



# Oakland Unified School District

Board of Education  
1011 Union Street, #940  
Oakland, CA 94607  
(510) 879-1944  
boe@ousd.org E-Mail  
http://www.ousd.org

## Legislation Details (With Text)

|                        |                       |                      |                         |              |                                                                                        |
|------------------------|-----------------------|----------------------|-------------------------|--------------|----------------------------------------------------------------------------------------|
| <b>File #:</b>         | 16-1182               | <b>Version:</b>      | 1                       | <b>Name:</b> | Professional Services Contract - Capitol Advisors Group, LLC - Chief Financial Officer |
| <b>Type:</b>           | Agreement or Contract | <b>Status:</b>       | Passed                  |              |                                                                                        |
| <b>File created:</b>   | 5/19/2016             | <b>In control:</b>   | Senior Business Officer |              |                                                                                        |
| <b>On agenda:</b>      | 6/22/2016             | <b>Final action:</b> | 6/22/2016               |              |                                                                                        |
| <b>Enactment date:</b> | 6/22/2016             | <b>Enactment #:</b>  | 16-0938                 |              |                                                                                        |

**Title:** Ratification by the Board of Education of a Professional Services Contract between the District and Capitol Advisors Group, LLC, Sacramento, CA, for the latter to review Client application of California Education Code and regulations for all programs identified by the California Department of Education (CDE) as being included in the 2015/16 Mandate Block Grant; advise and assist Client in the preparation and filing of annual claims on programs outside the Mandate Block Grant for which the filing deadline falls within the Agreement period; advise and assist Client in the preparation and filing of initial (test) claims on programs outside the Mandate Block Grant for which the filing deadline falls within the Agreement period; advise and assist Client in establishing cost-tracking methodologies for initial (test) claims on programs outside the Mandate Block Grant, which were introduced within the agreement period but for which a filing deadline has not been established; conduct Client interviews, in District and remotely (phone/internet), for purposes of documenting and understanding client application of codes and regulations contained in the Mandate Block Grant; conduct Client interviews, in District and remotely (phone/internet), for purposes of identifying and gathering documentation to support client application of codes and regulations contained in the Mandate Block Grant; conduct Client visit(s) in order to obtain documentation used in supporting client application of codes and regulations contained in the Mandate Block Grant; provide Client with comprehensive Report regarding client's application of code and regulations for all programs contained in the Mandate Block Grant; provide in Report summaries of relevant client narratives and supporting documentation for each program; provide Report in both hard copy and electronic form; advise and assist District in the event of a California state agency inquiry and/or audit of any program contained within the Mandate Block Grant for the applicable Fiscal Year; advise and assist District in the event of State Controller's Office inquiry and/or audit of any mandated cost claim(s) filed outside the Mandate Block Grant without respect to whether the claim(s) were filed with Contractor assistance or not; advise and assist District in the amendment of any claim(s) filed with the State Controller's Office, for which the period to amend the claim remains open; and provide Client updates on relevant legislative issues and proposals related to the Mandate Block Grant Program and the Mandated Cost Claim filing program, via the Office of the Senior Business Officer, for the term July 1, 2015 through June 30, 2016, in an amount not to exceed \$35,000.00.

### Sponsors:

### Indexes:

### Code sections:

**Attachments:** 1. 16-1182 Professional Services Contract - Capitol Advisors Group, LLC - Chief Financial Officer

**Contact:** Ruth.Alahydoian@ousd.org

| Date      | Ver. | Action By          | Action                                | Result |
|-----------|------|--------------------|---------------------------------------|--------|
| 6/22/2016 | 1    | Board of Education | Adopted on the General Consent Report | Pass   |

Ratification by the Board of Education of a Professional Services Contract between the District and Capitol Advisors Group, LLC, Sacramento, CA, for the latter to review Client application of California Education Code and regulations for all programs identified by the California Department of Education (CDE) as being included in the 2015/16 Mandate Block Grant; advise and assist Client in the preparation and filing of annual claims on programs outside the Mandate

Block Grant for which the filing deadline falls within the Agreement period; advise and assist Client in the preparation and filing of initial (test) claims on programs outside the Mandate Block Grant for which the filing deadline falls within the Agreement period; advise and assist Client in establishing cost-tracking methodologies for initial (test) claims on programs outside the Mandate Block Grant, which were introduced within the agreement period but for which a filing deadline has not been established; conduct Client interviews, in District and remotely (phone/internet), for purposes of documenting and understanding client application of codes and regulations contained in the Mandate Block Grant; conduct Client interviews, in District and remotely (phone/internet), for purposes of identifying and gathering documentation to support client application of codes and regulations contained in the Mandate Block Grant; conduct Client visit(s) in order to obtain documentation used in supporting client application of codes and regulations contained in the Mandate Block Grant; provide Client with comprehensive Report regarding client's application of code and regulations for all programs contained in the Mandate Block Grant; provide in Report summaries of relevant client narratives and supporting documentation for each program; provide Report in both hard copy and electronic form; advise and assist District in the event of a California state agency inquiry and/or audit of any program contained within the Mandate Block Grant for the applicable Fiscal Year; advise and assist District in the event of State Controller's Office inquiry and/or audit of any mandated cost claim(s) filed outside the Mandate Block Grant without respect to whether the claim(s) were filed with Contractor assistance or not; advise and assist District in the amendment of any claim(s) filed with the State Controller's Office, for which the period to amend the claim remains open; and provide Client updates on relevant legislative issues and proposals related to the Mandate Block Grant Program and the Mandated Cost Claim filing program, via the Office of the Senior Business Officer, for the term July 1, 2015 through June 30, 2016, in an amount not to exceed \$35,000.00.