

Board Office Use: Legislative File Info.	
File ID Number:	16-2631
Introduction Date:	01/11/2017
Enactment Number:	
Enactment Date:	

# Memo

**To:** Board of Education

**From:** Antwan Wilson, Superintendent

**Board Meeting Date:** 01/11/2017

**Subject:** Professional Service Contract

**Contractor:** Alana Ross Events of Oakland, CA

**Services for:** 944-TALENT DIVISION

**Board Action Requested and Recommendation:** Ratification by the Board of Education of a Professional Services Contract between the District and Alana Ross Events, Oakland, CA, for the latter to provide: Phase 1: Awards Nominations. This will include the development and coordination of OUSD's nomination process for approximately nine award categories (e.g., Teacher of the Year (TOY,) Teaching Excellence, Excellence in Substitute Services, Classified School Employees of the Year (CSEY), Excellence in Educational Support, Educational Leadership, and Full Service Community School, and Superintendent's Special Recognition). Note that the nomination process for CSEY commences December, 2016, and TOY, early January, 2017, and therefore require an earlier start time than the other categories.

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

We need the services of an event planner to work closely with the Talent Division and the Event Steering Committee (ESC) to host "Honoring Our Own."

**Discussion:**  
(QUANTIFY what is being purchased.)

Phase 1: Awards Nominations. This will include the development and coordination of OUSD's nomination process for approximately nine award categories (e.g., Teacher of the Year (TOY,) Teaching Excellence, Excellence in Substitute Services, Classified School Employees of the Year (CSEY), Excellence in Educational Support, Educational Leadership, and Full Service Community School, and Superintendent's Special Recognition). Note that the nomination process for CSEY commences December, 2016, and TOY, early January, 2017, and therefore require an earlier start time than the other categories.

Phase 2: "Honoring Our Own" Event planning services for an Awards Ceremony which celebrates winners in these nine categories.

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**Fiscal Impact:** Funding Resource name(s) (detailed below) not to exceed \$20,000.00.

\$20,000.00

General Purpose-Unrestricted

**Attachments:** Professional Services Contract including Scope of Work



## CONTRACT JUSTIFICATION FORM

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

Legislative File ID No. 16-2631

Department: 944-TALENT DIVISION

Vendor Name: Alana Ross Events

Contract Term: Start Date: 10/31/2016 End Date: 05/31/2017

Annual Cost: \$ \$20,000.00

Approved by: TARA L GARD

Is Vendor a local Oakland business? Yes ☒ No ☐

### Why was this Vendor selected?

Worked with Vendor previously at OUSD

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

Was this contract competitively bid? Yes ☐ No ☒

If No, answer the following:

1) How did you determine the price is competitive?

Price compared with other vendors

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 \$87,800.00 (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 \$87,800.00 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

## PROFESSIONAL SERVICES CONTRACT 2016-2017

This Agreement is entered into between Alana Ross Events of Oakland, CA  
(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 10/31/2016, or the day immediately following approval by the Superintendent if the aggregate amount CONTRACTOR has contracted with the District is below \$87,800.00 in the current fiscal year; or, approval by the Board of Education if the total contract(s) exceed \$87,800.00, whichever is later. The work shall be completed no later than 05/31/2017.
- Compensation:** OUSD agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this Agreement. The compensation under this Contract shall not exceed Twenty Thousand Dollars and 00/100 Dollars (\$20,000.00) [per fiscal year], at an hourly billing rate not to exceed N/A 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 \$0.00.

### 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: MARY SCHNEIDERSite /Dept.: 944-TALENT DIVISIONAddress: 1000 Broadway Ste 295  
Oakland, CA 94607-4033Phone: (510) 879-0197Email: Maryjo.Schneider@ousd.org**CONTRACTOR:**Name: Alana RossTitle: OwnerAddress: 3871 Piedmont Ave  
Oakland, CA 94611Phone: 510-205-8319Email: alana.arcservices@mgci.com

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

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

9. **Insurance:**

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

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

Check one of the boxes below:

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

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

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

- iii. If CONTRACTOR is offering OUSD professional advice under this Contract, CONTRACTOR shall maintain Errors and Omissions insurance or Professional Liability insurance with coverage limits of One Million Dollars (\$1,000,000) per claim.

**OR**

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

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

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

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

13. **Drug-Free / Smoke Free Policy:** No drugs, alcohol, and/or smoking are allowed at any time in any buildings and/or grounds on OUSD property. No students, staff, visitors, CONTRACTORS, or subcontractors are to use controlled substances, alcohol or tobacco on these sites.
  14. **Indemnification:** CONTRACTOR agrees to hold harmless, indemnify, and defend OUSD and its officers, agents, and employees from any and all claims or losses accruing or resulting from injury, damage, or death of any person, firm, or corporation in connection with the performance of this Agreement. CONTRACTOR also agrees to hold harmless, indemnify, and defend OUSD and its elective board, officers, agents, and employees from any and all claims or losses incurred by any supplier, contractor, or subcontractor furnishing work, services, or materials to CONTRACTOR in connection with the performance of this Agreement. This provision survives termination of this Agreement.
  15. **Copyright/Trademark/Patent/Ownership:** CONTRACTOR understands and agrees that all matters produced under this Agreement shall become the property of OUSD and cannot be used without OUSD's express written permission. OUSD shall have all right, title and interest in said matters, including the right to secure and maintain the copyright, trademark, and/or patent of said matter in the name of OUSD. CONTRACTOR consents to use of CONTRACTOR's name in conjunction with the sale, use, performance and distribution of the matters, for any purpose and in any medium. These matters include, without limitation, drawings, plans, specifications, studies, reports, memoranda, computation sheets, the contents of computer diskettes, artwork, copy, posters, billboards, photographs, videotapes, audiotapes, systems designs, software, reports, diagrams, surveys, source codes or any other original works of authorship, or other documents prepared by CONTRACTOR or its Sub-CONTRACTORS in connection with the Services performed under this Agreement. All works shall be works for hire as defined under Title 17 of the United States Code, and all copyrights in those works are the property of OUSD.
  16. **Waiver:** No delay or omission by either party in exercising any right under this Agreement shall operate as a waiver of that or any other right or prevent a similar subsequent act from constituting a violation of the Agreement.
  17. **Termination:** OUSD may at any time terminate this Agreement upon 30 days prior written notice to CONTRACTOR. OUSD shall compensate CONTRACTOR for services satisfactorily provided through the date of termination. In addition, OUSD may terminate this Agreement for cause should CONTRACTOR fail to perform any part of this Agreement. In the event of termination for cause, OUSD may secure the required services from another contractor. If the cost to OUSD exceeds the cost of providing the services pursuant to this Agreement, CONTRACTOR shall pay the additional cost.
  18. **Conduct of CONTRACTOR:** By signing this Agreement, CONTRACTOR certifies compliance with the following requirements and will provide OUSD with evidence of staff qualifications, which include:
    1. **Tuberculosis Screening:** CONTRACTOR is required to screen employees who will be working at OUSD sites for more than six hours. CONTRACTOR affirms that each employee has current proof of negative TB testing on file and TB results are monitored.
    2. **Fingerprinting of Employees and Agents.** The fingerprinting and criminal background investigation requirements of Education Code section 45125.1 apply to CONTRACTOR's services under this Agreement and CONTRACTOR certifies its compliance with these provisions as follows: "CONTRACTOR certifies that CONTRACTOR has complied with the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 with respect to all CONTRACTOR's employees, subcontractors, agents, and subcontractors' employees or agents ("Employees") regardless of whether those Employees are paid or unpaid, concurrently employed by OUSD, or acting as independent contractors of CONTRACTOR, who may have contact with OUSD pupils in the course of providing services pursuant to the Agreement, and the California Department of Justice has determined that none of those Employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. Contractor further certifies that it has received and reviewed fingerprint results for each of its Employees and Contractor has requested and reviews subsequent arrest records for all Employees who may come into contract with OUSD pupils in providing services to the District under this Agreement.
- In the event that OUSD, in its sole discretion, at any time during the term of this contract, desires the removal of any CONTRACTOR related persons, employee, representative or agent from an OUSD school site and, or property, CONTRACTOR shall immediately, upon receiving notice from OUSD of such desire, cause the removal of such person or persons.
19. **No Rights in Third Parties:** This Agreement does not create any rights in, or inure to the benefit of, any third party except as expressly provided herein.
  20. **OUSD's Evaluation of CONTRACTOR and CONTRACTOR's Employees and/or Subcontractors.** OUSD may evaluate CONTRACTOR's work in any way that OUSD is entitled to do so pursuant to applicable law. The OUSD's evaluation may include, without limitation:
    1. Requesting that OUSD employee(s) evaluate the CONTRACTOR and the CONTRACTOR's employees and subcontractors and each of their performance.
    2. Announced and unannounced observance of CONTRACTOR, CONTRACTOR's employee(s), and/or subcontractor(s).
  21. **Limitation of OUSD Liability:** Other than as provided in this Agreement, OUSD's financial obligations under this Agreement shall be limited to the payment of the compensation provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event, shall OUSD be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of, or in connection with, this Agreement for the services performed in connection with this Agreement.
  22. **Confidentiality:** CONTRACTOR and all CONTRACTOR's agents, personnel, employee(s), and/or subcontractor(s) shall maintain the confidentiality of all information received in the course of performing the Services. CONTRACTOR understands that student records are confidential and agrees to comply with all state and federal laws concerning the maintenance and disclosure of student records. This requirement to maintain confidentiality shall extend beyond the termination of this Agreement. Contractors will be permitted

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

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

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

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

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

## OAKLAND UNIFIED SCHOOL DISTRICT



☐ President, Board of Education

☒ Superintendent or Designee

\_\_\_\_\_  
Secretary, Board of Education

## CONTRACTOR

Alana Ross

\_\_\_\_\_  
Contractor Signature

Alana Ross, Owner

\_\_\_\_\_  
Print Name, Title

Form approved by OUSD General Counsel for 2015-16 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.

See Attached Scope of Work

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

Honoring Our Own event planning and support for the nomination process for the nomination process for this year's awards.

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 type="checkbox"/> Develop social, emotional and physical health | <input 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 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(s):

- ☐ **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.

Scope of Work  
*Employee Recognition Awards Program – November 29, 2016*  
Talent Division- Oakland Unified School District

**INTRODUCTION**

The Alana Ross Group is pleased to present the following **Scope of Services** to assist OUSD's Talent Division with its Employee Recognition Awards Program. For 2017, the program will be implemented in two phases. Thus, the proposed tasks reflect this division and are, therefore, described and priced separately.

Phase 1: Awards Nominations. This will include the development and coordination of OUSD's nomination process for approximately nine award categories (e.g., Teacher of the Year (TOY,) Teaching Excellence, Excellence in Substitute Services, Classified School Employees of the Year (CSEY), Excellence in Educational Support, Educational Leadership, and Full Service Community School, and Superintendent's Special Recognition). Note that the nomination process for CSEY commences December 2016 and TOY, early January, 2017 and therefore require an earlier start time than the other categories.

Phase 2: "Honoring Our Own" Event. This involves event planning services for an Awards Ceremony which celebrates winners in these nine categories. At this time, OUSD officials have not confirmed if the Gala will be held and if the format will remain unchanged. If OUSD decides to move forward with the same or comparable event as "Honoring Our Own," we have delineated those tasks as well to ensure its success.

We appreciate the opportunity to offer this **Scope of Work** for the Employee Recognition Awards Program and look forward to working with the OUSD team to facilitate this effort.

**SCOPE OF WORK**

The following **Scope of Work** describes how the event planner will carry out this effort. The work will comprise two phases: Awards Nomination Process and planning and coordination of the Honoring Our Own Ceremony (or comparable event). We have divided the project tasks into these key phases. A number of tasks will be undertaken simultaneously to commence activities as quickly as possible.

Scope of Work  
*Employee Recognition Awards Program – November 29, 2016*  
Talent Division- Oakland Unified School District

**PHASE 1. Awards Nomination Process**

**1.0 Start-Up Administrative Tasks**

1.1 Meet with PM to review tasks such as roles and responsibilities; confirm scope of services with re: to Phase 1; and establish project parameters

1.2 Develop **Work Plan and Timeline**, using the format created by OUSD

**2.0 Awards Nomination Process**

2.1 Hold strategic meetings to establish process for implementing 2017 nomination activities and ensuring it stays on track; devise calendar; make appropriate adjustments where deemed necessary

2.2 Survey nomination processes of other educational institutions for ideas to maximize efficiency of OUSD's process; review findings with PM, and incorporate recommendations into 2017 nomination forms

2.3 Collect necessary informational materials (e.g., nomination criteria for various categories) to facilitate revision of 2017 nomination forms that will be used for designated categories

2.4 Produce draft "prototype" nomination form; based on input from OUSD, revise and finalize for "official" use by the District; and serve as central resource on form content updates or production issues

2.5 Assist staff with distribution, outreach, and follow-up to maximize participation, facilitate completion of forms to widen the pool of potential nominees

2.6 Assist PM with administrative tasks related to various tasks, e.g.:

- a. Staff designated group that will review nomination(s)
- b. Before forms are submitted to committee(s), review them for completeness, legibility; do follow-up if necessary
- c. Organize summaries of nominees to facilitate review by the committee(s)

Scope of Work  
*Employee Recognition Awards Program – November 29, 2016*  
Talent Division- Oakland Unified School District

**Phase 1. Awards Nomination Process**

- d. Prepare necessary packets, spreadsheets, records to keep track decisions of the committee(s)
- 2.7 Maintain summaries for use to prepare program materials if the Employee Awards event is held
- 2.8 Oversee production of award plaques, which includes serving as liaison between OUSD and Company that produces them

**PHASE 2. Employee Awards Event**

**1.0 Start-Up Administrative Tasks**

- 1.1 Meet with PM to review tasks such as roles and responsibilities; obtain updates on budget development, project timeline, monitoring, proposed program format, and site logistics
- 1.2 Develop **Work Plan and Timeline**, using the format created by OUSD
- 1.3 Identify areas where donations might be obtained to reduce costs, establish donation strategy, and coordinate outreach to meet goals

**2.0 Event Steering Committee (ESC)**

- 2.1 Collaborate with ESC on program strategies and implementation
- 2.2 Assist with the scheduling, development of agendas, and organizing working documents; ensure action items are completed
- 2.3 Report regularly to PM on project's progress and needs
- 2.4 Serve as overall project lead and liaison

**3.0 Administration – Finance**

- 3.1 Monitor expenditures to ensure they are within budget parameters established by PM
- 3.2 Review invoices for accuracy prior to submitting them to PM for processing

Scope of Work  
*Employee Recognition Awards Program – November 29, 2016*  
Talent Division- Oakland Unified School District

**Phase 2. Employee Awards Event**

**4.0 Program: General**

- 4.1 Working in collaboration with the ESC, help identify the key components of the program, building it around the goals, theme, and messages of event
- 4.2 Assist with identifying potential program participants beyond awardees, e.g., presenters, entertainment and special guests, etc.; prepare correspondences; and do follow-up to confirm attendance
- 4.3 Serve as central resource and liaison for program participants prior to and on the event day; provide them with key information, schedules, and logistical information for briefing purposes
- 4.4 Assist with the development of a program timeline, oversee updates; distribute to recipients prior to and on event day
- 4.5 Identify opportunities to incorporate messaging in guest experience, event décor, etc.

**Program: Production Elements**

- 4.6 Determine needs for technical and support services (e.g., A-V, sound, and lighting) and secure venue personnel or high-quality vendors to supply these services
- 4.7 Review contracts/specifications to ensure they meet service and budget parameters; provide appropriate checklists, and monitor performance
- 4.8 Serve as resource to script writing team and ensure that production elements support program flow, speaker requirements, and script content
- 4.9 Coordinate arrival times of technical crew, others involved in the program or production for run-through (using the script or program timeline as a reference); devise system to facilitate communication during program
- 4.10 Develop timelines for catering staff to follow to ensure service does not interfere during program portion of event

Scope of Work  
*Employee Recognition Awards Program – November 29, 2016*  
Talent Division- Oakland Unified School District

**Phase 2. Employee Awards Event**

**Program: Booklet Production**

- 4.11 Coordinate production of printed program from initial design to delivery at site
- 4.12 Assist with collecting of information
- 4.13 Serve as liaison between design team and printer

**Program: Awards**

- 4.14 Collaborate with PM, ESC on type of awards to select for awardees; coordinate production, ordering, and delivery of them to venue
- 4.15 Oversee placement of awards at event to facilitate distribution during program

**Program: Other**

- 4.16 Confer with ESC on what types of pictures they will want to capture during the evening
- 4.17 Based on their input, prepare written instructions to photographer and videographer and give to them to direct their coverage during event
- 4.18 Arrange for provision of services for individuals with special needs (if deemed necessary)

**5.0 Site Coordination and Logistics**

- 5.1 Based on **Work Plan**, do checklist of needs, activities which will occur at site, and tentative timeline related to set-up in preparation for initial meeting with venue
- 5.2 Arrange for site visit
- 5.3 Develop a comprehensive site plan covering such aspects flow of guests, location of registration and reception areas; placement of directional signage, entertainment and banquet seating; staging; and space availability (for storage or Green Room)

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- 5.4 Address security, parking, ADA accommodations, insurance (or permits), any technical limitations that require outside vendor augmentation, set-up schedule, staff ratios to deliver optimum service/set-up, or any risk management issues (e.g., protest)
- 5.5 Review site contract prior to submission to PM for final sign-off
- 5.6 Prepare an **Operational Plan** and **Equipment and Supplies Inventory** to review at a pre-event meeting (**See also Task 11.0**)
- 5.7 Serve as liaison between venue and OUSD; monitor performance to ensure the highest quality of service is delivered in keeping with event goals
- 5.8 Identify signage needs and confer with PM, coordinate their production, if approved

**6.0 Food and Beverage Service**

- 6.1 Consult with caterer on scope of services (provision of linens or tables chairs; option to use outside source for specialty linens, tables, chairs and table tent holders); capability of fulfilling special dietary requests and system to identify those special requests; creating a quality and beautifully-presented meal; covering beverage (possibly wine) service; and requirements for giving meal guarantees
- 6.2 Schedule a meal-tasting (non-vegetarian and vegetarian) to ensure that the quality and presentation of the menu meets OUSD standards
- 6.3 Provide updates to the caterer on food guarantees
- 6.4 Review catering contract before it is submitted to PM for final sign-off

**7.0 Service/Vendors Coordination**

- 7.1 Based on budget, identify needed services (e.g., printer, signage, décor, photographer, and videographer), review scope of work of vendors, and ensure their costs are within budget parameters
- 7.2 Monitor performance for compliance with contract terms
- 7.3 Arrange for timely delivery or set-up of goods or services



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7.4 Maintain on-going communication with vendors

7.5 Serve as liaison between vendors and OUSD

**8.0 Event Design/Décor**

8.1 Establish unifying elements for venue décor and event ambiance, such as specialty linens, table centerpieces, table signage, plants and floral arrangements, potential art work from students, theme-related backdrops (e.g., step-and-repeat, red carpet), stage decorations, and gift bags for guests

8.2 Select and coordinate resources to execute event design

8.3 Monitor, coordinate, and conduct follow-up with providers to ensure smooth and consistent communications, timely delivery of products or services, and conformance to budgetary allowances for non-donated items

**9.0 RSVPs: General**

9.1 Devise an efficient and organized system for awardees, other attendees to receive and respond to information about event registration (including confirming participation, deadlines, dietary restrictions, guest names, check-in instructions, and other messages)

9.2 Do follow-up where necessary

**Registration**

9.3 Maintain **Master Registration List**; provide updates and customized reports upon request

**Seating**

9.4 From site plan, use CAD program to do layout of event space for registration and ballroom

9.5 Using master registration list, assign seating; review proposed plan with PM

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- 9.6 Create appropriate charts to depict layout, produce list of attendees in alpha order by table assignment; consider producing a master layout of ballroom on 24 x 36 foam core board
- 9.7 Provide copies of seating for on-site registration team (**See also Task 13.0**)
- 9.8 Explore ways to reduce long registration lines (e.g., pre-event seating notice)

**10.0 Volunteers**

- 10.1 Manage volunteer services and activities
- 10.2 Plan for staffing needs for the event, beyond those covered by catering and the venue, e.g., volunteers to handle registration, hospitality, and guest services; establish quantity, in what roles, and at what times for tasks prior to event and on day of; solicit input from PM for potential sources; and prepare written information on tasks and timeframe for coverage
- 10.3 Coordinate a pre-event meeting if feasible to do orientation
- 10.4 Supervise volunteers on-site

**11.0 Pre-Event Site Check and Set-Up**

- 11.1 Create an **Operation Plan** and **Equipment and Supplies Inventory** to ensure venue staff, caterer, and set-up conform to established standards of service. Unlike the **Work Plan**, this document would be drafted to address logistics only for the Awards Gala.
- 11.2 Coordinate meeting between venue and PM
- 11.3 Review schedules, arrangements, and specifications for deliverables with vendors, service providers, entertainment, photographer, and videographer 2-3 days prior to event
- 11.4 Arrange with venue to designate an area to stuff and store gift bags 1-2 days prior to event

**12.0 Guest Experience**

- 12.1 Based on event goals, ensure that the key elements for creating a memorable guest experience have been integrated in event logistics from point of arrival to end of event.

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- 12.2 Devise plan to welcome and register awardees and their guests
- 12.3 Send notices to awardees outlining evening's program, check-in location, and other logistical details
- 12.4 Determine level of volunteer to host awardees (District-level representative or a student host) **(See also Task 10.0)**

**13.0 On-Site Coverage: General**

- 13.1 Oversee and monitor set-up of all venue spaces based on specifications
- 13.2 Coordinate technical set-up for program, arrange for sound/lighting checks
- 13.3 Arrange for program participants (e.g., MC, speakers) to test sound
- 13.4 Serve as central resource to MC, speakers, program participants, volunteers, and service providers on logistics, and special request matters
- 13.5 Troubleshoot logistical problems
- 13.6 Deploy volunteers
- 13.7 Oversee breakdown and closeout after event concludes

**14.0 Stage Management**

- 14.1 Provide back-up support to stage manager
- 14.2 Coordinate logistics of briefing meeting with program participants an hour before event to review script, timeline, and other arrangements

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**15.0 Guest Services/Hospitality**

15.1 Coordinate host assignments to awardees

**16.0 Project Close-Out**

16.1 Collect outstanding invoices and review them before forwarding to PM for processing

16.2 Organize any outstanding paperwork or records that need to be returned to OUSD

16.3 Attend debriefing meeting

**BUDGET AND FEES**

Work Products	Amount	Due
Phase 1. Awards Nomination Process	\$ 5,000	TBD
Phase 2: Employee Awards Event	\$15,000	TBD
Total	\$ 20,000.	

The Planner will be responsible for payment of staff support to assist with administrative aspects of this project (including back-up coverage on the day of the awards gala). Additionally, our expenses incurred by the project, such as, but not limited to – office supplies, telephone calls, faxing, and mileage – will also be included in the fees quoted above. However, the PM will pay such direct expenses related to mass mailings, production, subcontractors, and vendors hired solely for the awards gala; or specialty services for technical support (e.g., web or social media), and program copy or script writing.

Respectfully submitted,

Alana Ross Group