation | Lead Evaluator (2008 – 2010) |
| Oakland Fund for Children & Youth | Strategic Planner (2009) |

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| Oakland Unified School District Program Improvement Audit | Evaluator (2005; 2007) |
| San Mateo County Health Department Linguistic Access Study | Lead Researcher (2005-2006) |
| San Mateo County Health Department, Health Policy & Planning Unit Assessment | Lead Evaluator (2008) |
| San Mateo County Sheriff's Office Mental Health Criminal Justice Collaboration Grant | Grant Writer (2007) |
| San Mateo County Mental Health Services Act Planning | Researcher (2005- 2010) |
| San Mateo County Sheriff's Office/Mentally Ill Offender Crime Reduction Grant | Grant Writer/Technical Assistance (2007-2008) |
| San Mateo County Tobacco Prevention Programs | Lead Evaluator (2007 – 2010) |
| Service Employees International Union Local 1021 | Strategic Planner (2008 – 2009) |

2000-2004 **Project Director** University of California San Francisco, San Francisco, CA
 Coordinated five year, federally funded NIH grant on adolescent health and relationships at University of California, San Francisco. Secured research sites in Oakland, conducted qualitative interviews in English and in Spanish, analyzed data, trained coders, and prepared articles for publication. Also conducted qualitative interviews for research study on maternal caregiving in English and Spanish.

1999-2000 **Bilingual 6th Grade Teacher** Oakland Unified School District ,Oakland, CA
 Taught English Language Development, Spanish for Spanish Speakers, and Social Studies in English and Spanish at Roosevelt Middle School.

1998-1999 **2/3rd Grade Teacher** Cold Spring School, New Haven, CT
 Taught 2/3rd grade and after school program.

1992-1998 **Senior Counselor/Staff Development Coordinator** LEAP, New Haven, CT
 Served as a counselor to urban youth in New Haven for after school and summer enrichment program. Developed and implemented staff trainings.

Published Reports & Articles

- “2009-10 Evaluation of Elev8 Academic Support Programs” 2011
- “San Mateo County Tobacco Education Coalition Final Evaluation Report” 2010
- “Measure Y Violence Prevention Initiative Mid Year Report” 2010
- “Measure Y Violence Prevention Initiative Evaluation” 2009; 2010
- “Service Employees International Union Local 1021 Vision & Bylaws” 2009
- “City of Irvine Strategic Plan for Children, Youth & Families” 2008
- “Health Policy & Planning Unit Assessment Summary of Findings” 2008

“Family Education & Resource Center Operations Plan” 2007
“Mentally Ill Offender Crime Reduction Grant Proposal” 2006 and 2008
“Mental Health Criminal Justice Collaboration Grant Proposal” 2006
“K-12 Networks of Support to Increase Health Professions’ Workforce Diversity” 2007
“Linguistic Access Study, Summary of Findings & Recommendations” 2006
“Linguistic Access to Health Care: Best Practices” 2006
“San Mateo County Mental Health Services Act: Summary of Community Input” 2005
“Analyzing Cultural Models in Adolescent Accounts of Romantic Relationships, Journal of Research on Adolescence.” May 19, 2009. Milbrath, Ohlson & Eyre.

Education

2001 Post-baccalaureate Certificate, Pre-Medicine, Mills College,
1998 Masters of Science, Education, University of New Haven
1996 Bachelors of Arts, Anthropology, Yale University

Awards

Americorps Educational Award
Cahoon Prize for Public Service
J.W. Saxe Prize for Public Service

Other Skills & Qualifications

Bilingual in English & Spanish
Final Candidate, California Citizen’s Redistricting Commission: one of 36 candidates eligible to serve on the commission, out of an initial applicant pool of over 20,000.
Proficient in Microsoft Office Suite

SAM Search Results
List of records matching your search for :

Search Term : Bright* Research* Group*
Record Status: Active

| | | |
|-------------------------------------|-----------------------------------|-------------------------------------|
| ENTITY | BRIGHT RESEARCH GROUP INC | Status:Active |
| DUNS: 053376363 | +4: | CAGE Code: 75ZL1 DoDAAC: |
| Expiration Date: Jul 9, 2015 | Has Active Exclusion?: No | Delinquent Federal Debt?: No |
| Address: 660 13th St Ste 202 | | |
| City: OAKLAND | State/Province: CALIFORNIA | |
| ZIP Code: 94612-1030 | Country: UNITED STATES | |



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
09/11/2014

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).

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| PRODUCER STATE FARM INSURANCE AGENT JESSICA HEBERT 490 GRAND AVE STE 210 OAKLAND, CA 94610 | CONTACT NAME: JESSICA HEBERT, AGENT PHONE (A/C No. Ext): 510-653-2900 FAX (A/C No.): 510-653-2909 E-MAIL ADDRESS: JESSICA.HEBERT.P2VB@STATEFARM.COM | |
| | INSURER(S) AFFORDING COVERAGE NAIC # INSURER A: State Farm General Insurance Company 26151 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F: | |
| INSURED BRIGHT RESEARCH GROUP INC 660 13TH ST STE 202 OAKLAND, CA 94612 | | |

COVERAGES **CERTIFICATE NUMBER:** **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 INSD WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS |
|-------------------------------------|---|-------------------------------------|---------------|-------------------------|-------------------------|--|
| <input checked="" type="checkbox"/> | COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER | | 97-B4-X105-0 | 02/15/2014 | 02/15/2015 | EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/OP AGG \$ 2,000,000 \$ COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ |
| | AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS | | | | | EACH OCCURRENCE \$ AGGREGATE \$ \$ |
| | UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$ | | | | | EACH OCCURRENCE \$ AGGREGATE \$ \$ |
| | 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 <input type="checkbox"/> N/A | 97-BT-A046-6 | 04/01/2014 | 04/01/2015 | <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000 |

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

| | |
|---|---|
| CERTIFICATE HOLDER OAKLAND UNIFIED SCHOOL DISTRICT 746 GRAND AVE OAKLAND, CA 94610 | 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. J. HEBERT 05-3417 FIRE 57 |
| | AUTHORIZED REPRESENTATIVE EAST BAY AFO F166 |

PROFESSIONAL SERVICES CONTRACT ROUTING FORM 2014-2015

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 type="checkbox"/> | For individual consultants: HRSS Pre-Consultant Screening Letter for the current fiscal year. |
| | <input type="checkbox"/> | For individual consultants: Proof of negative tuberculosis status within past 4 years. |
| | <input type="checkbox"/> | For All Consultants: Results page of the Excluded Party List (https://www.sam.gov/) |
| | <input type="checkbox"/> | For All Consultants: Statement of qualifications (organization); or resume (individual consultant). |
| | <input type="checkbox"/> | For All Consultants: Proof of Commercial General Liability insurance naming OUSD as an Additional Insured. |
| | <input 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) Renee.McMearn@ousd.k12.ca.us

Contractor Information

| | | | | | |
|--------------------|---|------------------|---|-------|--------------|
| Contractor Name | Bright Research Group | Agency's Contact | Brightstar Ohlson | | |
| OUSD Vendor ID # | 1006431 | Title | CEO/Principal | | |
| Street Address | 660 13th Street, Suite 202 | City | Oakland | State | CA Zip 94612 |
| Telephone | 510-238-9948 ext. 1 | Email (required) | bolhson@brightresearchgroup.com | | |
| Contractor History | Previously been an OUSD contractor? <input type="checkbox"/> Yes <input checked="" 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 | 09/01/2014 | Date work will end | 6/30/2015 | Other Expenses | |
| Pay Rate Per Hour (required) | \$ 70.00 | Number of Hours (required) | 336 | | |

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 |
|-----------------------------------|---------------|------------|------------------------------|--------------|
| 9225 | Kaiser-H&W | 9221211121 | 5825 | \$ 14,680.60 |
| 9225 | Kaiser-H&W | 9221211120 | 5825 | \$ 8,844.40 |
| | | | 5825 | |
| Requisition No. (required) | R0151099 | | Total Contract Amount | \$ 23,525.00 |

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/>)

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|--|--|--|------------------------------|---------------|----------------|
| 1. | Administrator / Manager (Originator) | Name | Michelle Oppen | Phone | 510-273-151676 |
| | Site / Department | 922/Community Schools and Student Services | | Fax | 510-273-1511 |
| | Signature | <i>Michelle Oppen</i> | | Date Approved | 9/2/14 |
| 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"/> Scope of work indicates compliant use of restricted resource and is in alignment with school site plan (SPSA) | | | | |
| | Signature | <i>Jhol</i> | | Date Approved | 9/15/14 |
| 3. | Regional Executive Officer | | | | |
| | <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 | | | | |
| 4. | Signature | | <i>Christina Lopez</i> | | Date Approved |
| | Deputy Superintendent Instructional Leadership / Deputy Superintendent Business Operations Consultant Aggregate Under <input type="checkbox"/> , Over <input type="checkbox"/> \$50,000 | | | | |
| | Signature | | <i>Deputy Superintendent</i> | | Date Approved |
| 5. | Superintendent, Board of Education Signature on the legal contract | | | | |
| Legal Required if not using standard contract | | Approved | Denied - Reason | Date | |
| Procurement | Date Received | PO Number | | P1502376 | |