

Board Office Use: Legislative File Info.	
File ID Number	16-2202
Introduction Date	11/30/16
Enactment Number	16-1844
Enactment Date	11/30/16



**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)

11/30/16

**Subject** Professional Services Contract - Board of Trustees, Leland Stanford Junior University  
- 922/Community Schools & Student Services Department (site/department)

**Action Requested** Approval of professional services contract between Oakland Unified School District and Board of Trustees, Leland Stanford Junior University. Services to be primarily provided to 922/Community Schools & Student Services Department for the period of 07/01/2016 through 06/30/2019.

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

The John W. Gardner Center for Youth and Their Communities at Stanford University will conduct a three-year multi-method study examining early outcomes and on-going implementation of OUSD's Full Service Community Schools (FSCS) initiative. The scope of work covers Phase IV of the evaluation to establish a clear description and shared understanding among stakeholders about the District's Full Service Community Schools' intended mission, vision, target audience, and outcomes. The Phase IV work will help guide District leaders' efforts to scale-up and select appropriate implementation strategies to achieve OUSD's long-term ambition to become the nation's first full-service community school district.

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

Approval by the Board of Education of a Professional Services Contract between the District and the Board of Trustees of the Leland Stanford Junior University, Palo Alto, CA, on behalf of the John W. Gardner Center for Youth and Their Communities, for the latter to conduct Phase IV - A Study of Early Outcomes and Implementation of Full Service Community Schools in the District, as described in the Scope of Work, incorporated herein by reference as though fully set forth, for the Community Schools and Student Services Department, for the period of July 1, 2016 through June 30, 2019, in an amount not to exceed \$100,000.00.

**Recommendation** Approval of professional services contract between Oakland Unified School District and Board of Trustees, Leland Stanford Junior University. Services to be primarily provided to 922/Community Schools & Student Services Department for the period of 07/01/2016 through 06/30/2019.

**Fiscal Impact** Funding resource name (please spell out) 5848/Full Service Community Schools and 9225/Kaiser Health and Wellness not to exceed \$ 100,000.00

**Attachments**

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



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

**Legislative File ID No.** 16-2202

**Department:** 922/Community Schools and Student Services Department

**Vendor Name:** Board of Trustees of the Leland Stanford Junior University

**Contract Term:** Start Date: 07/01/2016 End Date: 06/30/2019

**Annual Cost:** \$ 100,000.00

**Approved by:** Andrea Bustamante

**Is Vendor a local Oakland business?** Yes ☐ No ☒

**Why was this Vendor selected?**

The John W. Gardner Center for Youth and Their Communities at Stanford University will conduct a three-year multi-method study examining early outcomes and on-going implementation of OUSD's Full Service Community Schools (FSCS) initiative. The scope of work covers the evaluation to establish a clear description and shared understanding among stakeholders about the District's Full Service Community Schools' intended mission, vision, target audience, and outcomes. The project work will help guide District leaders' efforts to scale-up and select appropriate implementation strategies to achieve OUSD's long-term ambition to become the nation's first full-service community school district.

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

The Board of Trustees of Stanford University on behalf of the John W. Gardner Center for Youth and Their Communities, for the latter to conduct Phase IV of their project, 'A Study of Early Outcomes and Implementation of Full Service Community Schools' in the District.

**Was this contract competitively bid?** Yes ☐ No ☒

If No, answer the following:

1) How did you determine the price is competitive?

The project work in phases will help guide District leaders' efforts to scale-up and select appropriate implementation strategies to achieve OUSD's long-term ambition to become the nation's first full-service community school district.

2) Please check the competitive bid exception relied upon:

- ☐ **Educational Materials**
- ☒ **Special Services** contracts for financial, economic, accounting, legal or administrative services
- ☐ **CUPCCAA exception** (Uniform Public Construction Cost Accounting Act)
- ☐ **Professional Service Agreements** of less than \$87,800 (increases a small amount on January 1 of each year)
- ☐ **Construction related Professional Services** such as Architects, DSA Inspectors, Environmental Consultants and Construction Managers (require a "fair, competitive selection process)
- ☐ **Energy** conservation and alternative energy supply (e.g., solar, energy conservation, co-generation and alternate energy supply sources)
- ☐ **Emergency** contracts [requires Board resolution declaring an emergency]
- ☐ **Technology** contracts
  - ☐ electronic data-processing systems, supporting software and/or services (including copiers/printers) over the \$87,800 bid limit, must be competitively advertised, but any one of the three lowest responsible bidders may be selected
  - ☐ contracts for computers, software, telecommunications equipment, microwave equipment, and other related electronic equipment and apparatus, including E-Rate solicitations, may be procured through an RFP process instead of a competitive, lowest price bid process
  - ☐ Western States Contracting Alliance Contracts (WSCA)
  - ☐ California Multiple Award Schedule Contracts (CMAS) [contracts are often used for the purchase of information technology and software]
- ☐ **"Piggyback" Contracts** with other governmental entities
- ☐ **Perishable Food**
- ☐ **Sole Source**
- ☐ **Change Order for Material and Supplies** if the cost agreed upon in writing does not exceed ten percent of the original contract price
- ☐ **Other, please provide specific exception**



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**OAKLAND UNIFIED  
SCHOOL DISTRICT**  
Community Schools, Thriving Students

## PROFESSIONAL SERVICES CONTRACT 2016-2017

This Agreement is entered into between Board of Trustees, Leland Stanford Junior University (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 07/01/2016, or the day immediately following approval by the Superintendent if the aggregate amount CONTRACTOR has contracted with the District is below \$ 87,800 in the current fiscal year; or, approval by the Board of Education if the total contract(s) exceed \$ 87,800, whichever is later. The work shall be completed no later than 06/30/2019.
- Compensation:** OUSD agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this Agreement. The compensation under this Contract shall not exceed One Hundred Thousand Dollars ( \$ 100,000.00 ) [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: 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: Ali MetzlerSite /Dept.: 922/Community Schools & Student Services DepartmentAddress: 1000 Broadway, Suite 150Oakland CA 94607Phone: (510) 879-2820Email: andrea.bustamante@ousd.org**CONTRACTOR:**Name: Catherine BoxwellTitle: Senior Contract and Grant OfficerAddress: 3145 Porter DrivePalo Alto CA 94304Phone: (650) 725-6864Email: boxwell@stanford.edu

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



Professional Services Contract

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

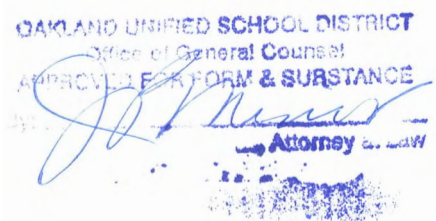
Contractor Signature

Nicole K. Pobuta

Contract and Grant Officer

Print Name, Title

Form approved by OUSD General Counsel for 2016-17 FY



## 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.

At the request of district leaders in the Oakland Unified School District (OUSD), the John W. Gardner Center for Youth and Their Communities (Gardner Center) at Stanford University is conducting a three-year, multi-method study examining early outcomes and on-going implementation of OUSD's Full-Service Community Schools (FSCS) initiative.

The present scope of work covers the twelve-month period between July 2016 and June 2017 (Phase IV).

In the Phase IV work, OUSD and the Gardner Center will develop an appropriate research design and detailed work plan for assessing early system-, school-, and student-level outcomes. As well, our work will help guide district leaders' efforts to scale-up and select appropriate implementation strategies to achieve OUSD's long-term ambition to become the nation's first full-service community school district.

To accomplish our Phase IV activities, Gardner Center staff will work closely with OUSD's Family, Schools, and Community Partnership department on the following tasks:

- Collect, organize, clean, and analyze administrative data from OUSD and from partners related to the full-service community school model(s) currently in place.
- Design research examining student and school-level outcomes for OUSD full-service community schools.
- Design qualitative research instruments (e.g., surveys and interview protocol).
- Collect qualitative site-level data from OUSD full-service community schools (e.g. interviews and focus groups with teachers, students, families and staff).
- Execute data use agreements with partners as needed.
- Produce report and PowerPoint presentation with key findings to share with stakeholder groups.



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.

Phase IV of the Full Service Community School Evaluation will help guide the District's efforts to scale-up and select appropriate implementation strategies to achieve long-term ambition to become the nation's first full-service community school district.

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 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 type="checkbox"/> Accountable for quality                             |
| <input 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.

### **Addendum to the Professional Services Contract**

Professional Services Contract between the Oakland Unified School District and the Board of Trustees, Leland Stanford Junior University, for the Full Service Community Schools (FSCS) Initiative Evaluation: Phase IV

8. Please modify the clause to read:  
“Invoices shall include, but not be limited to: Consultant names, consultant address, invoice date, invoice sequence number, purchase order number, name of school or department service was provided to, period of service, brief description of services provided, and current and cumulative charges.” It will also include a certification reading, ‘I hereby affirm that the above bill is correct and just, and that payment thereof has not been received.’ – signed by an official of the University.
13. Anti-Discrimination.  
Please remove the language requiring Stanford to comply with OUSD policy. Stanford’s anti-discrimination policy should cover all the bases, and we don’t know the OUSD policy.
15. Indemnification. Please modify this clause to read:  
OUSD will indemnify, defend, and hold harmless Contractor, their respective trustees, directors, employees, agents, volunteers, subcontractors, and students (“Indemnitees”) from any liability, damage, loss, or expense (including reasonable attorneys’ fees and expenses of litigation) incurred by or imposed upon the Indemnitees or any one of them in connection with any claims, suits, actions, demands, or judgments arising out of or connected with this Agreement or the research done under this Agreement, except to the extent that the liability is due to the negligence and willful misconduct of Contractor. Contractor will promptly notify OUSD of any claim and will cooperate with OUSD in the defense of the claim. OUSD will defend against any claim with respect to which OUSD has agreed to indemnify Contractor. This indemnity will not be deemed excess coverage to any insurance or self-insurance Contractor may have covering a claim. OUSD’s indemnity will not be limited by the amount of OUSD’s insurance. The provisions of this clause will survive termination of this Agreement.
16. Copyright/Trademark/Patent/Ownership.  
Please delete this clause in its entirety and substitute the following:  
OUSD agrees that Contractor shall own the entire right, title, and interest, including all patents, copyrights, and other intellectual property rights, in and to all tangible materials, inventions, works of authorship, software, information and data solely conceived or developed by Contractor in the performance of the project and developed using Contractor’s facilities and personnel (“Contractor Technology”). Contractor agrees that OUSD shall own the entire right, title, and interest, including all patents, copyrights, and other intellectual property rights, in and to all tangible materials, inventions, works of authorship, software, information and data solely conceived or developed by OUSD personnel and using OUSD facilities under this Agreement (“OUSD



Technology"). Technology that is jointly developed by Contractor and OUSD personnel, or developed solely by Contractor but involving more than incidental use of OUSD's facilities, shall be jointly owned ("Joint Technology").

Contractor shall grant to OUSD an irrevocable, royalty-free, non-transferable, non-exclusive right and license to use, reproduce, make derivative works, display, and perform publicly any copyrights or copyrighted material (including any computer software and its documentation and/or databases) first developed and delivered under this Agreement, for non-commercial, academic, or research purposes.

18. Termination. Please revise to read:  
In the event of termination OUSD will pay for costs incurred and non-cancelable commitments through the date of termination. Upon termination, Contractor shall make all reasonable efforts to mitigate costs. Contractor will furnish all necessary reports of research completed or in progress through the date of termination.
19. Conduct of Consultant.  
Please identify the Consultant as Prof. Prudence Carter as this language applies to her and her staff. I cannot sign on behalf of the whole University signifying compliance. It would be better if there were a separate agreement covering this.
22. Limitation of OUSD Liability.  
Please delete this clause in its entirety.
23. Confidentiality.  
Again, this would be better covered in a separate agreement between OUSD and the Consultant.
24. Conflict of Interest.  
Stanford can only comply with its own policies around conflict of interest. We agree to be subject to regulations, statutes or other laws regarding conflict of interest, but we cannot agree to be bound by OUSD's policies.
26. Litigation.  
Please change the title of this clause to "Governing Law" and modify it to read "This agreement is governed by the laws of the State of California, without regard to its conflict of laws doctrine. Any legal action involving this Agreement will be adjudicated in the State of California."



OUSD or the District verifies that the Contractor does not appear on the Excluded Parties List at <https://www.sam.gov/>

# scope of work

July 2016 – June 2017

## PHASE IV – FULL-SERVICE COMMUNITY SCHOOLS IN THE OAKLAND UNIFIED SCHOOL DISTRICT

### Background

At the request of district leaders in the Oakland Unified School District (OUSD), the John W. Gardner Center for Youth and Their Communities (Gardner Center) at Stanford University is conducting a three-year, multi-method study examining early outcomes and on-going implementation of OUSD's Full-Service Community Schools (FSCS) initiative. The present scope of work covers the twelve-month period between July 2016 and June 2017 (Phase IV). Our analysis during this phase of the project will be informed by lessons learned in Phase III where we studied the implementation of the full-service community schools model at a sample of schools to better understand the experiences and perspectives of multiple school and community stakeholders.

In the Phase IV work, OUSD and the Gardner Center will develop an appropriate research design and detailed work plan for assessing early system-, school-, and student-level outcomes. As well, our work will help guide district leaders' efforts to scale-up and select appropriate implementation strategies to achieve OUSD's long-term ambition to become the nation's first full-service community school district.

To accomplish our Phase IV activities, Gardner Center staff will work closely with OUSD's Family, Schools, and Community Partnership department on the following tasks:

- Collect, organize, clean, and analyze administrative data from OUSD and from partners related to the full-service community school model(s) currently in place.
- Design research examining student and school-level outcomes for OUSD full-service community schools.
- Design qualitative research instruments (e.g., surveys and interview protocol).
- Collect qualitative site-level data from OUSD full-service community schools (e.g. interviews and focus groups with teachers, students, families and staff).
- Execute data use agreements with partners as needed.
- Produce report and PowerPoint presentation with key findings to share with stakeholder groups.



## Deliverables and Timeline

Based on the activities outlined above, the Gardner Center proposes to develop and disseminate three deliverables during this 12 month period:

1. A report in which we will document findings for OUSD.
2. A PowerPoint presentation through which we will synthesize early findings to share and discuss with initiative leaders and other stakeholders as appropriate
3. A work plan for Phase V of the Study.

With the current \$100,000 budget we propose the following research timeline:

Timeline	Activity
September 2016	<ul style="list-style-type: none"><li>• Develop research plan with input from OUSD</li><li>• Conduct background review of relevant literature</li><li>• Execute DUAs with additional partners</li></ul>
October 2016	<ul style="list-style-type: none"><li>• File IRB with Stanford University</li><li>• Hold meetings with new partners</li><li>• Design qualitative study research instruments</li><li>• Continue to review and clean data from partners</li><li>• Begin to process data</li><li>• Conduct participant observation as appropriate</li></ul>
November 2016	<ul style="list-style-type: none"><li>• Finalize protocols and begin qualitative interviews and data collection</li><li>• Continue collecting quantitative data</li><li>• Continue developing DUA process with relevant OUSD partner organizations</li></ul>
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*\*Key informant interviews and data request processes may shift the proposed timeline. Further, we note that deliverables and timeline may be altered with approval from OUSD based on the detailed plan developed with input from OUSD.*



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
10/25/2016

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).

<b>PRODUCER</b> MARSH RISK & INSURANCE SERVICES 345 CALIFORNIA STREET, SUITE 1300 CALIFORNIA LICENSE NO. 0437153 SAN FRANCISCO, CA 94104  025193-STND-GAWUF-16-17	<b>CONTACT NAME:</b> <b>PHONE (A/C, No, Ext):</b> <b>E-MAIL ADDRESS:</b> <b>FAX (A/C, No):</b>  <b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> United Educators Ins Risk Ret. Grp. <b>INSURER B:</b> American Zurich Insurance Co. <b>INSURER C:</b> N/A <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>	<b>NAIC #</b> 10020 40142 N/A
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<b>COVERAGES</b>	<b>CERTIFICATE NUMBER:</b> SEA-002674554-30	<b>REVISION NUMBER:</b> 6
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.		

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			SEE ATTACHED			EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> <b>EXCESS LIAB</b> DED <input checked="" type="checkbox"/> RETENTION \$2,000,000			GLX201600105900	09/01/2016	09/01/2017	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> N	N/A	WC829845216 (DED) WC829827313 (RETRO)	09/01/2016 09/01/2016	09/01/2017 09/01/2017	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 2,000,000 E.L. DISEASE - EA EMPLOYEE \$ 2,000,000 E.L. DISEASE - POLICY LIMIT \$ 2,000,000

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

Certificate is issued for the duration of the Full Service Community Schools Research - Phase 1 of the Stanford University Office of Sponsored Research Project: SPO #: 115108 titled: Oakland Community Schools Evaluation. It is estimated the term of the res. project is for July 1, 2016 through June 30, 2017.

Oakland Unified School District, its officers, agents and employees are additional insured under the umbrella liability policy where required by written contract. The umbrella policy applies in excess of the underlying general liability self-insured retention

<b>CERTIFICATE HOLDER</b> OAKLAND UNIFIED SCHOOL DISTRICT 900 HIGH STREET OAKLAND, CA 94601	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE of Marsh Risk & Insurance Services Paul Nagata
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# ADDITIONAL REMARKS SCHEDULE

<b>AGENCY</b> MARSH RISK & INSURANCE SERVICES		<b>NAMED INSURED</b> THE BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY, ET AL. C/O RISK MANAGEMENT DEPARTMENT 215 PANAMA STREET, BLDG D JUNIPER MODULAR STANFORD, CA 94305
<b>POLICY NUMBER</b>		
<b>CARRIER</b>	<b>NAIC CODE</b>	
<b>EFFECTIVE DATE:</b>		

## ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,  
 FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance

CONTINUED FROM DESCRIPTION SECTION:

GENERAL LIABILITY IS SELF-INSURED FOR \$2,000,000 EACH OCCURRENCE. AUTOMOBILE LIABILITY IS SELF-INSURED FOR \$1,000,000 EACH ACCIDENT.



**Lynn Heimerle**

Client Representative  
Marsh Risk & Insurance Services  
345 California Street, Suite 1300  
San Francisco, CA 94104-2679  
California Insurance License #0437153  
+1 415 743 8000  
lynn.heimerle@marsh.com  
www.marsh.com

September 1, 2016

**Subject:** Additional Insured

To Whom It May Concern:

It is our understanding that you have made a request for an additional insured endorsement naming your organization as an additional insured. The liability insurer for Stanford University automatically includes any person or organization as an additional insured if there is a requirement to do so in a written contract in force between Stanford University and that person or organization. This wording is found within the Excess Liability coverage form that is contained within Stanford University's insurance policy.

Attached is an excerpt of the coverage form that contains this automatic grant of additional insured status for your review. We trust that upon review of this wording you will agree that a custom endorsement naming your organization is not required as the policy automatically grants your organization additional insured status if required by written contract.

Sincerely,

Lynn Heimerle  
Client Representative



- d. any not-for-profit entity acquired or formed by or merged with an **Included Entity** during the **Policy Period** provided that
- (1) the value of the sum of all assets (including, but not limited to, real estate, securities, assumed indebtedness and other consideration) expended, assumed or exchanged for any such acquisition, formation or merger does not exceed 5% of the total assets of the **Educational Organization** and its consolidated subsidiaries and affiliates as most recently reported to us for rating purposes prior to such **Policy Period**;
  - (2) the combined or consolidated operations and the acquired, formed or merged entity are not materially different from those of the **Included Entity** prior to the acquisition, formation or merger;
  - (3) coverage with respect to that newly formed, acquired or merged entity will begin on the date of acquisition, formation or merger, and there is no coverage for any entity acquired by or merged into the **Included Entity** or for any person with respect to that entity for **Occurrences** happening prior to the date of acquisition or merger; and
- e. In addition to coverage provided in Item d. listed above, any newly formed, acquired or merged affiliates of the **Educational Organization**, shall be added as **Included Entities** to this Policy as of the effective date of their formation, incorporation or acquisition by the **Educational Organization**, provided
- (1) they are reported to us within sixty (60) days of the date of their formation, incorporation or acquisition by the **Educational Organization** and
  - (2) are subsequently accepted for coverage by us and named on the Policy.

**Included Entity's Products** means goods or products manufactured, sold, tested, handled, or distributed by an **Included Entity** or others trading under its name or materials that were the subject of completed or abandoned operations of the **Included Entity**.

*af* **Insured means:**

- a. the **Included Entities**;
- b. any past, present or future trustees, governing board directors or **Officers** of an **Included Entity** while acting within the scope of their duties on behalf of that **Included Entity**; the estates, heirs, legal representatives or assigns of deceased, incompetent, insolvent or bankrupt trustees, governing board directors, or **Officers**; and spouses or domestic partners of governing board directors or trustees to the extent they are involved in **Claims** solely because of their status as spouses or domestic partners;
- c. at the option of the **Educational Organization**, any
  - (1) past, present and future employee, member of the faculty, student teacher, or teaching assistant of an **Included Entity**;
  - (2) member of a committee, including an Institutional Review Board (as recognized by the U.S. Food and Drug Administration and U.S. Department of Health and Human Services) of an **Included Entity**, or a representative to an education association of which the **Educational Organization** is a member;
  - (3) uncompensated volunteer worker performing services on behalf and with the express direction and authority of an **Included Entity**;
  - (4) student of an **Educational Organization** while serving in a supervised internship program in satisfaction of course requirements; or
  - (5) student of an **Educational Organization** while acting at the direction of, complying with policies and procedures governing conduct at, or performing services primarily for or on behalf of, the **Educational Organization**;but only while acting within the scope of their duties or obligations in their respective capacities to an **Included Entity** as described in clause a. or b. above, and coverage for these individuals is subject always to all other terms and conditions of this Policy;
- d. any person legally responsible for the use of an **Automobile** owned, rented, leased, borrowed, hired or used by an **Included Entity** with its express permission; but **Insured** under this Paragraph d. does not include:

- (1) any person or organization's (other than an **Included Entity's**) agent or employee, operating an **Automobile** repair shop, public garage, sales agency, service station, or public parking place, with respect to any **Occurrence** arising out of the operation thereof; or
- (2) the owner or any permissive user of the owner of an **Automobile** that is not owned by an **Included Entity**; however, at the request of the **Educational Organization**, we will deem as an **Insured**
  - (i) an employee of an **Included Entity** for liability arising out of the use of his or her personal **Automobile** in the business of that **Included Entity** on behalf of and with the express permission of that **Included Entity**; or
  - (ii) any person who rents or leases **Automobiles** on behalf of and with the express permission of the **Included Entity**, but only while acting within the scope of their duties or obligations in the respective capacities to an **Included Entity**;
- e. except with respect to the use or operation of an **Automobile**, any person or organization to whom any **Included Entity** is obligated by virtue of a contract or agreement to provide liability insurance such as is afforded by this Policy, but only
  - (1) to the extent of such obligation;
  - (2) for operations (other than commercial insurance operations) by or on behalf of that **Included Entity** or operation of facilities of that **Included Entity** or use of facilities by that **Included Entity**; and
  - (3) if the contract or agreement is made prior to a covered **Occurrence**; and
- f. **Automobile** dealerships and leasing corporations that own **Automobiles** which are leased or loaned to an **Included Entity** but only for liability arising out of the activities of the **Included Entity's** employees.

**Limit of Liability** means the maximum amounts that are provided by this Policy to pay **Damages**, respectively, for each **Occurrence** and, where applicable, in the aggregate for all **Occurrences** during the **Policy Period** as stated in Items 2(a) and (b) of the **Declarations**.

**Medical Services** means any acts that may be legally performed only by a physician, nurse or other licensed medical professional within the scope of his/her medical license, regardless of whether the person is licensed or not. However, the application of **First Aid** shall not be considered **Medical Services**.

**Model aircraft** means a non-human carrying device capable of sustained flight in the atmosphere which has a flight weight of 100 pounds or less (flight weight includes the weight of the aircraft itself, fuel and other fluids, and all payload) used for research and/or educational purposes; but, model aircraft does not include any rocket or missile.

**Non-Flight Curriculum-Related Instruction** includes the assembly, maintenance, service, ownership, use or operation of owned aircraft not used in flight, but instead solely for maintenance or service as part of **Non-Flight Curriculum-Related Instruction**; however **Non-Flight Curriculum-Related Instruction** does not include:

- (i) the flying of any aircraft,
- (ii) the time commencing with the take-off run or landing run of any aircraft or
- (iii) the assembly, maintenance, service, ownership, use or operation of any aircraft actually used in flight.

**Occurrence** means:

- a. an accident during the **Policy Period** or the continuous, intermittent or repeated exposure to conditions that commence during the **Policy Period** that causes **Bodily Injury** or **Property Damage** neither expected nor intended by the **Insured**; or
- b. an event that first occurs during the **Policy Period** that causes **Personal Injury** or **Advertising Injury**.



## **scope of work**

July 2016 – June 2017

### **PHASE IV – FULL-SERVICE COMMUNITY SCHOOLS IN THE OAKLAND UNIFIED SCHOOL DISTRICT**

#### **Background**

At the request of district leaders in the Oakland Unified School District (OUSD), the John W. Gardner Center for Youth and Their Communities (Gardner Center) at Stanford University is conducting a three-year, multi-method study examining early outcomes and on-going implementation of OUSD's Full-Service Community Schools (FSCS) initiative. The present scope of work covers the twelve-month period between July 2016 and June 2017 (Phase IV). Our analysis during this phase of the project will be informed by lessons learned in Phase III where we studied the implementation of the full-service community schools model at a sample of schools to better understand the experiences and perspectives of multiple school and community stakeholders.

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*\*Key informant interviews and data request processes may shift the proposed timeline. Further, we note that deliverables and timeline may be altered with approval from OUSD based on the detailed plan developed with input from OUSD.*

**SAM Search Results**  
**List of records matching your search for :**

**Search Term : Leland\* Stanford\* Junior\* University\***  
**Record Status: Active**

<b>ENTITY</b>	LELAND STANFORD JUNIOR UNIVERSITY, THE	Status:Active
DUNS: 929824415	+4:	CAGE Code: 5SPH0 DoDAAC:
Expiration Date: Jul 19, 2017	Has Active Exclusion?: No	Delinquent Federal Debt?: No
Address: 2575 Sandhill Rd		
City: Menlo Park	State/Province: CALIFORNIA	
ZIP Code: 94025-7015	Country: UNITED STATES	

<b>ENTITY</b>	LELAND STANFORD JUNIOR UNIVERSITY, THE	Status:Active
DUNS: 830111068	+4:	CAGE Code: 1R1Y7 DoDAAC:
Expiration Date: Sep 15, 2017	Has Active Exclusion?: No	Delinquent Federal Debt?: No
Address: 459 LAGUNITA DR STE 7		
City: STANFORD	State/Province: CALIFORNIA	
ZIP Code: 94305-8214	Country: UNITED STATES	

<b>ENTITY</b>	LELAND STANFORD JUNIOR UNIVERSITY, THE	Status:Active
DUNS: 009214214	+4:	CAGE Code: 1KN27 DoDAAC:
Expiration Date: Apr 25, 2017	Has Active Exclusion?: No	Delinquent Federal Debt?: No
Address: 450 SERRA MALL		
City: STANFORD	State/Province: CALIFORNIA	
ZIP Code: 94305-2004	Country: UNITED STATES	



# PROFESSIONAL SERVICES CONTRACT ROUTING FORM 2016-2017

## 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 Talent 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) [Renee.McMearn@ousd.org](mailto:Renee.McMearn@ousd.org)

## Contractor Information

Contractor Name	Board of Trustees, Leland Stanford Junior Univ	Agency's Contact	Catherine Boxwell
OUSD Vendor ID #	I006294	Title	Senior Contract and Grant Officer
Street Address	3145 Porter Drive	City	Palo Alto
Telephone	(650) 725-6864	State	CA
		Zip	94304
		Email (required)	boxwell@stanford.edu
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	07/01/2016	Date work will end	06/30/2019	Other Expenses	
Pay Rate Per Hour (required)		Number of Hours (required)			

## Budget Information

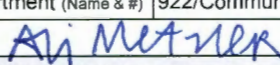
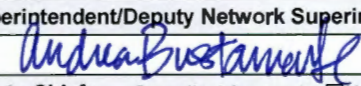
If you are planning to multi-fund a contract using LEP funds, please contact the State and Federal Office before completing requisition.

Resource #	Resource Name	Org Key	Object Code	Amount
5848	FSCS	9221528101	<b>5825</b>	\$ 25,000.00
9225	Kaiser Health&Well	9221211120	<b>5825</b>	\$ 75,000.00
			<b>5825</b>	
<b>Requisition No. (required)</b>		R0171838	<b>Total Contract Amount</b>	
			\$ 100,000.00	

## 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.	<b>Administrator / Manager</b> (Originator)		Name	Ali Metzler	Phone	(510) 879-2820
	Site/Department (Name & #)		922/Community Schools & Student Services Department		Fax	(510) 879-4605
	Signature				Date Approved	10/25/16
2.	<b>Resource Manager</b> , if using funds managed by: <input type="checkbox"/> State and Federal <input type="checkbox"/> Quality, Community, School Development <input checked="" type="checkbox"/> Community Schools & Student Services <input type="checkbox"/> Risk Mgmt					
	<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.	<b>Network Superintendent/Deputy Network Superintendent</b>					
	Signature				Date Approved	
	<b>Chiefs / Deputy Chiefs</b> Consultant Aggregate <input type="checkbox"/> Under <input type="checkbox"/> Over \$ _____					
4.	<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.	<b>Superintendent, Board of Education</b> Signature on the legal contract					
<b>Legal</b> Required if not using standard contract		Approved		Denied - Reason		Date
<b>Procurement</b>		Date Received		PO Number		