

INDEPENDENT CONTRACTOR AGREEMENT FOR FACILITY MASTER PLANNING SERVICES

This agreement (“Agreement”) is by and between the Latrobe School District (“District”) and King Consulting, Inc. (“Contractor”) (together, they are referred to as “Parties,” and individually, as a “Party”).

AGREEMENT

1. EXHIBITS

This Agreement has multiple Exhibits. Any Exhibit that is specified in this Agreement is by this reference made a part of it.

Exhibits include:

- Exhibit A: Scope of Services
- Exhibit B: Compensation
- Exhibit C: General Terms and Conditions
- Exhibit D: Insurance

2. EFFECTIVE DATE AND TERM

- a. This Agreement is effective on July 21, 2021 (“Effective Date”).
- b. Unless terminated or otherwise cancelled in accordance with a provision of this Agreement, the term of this Agreement shall be: (i) from the Effective Date to (ii) September 15, 2021.

3. INDEPENDENT CONTRACTOR

Contractor, in the performance of this Agreement, is and shall act as an independent contractor. Contractor understands and agrees that Contractor and all of Contractor’s employees shall not be considered officers, employees, agents, partner, or joint venture of District, and are not entitled to benefits of any kind or nature normally provided employees of District and/or to which District’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.

4. SCOPE OF SERVICES

Contractor shall furnish to District the services described in Exhibit A (“Services”).

5. COMPENSATION

Contractor shall receive payment, for Services satisfactorily rendered pursuant to this Agreement, as specified in Exhibit B (“Compensation”).

6. GENERAL TERMS AND CONDITIONS

The General Terms and Conditions are set forth in Exhibit C.

7. INSURANCE

Exhibit D, entitled Insurance, is attached and incorporated by reference.

8. NOTICE

Any notice required by this Agreement may be given either by personal service or by deposit (postage prepaid) in the U.S. mail addressed as follows:

To District:
Latrobe School District
7900 S. Shingle Road
Shingle Springs, CA 95682
Attn: Dave Scroggins, Superintendent

To Contractor:
King Consulting, Inc.
2901 35th Street
Sacramento, CA
Attn: Jamie King-Iseman, President

9. LIMITATION OF LIABILITY

Other than as provided in this Agreement, District'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 District 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.

The Parties have executed this Agreement on the dates indicated below.

Latrobe School District

Date: July 22, 2021


By: _____

Print Name: Dave Scroggins

Its: Superintendent

King Consulting, Inc.

Date: July 22, 2021

By:  _____

Print Name: Jamie King-Iseman

Its: President

**EXHIBIT A
to AGREEMENT FOR SERVICES**

SCOPE OF SERVICES

Facility Master Planning Services consisting of the following:

- A. Develop a Long Range Deferred Maintenance Plan, Educational Plan and Facility Assessment to include:
 - 1. Campus Facility Assessment: Our team of Architects and Engineers will walk all-campuses in the District and perform a room by room condition assessment of all District facilities and building systems (mechanical, electrical, plumbing, etc.).
 - 2. Facility Assessment Report: Our team will develop a Major Deferred Maintenance report that outlines each room building system including each element's estimated date of construction, remaining useful life, and projected replacement cost and year.
 - 3. Identification of Upcoming Deferred Maintenance Project: Utilizing the facility assessment our team will identify deferred maintenance needs and project replacement dates for all building systems (based on each elements expected useful life). We will then couple this information with known maintenance needs.
 - 4. Create a Facility Database: The information gathered during the facility assessment will then Be used to develop a facility database for Latrobe Elementary School District. This database will allow the District to proactively move forward in addressing upcoming deferred maintenance needs.
 - 5. Calculation of the district's pupil capacity, including a comparison of capacity values utilizing various assumptions on classroom loading and room uses.
 - 6. Review and align educational specifications update and/or establish to reflect District's facilities standards and educational goals.

- B. Financial Analysis: Research and analyze all potential local, State, and Federal funding sources to support the implementation of the Facility Master Plan to include:
 - 1. Review, prepare and submit documentation required to maximize the District's New Construction and Modernization eligibility under the State School Facility Program.
 - 2. Obtain from the District facilities and enrollment information required to determine the amount of state modernization and new construction grant funding eligibility under the State School Facility Program.
 - 3. Review site diagrams for square footage, classroom counts, age of facilities. Prepare and update facility capacity database annually to include any new additional facilities.

4. Prepare required enrollment and facilities reports for District review and approval to file with the Office of Public School Construction to seek approval of Modernization and New Construction eligibility. Prepare annual updated enrollment and facility reports as needed or required.
 5. Secure State Allocation Board approval of District's eligibility.
 6. Research all available additional local and Federal sources of funding including but not limited to local Developer Fees, FEMA, PG&E On-Bill Financing, State Water Resource Control Board, EPA and others.
- C. Preparation of Study Document: Preparation of a District-wide Facility Master Plan that includes a prioritized list of known maintenance needs as well as their estimated construction costs, possible funding sources, and proposed year of completion. Provide draft plan for review by District staff and the governing Board of Trustees.
- D. Finalized Plan and School Board Presentation to include:
1. Incorporate any draft revisions into a final District-wide Facility Master Plan.
 2. Present final document to governing Board of Trustees for approval and adoption at a regularly scheduled Board Meeting.

EXHIBIT B
to AGREEMENT FOR SERVICES

COMPENSATION

A. Compensation

Not to exceed the sum of Twenty-Five Thousand Nine Hundred Seventy-Five and 00/100 Dollars (\$25,975.00) to be computed pursuant to the following hourly rate schedule and includes any pre-approved costs by District:

Title	Rate
Jamie King-Iseman, President	\$185.00 per Hour
Jennifer Gibb, Director of Finance & Business Development	\$185.00 per Hour
Evelyn Shafer, Director of State Funding	\$185.00 per Hour

B. Payment

- a. Schedule – July 22, 2021 - September 15, 2021
- b. Process

Payment shall be made (for all undisputed amounts) within thirty (30) calendar days after Contractor submits an invoice to District for Services actually completed.

- c. Contractor will not charge District for travel time.

EXHIBIT C
to AGREEMENT FOR SERVICES

GENERAL TERMS AND CONDITIONS

1. **STANDARD OF CARE.** Contractor's Services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of his/her profession for services to California school districts.
2. **ORIGINALITY OF SERVICES.** Contractor agrees that all technologies, formulae, procedures, processes, methods, writings, ideas, dialogue, compositions, recordings, teleplays and video productions prepared for, written for, or submitted to District and/or used in connection with this Agreement, shall be wholly original to Contractor and shall not be copied in whole or in part from any other source, except those submitted to Contractor by District as a basis for such services.
3. **PRODUCT.** Contractor understands and agrees that all matters produced under this Agreement shall become the property of District and cannot be used without District's express written permission. District 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 District. 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.
4. **TERMINATION.**
 - a. **Without Cause by District.** District may, at any time, with or without reason, terminate this Agreement and compensate Contractor only for services satisfactorily rendered to the date of termination. Written notice by District shall be sufficient to stop further performance of services by Contractor. Notice shall be deemed given when received by Contractor or no later than three (3) days after the day of mailing, whichever is sooner.
 - b. **Without Cause by Contractor.** Contractor may not terminate this Agreement without cause.
 - c. **With Cause by District.** District may terminate this Agreement upon giving written notice of intent to terminate for cause. Cause shall include:
 - (1) material violation of this Agreement by Contractor; or
 - (2) any act by Contractor exposing District to liability to others for personal injury or property damage; or
 - (3) Contractor is adjudged bankrupt, Contractor makes a general assignment for the benefit of creditors, or a receiver is appointed on account of Contractor's insolvency.
 - d. **With Cause by Contractor.** Contractor may terminate this Agreement upon giving of written notice of intention to terminate for cause. Cause shall include:
 - (1) material violation of this Agreement by District; or
 - (2) any act by District exposing Contractor to liability to others for personal injury or property damage; or
 - (3) District is adjudged bankrupt, District makes a general assignment for the benefit of creditors or a receiver is appointed on account of Contractor's insolvency.
 - e. Upon termination, Contractor shall provide District with all documents produced maintained or collected by Contractor pursuant to this Agreement, whether or not such documents are final or draft documents.

5. INDEMNIFICATION / DEFENSE / HOLD HARMLESS.

a. **Generally.** To the furthest extent permitted by California law, Contractor shall indemnify, defend, and hold free and harmless the Indemnified Parties from any Claim that directly or indirectly, in whole or in part, arises out of, pertains to, or relates to:

- (1) the negligent errors or omissions (active or passive, ordinary or gross), recklessness (ordinary or gross), or willful misconduct of Contractor, its directors, officials, officers, employees, contractors, subcontractors, consultants, or subconsultants; *or*
- (2) the performance of this Agreement

b. **Indemnified Parties, Defined.** The "Indemnified Parties" are District, its officers, consultants, employees, and trustees.

c. **Claim, Defined.** A "Claim" consists of actions, assessments, counts, citations, claims, costs, damages, demands, judgments, liabilities (legal, administrative or otherwise), losses, notices, expenses, fines, penalties, proceedings, responsibilities, violations, reasonable attorney's and consultants' fees and causes of action to property or persons, including personal injury and/or death, except that:

- (1) If the Contract is a contract for design professional services under Civ. Code, § 2782.8, a "Claim" shall be limited to those that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of Contractor; and
- (2) If the Contract is a construction contract with a public agency under Civ. Code, § 2782, a "Claim" shall exclude any loss to the extent that such loss arises from the active negligence, sole negligence, or willful misconduct of the Indemnified Parties or defects in design furnished by those persons.

d. District may accept or reject legal counsel Contractor proposes to defend District with, in its sole and absolute discretion, and may thereafter appoint, legal counsel to defend District at Contractor's expense against a Claim set forth in Section 5.a, supra, of this Exhibit C.

6. **INSURANCE.** Contractor shall procure and maintain at all times it performs any portion of the Services the insurances specified in Exhibit D to the Agreement.

7. **CONFIDENTIALITY.** Contractor and 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 ("Confidential Information"), and shall not disclose Confidential Information, including information derived from Confidential Information, to any person not a party to this Agreement without the express prior written consent of District, except as required by law or as necessary for Contractor's agents, personnel, employee(s), and/or subcontractor(s) to perform the Services. If Contractor or any of Contractor's agents, personnel, employee(s), and/or subcontractor(s) is served with any subpoena, court order, or other legal process seeking disclosure of any Confidential Information, both Contractor and the person served shall each promptly send to District notice(s) of the legal process," but in no event shall do so any later than forty-eight (48) hours or such shorter time frame as necessary so that District may exercise any applicable legal rights and remedies. Contractor shall require its agents, personnel, employee(s), and/or subcontractor(s), as a condition of their retention, appointment, employment, or contract, to agree to comply with the provisions of this Section, and shall not permit its agents, personnel, employee(s), and/or subcontractor(s) access to Confidential Information in the absence of such agreement being effective. The obligations imposed in this Section shall survive the termination of this Agreement.

8. **CONFLICT OF INTEREST.** Through its execution of this Agreement, Contractor acknowledges that it is familiar with the provisions of Gov. Code, § 1090 et seq. and Chapter 7 of the Political Reform Act of 1974 (Gov. Code, § 87100 et seq.), and certifies that it does not know of any facts that constitute a violation of those provisions. In the event Contractor receives any information subsequent to execution of this Agreement that might constitute a violation of these provisions, Contractor agrees it shall immediately notify District of this information.

9. **APPROVAL OF LEGISLATIVE BODY.** This Agreement shall not be binding upon District until District's Governing Board has approved all the terms and conditions contained herein.

10. **DISPUTES.** In the event of a dispute between the parties as to performance of Services, Agreement interpretation, or payment, the Parties shall attempt to resolve the dispute by negotiation and/or mediation, if agreed to by the Parties. Pending resolution of the dispute, Contractor shall neither rescind the Agreement nor stop performing the Services.

11. **COMPLIANCE WITH LAWS.** Contractor shall observe and comply with all rules and regulations of the governing board of District and all federal,

state, and local laws, ordinances and regulations. Contractor shall give all notices required by any law, ordinance, rule and regulation bearing on conduct of the Services as indicated or specified. If Contractor observes that any of the Services required by this Agreement is at variance with any such laws, ordinance, rules or regulations, Contractor shall notify District, in writing, and, at the sole option of District, any necessary changes to the scope of the Services shall be made and this Agreement shall be appropriately amended in writing, or this Agreement shall be terminated effective upon Contractor's receipt of a written termination notice from District. If Contractor performs any work that is in violation of any laws, ordinances, rules or regulations, without first notifying District of the violation, Contractor shall bear all costs arising therefrom.

12. **PERMITS / LICENSES.** Contractor and all Contractor's employees or agents shall secure and maintain in force all permits and licenses that are required by law in connection with the furnishing of Services pursuant to this Agreement.
13. **SAFETY AND SECURITY.** Contractor is responsible for maintaining safety in the performance of this Agreement. Contractor shall be responsible to ascertain from District the rules and regulations pertaining to safety, security, and driving on school grounds, particularly when children are present.
14. **ANTI-DISCRIMINATION.** It is the policy of District that in connection with all work performed under contracts there be no discrimination against any employee engaged in the work because of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status, or any other class or status protected by applicable law, and 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. In addition, Contractor agrees to require like compliance by all its subcontractor(s).
15. **FINGERPRINTING OF EMPLOYEES.** Contractor shall comply with the provisions of Education Code section 45125.1 regarding the submission of employee fingerprints to the California Department of Justice and the completion of criminal background investigations of its employees if required by law to do so. Contractor shall not permit any employee to have any contact with District pupils until such time as Contractor has verified in writing to the governing

board of District that the employee has not been convicted of a felony, as defined in Education Code section 45122.1. Contractor's responsibility shall extend to all employees, subcontractors, agents, and employees or agents of subcontractors regardless of whether those individuals are paid or unpaid, concurrently employed by District, or acting as independent contractors of Contractor. Verification of compliance with this Section shall be provided in writing to District prior to each individual's contact with any student.

16. **AUDIT.** Contractor shall establish and maintain books, records, and systems of account, in accordance with generally accepted accounting principles, reflecting all business operations of Contractor transacted under this Agreement. Contractor shall retain these books, records, and systems of account during the Term of this Agreement and for three (3) years thereafter. Contractor shall permit District, its agent, other representatives, or an independent auditor to audit, examine, and make excerpts, copies, and transcripts from all books and records, and to make audit(s) of all billing statements, invoices, records, and other data related to the Services covered by this Agreement. Audit(s) may be performed at any time, provided that District shall give reasonable prior notice to Contractor and shall conduct audit(s) during Contractor's normal business hours, unless Contractor otherwise consents.
17. **EVALUATION OF CONTRACTOR AND SUBORDINATES.** District may evaluate Contractor in any manner which is permissible under the law. District's evaluation may include, without limitation:
 - a. Requesting that District employee(s) evaluate Contractor and Contractor's employees and subcontractors and each of their performance.
 - b. Announced and unannounced observance of Contractor, Contractor's employee(s), and/or subcontractor(s)
18. **TIME IS OF THE ESSENCE.** Time is of the essence in the performance of Services and the timing requirements agreed upon by the Parties, if any, shall be strictly adhered to unless otherwise modified in writing in accordance with Section 28 of this Agreement. Contractor shall commence performance and shall complete all required Services no later than the dates agreed upon by the Parties. Any Services for which times for performance are not specified shall be commenced and completed by Contractor in a reasonably prompt and timely manner based upon the circumstances and direction communicated to Contractor by District.
19. **PROVISIONS REQUIRED BY LAW DEEMED INSERTED.** Each and every

provision of law and clause required by law to be inserted in this Agreement shall be deemed to be inserted and this Agreement shall be read and enforced as though it were included. If through mistake or otherwise, any provision is not inserted or is not correctly inserted, then upon application of either Party, the Agreement shall be amended to make the insertion or correction. All references to statutes and regulations shall include all amendments, replacements, and enactments in the subject which are in effect as of the date of this Agreement, and any later changes which do not materially and substantially alter the positions of the Parties.

20. **ASSIGNMENT AND SUCCESSORS.** Neither District nor Contractor shall, without the prior written consent of the other Party, assign the benefit or in any way transfer their respective obligations under this Agreement. This Agreement shall inure to the benefit of and be binding upon the Parties hereto and, except as otherwise provided herein, upon their executors, administrators, successors, and assigns.
21. **SEVERABILITY.** In the event that any provision of this Agreement shall be construed to be illegal or invalid for any reason, said illegality or invalidity shall not affect the remaining provisions hereof, but such illegal or invalid provision shall be fully severable and this Agreement shall be construed and enforced as if such illegal or invalid provision had never been included herein, unless to do so would frustrate the intent and purpose of this Agreement.
22. **FORCE MAJEURE.** No Party shall be liable to any other Party for any loss or damage of any kind or for any default or delay in the performance of its obligations under this Agreement (except for payment obligations) if and to the extent that the same is caused, directly or indirectly, by fire, flood, earthquake, elements of nature, epidemics, pandemics, quarantines, acts of God, acts of war, terrorism, civil unrest or political, religious, civil or economic strife, or any other cause beyond a Party's reasonable control.
23. **VENUE/GOVERNING LAWS.** This Agreement shall be governed by the laws of the State of California and venue shall be in the County and/or federal judicial district in which District's principal administrative office is located.
24. **ATTORNEY'S FEES.** If suit is brought by either Party to enforce any of the terms of this Agreement, each Party shall bear its own attorney's fees and costs.
25. **EXHIBITS.** All Exhibits referred to in this Agreement are incorporated in this Agreement and made a part of this Agreement as if fully set forth herein.
26. **ENTIRE AGREEMENT.** This Agreement represents the entire agreement between District and Contractor and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended or modified only by an agreement in writing, signed by both District and Contractor.
27. **MODIFICATION.** This Agreement may be amended at any time by the written agreement of District and Contractor.
28. **WAIVER.** Waiver of a breach or default under this Agreement shall not constitute a continuing waiver of a subsequent breach of the same or any other provision under this Agreement.
29. **AUTHORITY.** The individual executing this Agreement on behalf of Contractor warrants that he/she is authorized to execute the Agreement on behalf of Contractor and that Contractor will be bound by the terms and conditions contained herein.
30. **HEADINGS AND CONSTRUCTION.** Headings at the beginning of each paragraph and subparagraph are solely for the convenience of the Parties and are not a part of the Agreement. Whenever required by the context of this Agreement, the singular shall include the plural and the masculine shall include the feminine and vice versa. This Agreement shall not be construed as if it had been prepared by one of the Parties, but rather as if both Parties had prepared the same. Unless otherwise indicated, all references to paragraphs, sections, subparagraphs, and subsections are to this Agreement.
31. **COUNTERPARTS.** This Agreement may be executed in counterparts, each of which shall be deemed an original, but all of which, together, when signed by all of the Parties hereto, shall constitute one and the same instrument. A facsimile or electronic signature shall be as valid as an original.

EXHIBIT D
to AGREEMENT FOR SERVICES

INSURANCE

1. Contractor shall procure and maintain at all times it performs any portion of the Services the following insurances with minimum limits equal to the amounts indicated below.
 - 1.1. **Commercial General Liability and Automobile Liability Insurance.** Commercial General Liability Insurance and Any Auto Automobile Liability Insurance that shall protect Contractor, District, and the State from all claims of bodily injury, property damage, personal injury, death, advertising injury, and medical payments arising performing any portion of the Services. (Form CG 0001 and CA 0001)
 - 1.2. **Workers' Compensation and Employers' Liability Insurance.** Workers' Compensation Insurance and Employers' Liability Insurance for all of its employees performing any portion of the Services. In accordance with provisions of section 3700 of the California Labor Code, Contractor shall be required to secure workers' compensation coverage for its employees. If any class of employee or employees engaged in performing any portion of the Services under this Agreement are not protected under the Workers' Compensation Statute, adequate insurance coverage for the protection of any employee(s) not otherwise protected must be obtained before any of those employee(s) commence performing any portion of the Services. Contractor shall sign and file with District the following certification prior to performing the work of the contract: "I am 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 I will comply with such provisions before commencing the performance of the work of this contract."
 - 1.3. **Professional Liability (Errors and Omissions).** Professional Liability (Errors and Omissions) Insurance as appropriate to Contractor's profession.

Type of Coverage	Minimum Coverage
Commercial General Liability Insurance , including Bodily Injury, Personal Injury, Property Damage, Advertising Injury, and Medical Payments Each Occurrence General Aggregate	\$1,000,000 \$1,000,000
Automobile Liability Insurance - Any Auto Each Occurrence General Aggregate	\$1,000,000 \$1,000,000
Professional Liability	\$1,000,000
Workers Compensation	Statutory Limits
Employer's Liability	\$1,000,000

2. Contractor shall not commence performing any portion of the Services until all required insurance has been obtained and certificates indicating the required coverage's have been delivered in duplicate to District and approved by District. Certificates and insurance policies shall include the following:
 - 2.1. A clause stating: "This policy shall not be canceled or reduced in required limits of liability or amounts of insurance until notice has been mailed to District, stating date of cancellation or reduction. Date of cancellation or reduction shall not be less than thirty (30) days after date of mailing notice."
 - 2.2. Language stating in particular those insured, extent of insurance, location and operation to which insurance applies, expiration date, to whom cancellation and reduction notice will be sent, and length of notice period.
 - 2.3. An endorsement stating that District and the State and their representatives, employees, trustees, officers, consultants, and volunteers are named additional insureds under all policies except Workers' Compensation Insurance, Professional Liability, and Employers' Liability Insurance. An

endorsement shall also state that Contractor's insurance policies shall be primary to any insurance or self-insurance maintained by District.

- 2.4. All policies shall be written on an occurrence form, except for Professional Liability which shall be on a claims-made form.



KING
CONSULTING

Response to Request for Proposals Regarding Master Planning Facility Master Planning

Prepared for:

Latrobe School District for Fiscal Year
2021-2023

Attention:

Jen Fusano

Chief Business Officer
jfusano@latrobeschool.com
530.677.0260

Primary Contact:

Jamie King-Iseman

President
jamie@kinginc.com
916-706-3538



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2.1 Cover Letter



July 12, 2021

Jen Fusano, Chief Business Official
Latrobe School District
7900 S. Shingle Road
Shingle Springs, California 95682

2901 35th St. Sacramento, CA
916.706-3538

581 E. 4th St. Chico, CA
530.899.9765

info@kinginc.com · kinginc.com

RE: Proposal for Facility Master Planning Consulting Services

Dear Ms. Fusano,

King Consulting is pleased to present the Latrobe School District with the enclosed proposals for Facility Master Planning Consulting Services. King Consulting, established in August 1998, has 23 years of experience in assisting school districts with the planning for and funding of school facilities.

The enclosed proposal aids the District with the following services:

1. Develop Conditions (Needs) Assessment
 - a. Evaluation of Current District Facilities
 - b. Develop Future Facilities Needs and Alternatives
2. Capacity and Utilization Study and Determination of Eligibility for State Funding
3. Educational and Maintenance Specifications
4. Cost Estimates
5. Final Document and Presentation to the Governing Board

These services would be provided at the rate of \$185.00 per hour. We would welcome the opportunity to utilize our experience to support and assist the District in meeting its school facilities planning and funding needs. Please call if you have any questions or need additional information.

Sincerely,

A handwritten signature in black ink, appearing to read 'Jamie King-Iseman', with a long horizontal flourish extending to the right.

Jamie King-Iseman
President
King Consulting

2.2 Business Information

Company name:

King Consulting

Number of employees:

6

Address:

2901 35th St., Sacramento, CA 95817

Telephone:

916-706-3538

Fax:

N/A

Website:

www.kinginc.com

Name and email of main contact:

Jamie King-Iseman, jamie@kinginc.com

Federal tax I.D. number:

46-0601254

License information including number and expiration date:

N/A

Business structure:

S Corporation

A brief description and history of the firm:

King Consulting was established in 1997 by Vice President & Director of Philanthropy Cheryl King and President Jamie King-Iseman as a comprehensive school facilities consulting firm, and has assisted hundreds of school districts throughout California and the nation. Everyone at King loves what they do and channels their enthusiasm into producing the highest quality work for our clients. King offers a wide array of consulting services in Demographics, Financial Services, and Facilities Planning.

Number of current projects and present workload and where possible, projected workload for the period in question, for those individuals proposed to work the District's project:

King Consulting has 25 current clients for whom we provide ongoing School Facility Funding support and strategy. Our present and projected workload allows the time and commitment provide the same high level of service for your District. Due to the size of our small firm and emphasis on personal attention to our client's needs, we believe we are unique to school facility planning and funding consulting. Our firm's commitment to establishing a collaborative working relationship with school district personnel, as well as timely and cost-effective delivery of services, allows us to provide planning and funding strategies and services in a cost effective and timely manner that meets your District's specific needs.

Location of office where the bulk of services solicited will be performed:

2901 35th St. Sacramento, CA 95817

Proof of Errors and Omission insurance and coverage amounts:

Please see attached Professional Liability Insurance with the required coverage (2.8).

2.3 Project Approach

Project Approach and Scope of Services

This document represents an agreement between **Latrobe School District** herein referred to as the Client, and **King Consulting**, herein referred to as the Contractor.

For the compensation stipulated, the Contractor shall provide the following scope of services:

Facility Master Planning Services

Develop a Long Range Deferred Maintenance Plan, Educational Plan and Facility Assessment

1. Campus Facility Assessment: Our team of Architects and Engineers will walk all campuses and perform a room by room condition assessment of all your facilities and building systems (mechanical, electrical, plumbing, etc.).
2. Facility Assessment Report: Our team will develop an Major Deferred Maintenance report that outlines each room and building system including each element's estimated date of construction, remaining useful life, and projected replacement cost and year.
3. Identification of Upcoming Deferred Maintenance Project: Utilizing the facility assessment our team will identify deferred maintenance needs and project replacement dates for all building systems (based on each elements expected useful life). We will then couple this information with known maintenance needs.
4. Create Facility Database: The information gathered during the facility assessment will then be used to develop a facility database for Lemon Grove School District. This database will allow the District to proactively move forward in addressing upcoming deferred maintenance needs.
5. Calculation of the District's pupil capacity, including a comparison of capacity values utilizing various assumptions on classroom loading and room uses.
6. Review and align educational specifications, update and/or establish to reflect District's facilities standards and educational goals.

Financial Analysis

Research and analyze all potential local, State, and Federal funding sources to support the implementation of the Facility Master Plan.

1. Review, prepare and submit documentation required to maximize the District's New Construction and Modernization eligibility under the State School Facility Program.
2. Obtain from the District facilities and enrollment information required to determine the amount of state modernization and new construction grant funding eligibility under the State School Facility Program.
3. Review site diagrams for square footage, classroom counts, age of facilities. Prepare and update facility capacity database annually to include any new additional facilities.
4. Prepare required enrollment and facilities reports for District review and approval to file with the Office of Public School Construction to seek approval of Modernization and New Construction eligibility. Prepare annual updated enrollment and facilities reports as needed or required.
5. Secure State Allocation Board approval of District's eligibility.
6. Research all available additional local and Federal sources of funding including but not limited to local Developer Fees, FEMA, PG&E On-Bill Financing, State Water Resource Control Board, EPA, and others.

Facility Master Planning Services

Preparation of Study Document

Preparation of a Facility Master Plan that includes a prioritized list of known maintenance needs as well as their estimated construction cost, possible funding sources, and proposed year of completion. Provide draft plan for review by district staff and the governing board.

Finalized Plan and School Board Presentation

1. Incorporate any draft revisions into a final Facility Master Plan.
2. Present final document to governing board.

Consulting Fees

For the services outlined the Client shall pay King Consulting on a time and material basis at the hourly rate of \$185.00. Fee estimates for services are outlined below. King Consulting will bill the Client in increments of 15 minutes, and invoice on a monthly basis. The fees shall cover all normal business expenses incurred on behalf of the Client. Necessary visitations to the District by the Consultant will be reimbursed on an actual and necessary basis. Reimbursed visitations shall have prior approval from the District.

The scope of the work necessary to complete the services listed in this Agreement is dependent on the availability and quality of the District's enrollment and facilities information and subject to SB 50 regulations.

The Client shall be responsible for reviewing and verifying all data included in documents, forms and reports prepared by the Contractor on behalf of the Client. The Client shall be responsible for meeting any certification requirements and shall be responsible for consulting legal counsel as related to the preparation and submittal of documents, forms and reports.

The terms of this agreement shall remain in force unless mutually amended. This agreement may be terminated by either party upon 30 days written notice.

ADDITIONAL CONSIDERATIONS

The Consultant shall be reimbursed as follows:

1. Necessary visitations to the District by the Consultant will be reimbursed on an actual and necessary basis. Reimbursed visitations shall have prior approval from the District.
2. Reproduction of documents shall be the responsibility of the District. If the District chooses, the Consultant will provide duplicating services on an actual cost basis.
3. Express mail expenses will be documented and reimbursed to the Consultant.
4. Application filing fees and other state required fees are the responsibility of the District.

2.4 Relevant Experiences and References

Relevant Experience

King Consulting is an established and recognized school facility planning firm. We offer a wide array of services to assist school districts of all sizes across California and the nation with their school planning needs and funding opportunities. Our work includes the completion of long-range master plans, boundary studies, demographic studies, enrollment projection studies, developer fee justification studies (both Level I and Level II), developer mitigation, and State/Local/Federal eligibility and funding applications. For the past twenty-three years, King Consulting has worked with clients throughout California and the nation.

Our professional, enthusiastic staff has over 80 years of combined experience. We are a small firm, with only highly experienced staff who excel in their specific areas of expertise. Our combined experience has resulted in our firm's ability to adhere to timelines and organize projects so that the client's needs are exceedingly met. While we specialize in managing and summarizing complex data analyses, we pride ourselves on our unique ability to disseminate the information to our clients and their stakeholders. We are always excited for the opportunity to meet in person or over the phone to clearly explain anything needed to our clients' staff, school board, and community. Our clients receive information within a broader context that includes full narrative explanations that school district staff and school board members repeatedly reference throughout the year.

While we excel in all areas of school facility planning, we are most proud of the lasting relationships we form with our clients. We care about our school districts, and we get to know them intimately through the course of our work. For this reason, so many of our clients work with us year after year: King Consulting digs deeper and tries harder in every aspect of our work because we become personally invested in the districts with whom we work.

Working together with our clients, we have secured over \$1Billion in Local, State and Federal dollars for California school districts over the past 23 years.

Current and Recent Projects

1. Napa Valley Unified School District, SFP Facility Hardship Applications Funded in 2020-2021
 - a. Napa Junction Elementary \$11,780,097
 - b. Snow Elementary \$8,546,627
2. Vallejo Unified School District, Updated Modernization Eligibility
 - a. Districtwide \$42,287,423
3. Wheatland Union High School District, Facility Master Plan
 - a. Local, State & Federal Funding Analysis
 - b. 10-Year Maintenance Plan (Master Planning Services)
4. Paradise Unified School District, State Allocation Board Appeal (In Progress)
 - a. Approximately \$24,000,000
5. East Nicolaus Union High School District, All SFP Programs and Developer Mitigation (Master Planning Services)

2.4 Relevant Experiences and References

References

Castro Valley Unified School District

4400 Alma Avenue
Castro Valley, CA 94546

Contact:

Sharon Trieu-Quince,
Director of Facilities

Phone: 510.537.3000 x6903

Paradise Unified School District

6696 Clark Rd.
Paradise, CA 95969

Contact:

David McCready, Assistant Superintendent,
Business Services

Phone: 530.872.6400 x1233

Chico Unified School District

163 E. 7th St.
Chico, CA 95928

Contact:

Julie Kistle, Director,
Facilities and Construction

Phone: 530.891.3410

Pleasanton Unified School District

4750 First St.
Pleasanton, CA 94566

Contact:

John Chwastyk, Executive Director
of Facilities and Construction

Phone: 925.426.4281

Napa Valley Unified School District

2425 Jefferson St,
Napa, CA 94558

Contact:

Rob Mangewala, Assistant Superintendent,
Business Services

Phone: 707.253.3533



Administrative Offices
1163 East Seventh Street
Chico, CA 95928-5999
530.891.3000
WWW.CHICOUSD.ORG

December 31, 2020

To Whom It May Concern,

I highly recommend King Consulting for both State School Facility Program and Demographic Analysis services. Our District has received high quality work from King Consulting for nearly 16 years. We have continued our long-term relationship with King Consulting because of their conscientious attitude, attention to detail, and exemplary analysis and reporting.

Our District has received funding from most State School Facility Programs thanks to King Consulting's thoroughness and attentiveness. King Consulting works hard to locate all potential funding sources for every facility project, and oftentimes finds funding that we wouldn't have known about otherwise. Their extensive knowledge on State regulations and close relationships with State agencies has directly benefitted us many times and resulted in significant additional funding.

Our annual Demographic Analysis study, prepared by King Consulting since 2004, guides our District by providing a comprehensive view of our community and highly accurate enrollment projections. Each year King Consulting adds to and improves our analysis, demonstrating the enthusiasm they have for their work. While these studies are lengthy and involve complex data and analyses, King Consulting excels at presenting the information clearly and concisely for our Board, District staff and our community members.

In addition to high quality work, the King Consulting staff is always available. If we ever need additional assistance, or just need a quick question answered, King Consulting has always promptly done what we have asked of them. It's great to know you can depend on your consultant do an outstanding job on their contracted work and remain totally responsive as additional needs arise.

The data they provide, both State funding information and Demographic Analyses, ultimately creates for a stronger relationship with our community. Recently King Consulting assisted us with the difficult task of redistricting our elementary school boundaries. Our community understood the difficult position we were in and why we needed to change boundaries much more thanks to King Consulting's analysis and reporting at our facility/community meetings and Board presentations.

In short, I could not imagine a better consultant for Demographic Analysis or State School Facility Program work. We look forward to continuing our long-term relationship with King Consulting and wholeheartedly recommend them to anyone.

If you have any questions, please do not hesitate to contact me.

Sincerely,

A handwritten signature in blue ink that reads "Julia M. Kistle".

Julia Kistle
Director, Facilities and Construction
Chico Unified School District



NAPA VALLEY
UNIFIED SCHOOL DISTRICT

Rosanna G. Mucetti, Ed. D.
Superintendent

Michael Pearson
Assistant Superintendent of Operations

Rob Mangewala
Assistant Superintendent of Business Services

Transforming Lives by Instilling and Inspiring Lifelong Learning in Every Student

April 22, 2020

To Whom It May Concern

It is my pleasure to write this letter of recommendation for King Consulting, Inc.

King Consulting has been providing a wide range of services to Napa Valley Unified School District (NVUSD) since 2004. This letter will refer to my personal experience with the firm, since arriving as the Assistant Superintendent of Business Services on July 1, 2019.

When first arriving at NVUSD the Executive Leadership Team was faced with many critical decisions that primarily involved school closures, attendance area realignments, and a reprioritization of bond projects, including the cancelation of the construction of a new middle school. King Consulting provided all of the necessary data and analysis we needed to make these processes successful.

Specifically Rob Murray, Director of Demographics and Planning, provided invaluable data analysis, presentation, dissemination to the community and Board of Trustees, and was able to defend the report under public and political pressure. Besides being a joy to work with, Rob is independent, a take-charge person, who is able to solve problems and present creative ideas, which can be quite challenging in the context of our tightly regulated systems. His ability to present complex situation in "plain English" is both rare and incredibly helpful.

The entire King Consulting Team's analytical skills, organizational abilities, work ethic, energy and creativity in tackling issues and evaluating alternatives will add immediate value.

Our annual Demographic Analysis study, prepared by King Consulting since 2004, guides our District by providing a comprehensive view of our community and highly accurate enrollment projections. Each year King Consulting adds to and improves our analysis, demonstrating the enthusiasm they have for their work. While these studies are lengthy and involve complex data and analyses, King Consulting excels at presenting the information clearly and concisely for our Board, District staff and our community members.

I am highly confident in King's Consulting to provide data to make data-based decisions. They have a unique ability to provide complex data in a manner that is easily communicated to stake holders. They stand behind their data and have the ability to also present the data to multiple audiences. Their experience uniquely qualifies them to provide demographic data and analysis.

We look forward to continuing our long-term relationship with King Consulting and wholeheartedly recommend them to anyone.

If you have any question please do not hesitate to contact me, rmangewala@nvusd.org.

Sincerely,

DocuSigned by:

12A55EF8E958419
Rob Mangewala
Assistant Superintendent of Business Services

1616 Lincoln Ave. Napa, CA 94558 | (707) 253-6281 | www.nvusd.org/711

ROSS VALLEY SCHOOL DISTRICT

110 Shaw Drive, San Anselmo, CA 94960 | Phone: 415.454.2162 | Fax: 415.454.6840 | www.rossvalleyschools.org

Superintendent: Dr. Rick L. Bagley | Board of Trustees: Annelise Bauer • Anne Capron • Ryan O'Neil • Wesley Pratt • Mark Reagan

August 21, 2019

RE: LETTER OF RECOMMENDATION FOR KING CONSULTING

To Whom it May Concern,

Ross Valley School District has had the pleasure of working with King Consulting for approximately 15 years. The staff at King Consulting is professional and especially knowledgeable in their individual area of expertise. The staff dive deep to assist in getting to the right answers for the best possible outcome.

King Consulting has assisted the District with many critical functions, including establishing eligibility for State bond funding, demographic studies and enrollment projections, assistance in submissions to OPSC, and DSA project closeouts and reporting. They leave nothing to chance, including hand delivering time-sensitive documents to OPSC/DSA to ensure they make it into the right hands.

Last year, King Consulting assisted our District in a successful appeal to the State Allocation Board (SAB) for new construction funding that would have otherwise been denied by OPSC under the 'new' rules. King Consulting knew who to work with in Sacramento and connected us with other partners who could assist us. In the end, this meant \$3 million to our small district (reimbursing the District for a \$21 million middle school).

We feel very fortunate to be working with King Consulting! Should you have any questions, please don't hesitate to contact us.

Sincerely,

Midge Hoffman
Chief Business Official
Ross Valley School District
(415) 451-4075

BROOKSIDE • HIDDEN VALLEY • MANOR • WADE THOMAS • WHITE HILL

2.5 Project Team Summary

We offer a wide array of services to assist school districts of all sizes across California with planning needs and funding opportunities; we also sub-consult with other school facility partners.

Our firm is made up of highly experienced staff who excel in their specific areas of expertise. Together, we have over 80 years of combined experience in capital facilities funding, demographic research, and long-range facility planning.

We specialize in managing and summarizing complex data analyses, and take pride in our unique ability to disseminate the information to our clients and their stakeholders.

Our ability to adhere to timelines and organize projects means our client's needs are always met and our flexible contract structures cater to the type of services they need.

1. Hourly, never to exceed
2. Contingency
3. Flat Rate

The key team members assigned to this project will be:

Jamie Iseman, President
23 Years Relevant Experience
23 Years with Firm

Jennifer Gibb, Director of Finance
and Business Development
13 Years Relevant Experience
1 Year with Firm

Evelyn Shafer, Director of State Funding
21 Years Relevant Experience
21 Years with Firm

Specific expertise is outlined in the following resumes.



Jamie King-Iseman

President

2901 35th St. Sacramento, CA 95817
jamie@kinginc.com · 916-706-3538

Education

Master of Science, Geography

University of South Carolina, 2001

Bachelor of Science, Geography

Sacramento State University, 1999

Skills

- Develops Facility Master Plans utilizing comprehensive analysis of all school sites, coordinating with architects/project managers, analyzing facility capacity and projecting future enrollment by site (both residents and enrollments)
- Creates consolidation scenarios utilizing demographic analysis of communities and districts
- Develops and analyzes school boundary scenarios for school districts
- Works closely with District staff and project managers, architects, etc. to develop criteria for optimizing current and future facility usage

Professional Summary

Jamie has over 22 years of experience working with school districts to develop their facilities and annual projections. As the President and Co-Founder of King Consulting, she's determined to discover new opportunities and funding for her clients and firmly believes all children deserve the opportunity to learn safely and efficiently. These core values in conjunction with Jamie's extensive experience make her uniquely qualified at solving the problems school districts face every day.

Experience

President

1998-present | King Consulting, Inc., Sacramento, CA

Utilizes historical and current information to assist public school districts in California, Washington, and Arkansas develop facility master plans. Maximizes State and district funding by analyzing current and projected community and school demographics, develops spatial analyses, and projects individual and districtwide enrollments. Assisted hundreds of clients successfully obtain over \$1 billion dollars in capital outlay funds for public school facilities in California.

Project development

2000-2001 | South Carolina Geographic Alliance, South Carolina

Developed computer programs to assist in the teaching of Geography to K-12 students.



Jennifer Gibb

Director of Finance & Business Development

2901 35th St. Sacramento, CA 95817

jennifer@kinginc.com · 916-706-3538

Education

Business Executives Leadership Program, CBO Certification

California Association of School Business Officials (CASBO) and Association of California School Administrators (ACSA), 2019

School Facilities Leadership Academy

California's Coalition for Adequate School Housing (CASH) and Fiscal Crisis Management and Assistance Team (FCMAT), 2018

Bachelor of Science, Business Administration: Concentration in Finance

Sonoma State University, 2006

Skills

- Secures State and Federal funding by leveraging locally funded projects
- Creates financial and administrative documents for key-stakeholders
- Creates systems to help improve inventory and accounting efficiencies: reducing inventory risk
- Develops various financial documents: monthly, quarterly, and annually including: Balance Sheet, Income Statement, Statement of Cash Flows, P&L Actual to Budget Analysis; 990, Audit and Consolidated Financial Reports; Budget and Statement of Mapped Assets

Professional Summary

Jennifer is a versatile and knowledgeable finance professional. experienced in fund accounting and budgeting for LEAs. Her project competence includes comprehensive and thorough fiscal analysis and reporting on a variety of projects within a multi-faceted organization. She is motivated and personable with a passion for encouraging and empowering team members and has a demonstrated history of success in completion of priorities that achieve organizational objectives.

Experience

Director of Finance & Business Development

2020-present | King Consulting, Inc., Sacramento, CA

Utilizes industry knowledge, skills, and experience as project manager and finance lead for facility use, planning, new construction and modernization, to provide the best facilities for public schools.

Facilities Financial Analyst

2008-2013, 2016-2020 | Napa Valley Unified School District, Napa, CA

Managed over \$500M in facilities funding with the development, monitoring, and analysis of project budget, revenue and expenditures. Oversaw funding principles and practices related to facilities, planning and construction; including general obligation bonds, developer fees, state facilities funds and special reserves. With extensive experience in project management, led team responsible for implementation of Measure H, including District staff, consultants and contractors. Ensured all laws, regulations and District goals were met and compliant with audit (performance and financial) requirements.



Evelyn Shafer-King

Director of School Facility Funding

2901 35th St. Sacramento, CA 95817
evelyn@kinginc.com · 916-706-3538

Education

Business Degree

Illinois Central College, 1995

Skills

- Researches current State regulations and funding requirements for various State programs to maximize district funding
- Prepares school district funding analysis by site and districtwide
- Calculates new construction eligibility districtwide and by HSAA to ensure maximize funding
- Calculates current modernization funding by site and analyzes future funding by site
- Analyzes and calculates special program eligibility (seismic, facility hardship, charter, financial hardship, etc.)
- Develops scenarios to maximize funding from State agencies
- Prepares and submits applications for funding in conjunction with district staff
- Coordinates State agency applications and ensures receipt of funds

Professional Summary

Evelyn has over 16 years of experience in the school facility financing arena serving as a liaison between school districts, architects, and State agencies. Her tailored services include assisting public school districts in facility planning, acquiring funding for planning, constructing new buildings, renovating existing buildings, and other facility needs.

Experience

Director of School Facility Funding

2000-present | King Consulting, Inc., Sacramento, CA

Assists public school districts with school facility planning; maximizes and secures funding for school construction projects by projecting student population, facility needs, and mapping work. Prepares Level 1 Developer Fee Justification Studies and School Facility Needs Assessments to assist Districts in mitigating the impact of students generated from residential and commercial development projects.

2.6 Fee Estimates

Facility Master Planning Services

Consulting Fees

For the services outlined the Client shall pay King Consulting on a time and material basis at the hourly rate of \$185.00. Fee estimates for services are outlined below.

The District shall pay the Consultant at the rate of \$185 per hour for services outlined in this Agreement, fees of \$25,975.

2.7 Litigation History

King Consulting has no history of litigation, arbitration or negotiated settlements. We have never been involved with a civil judgment or criminal conviction for false claims, fraud, or other matters involving lack of trustworthiness or honesty. Neither King Consulting or any employee of King Consulting is a party to an existing dispute with an owner, owner's representative, or contractor.

2.8 Insurance

Please see attached documents, pp. 19-22.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
03/19/2021

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 have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

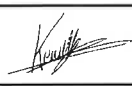
PRODUCER Hiscox Inc. d/b/a/ Hiscox Insurance Agency in CA 520 Madison Avenue 32nd Floor New York, NY 10022	CONTACT NAME: PHONE (A/C, No, Ext): (888) 202-3007 FAX (A/C, No): E-MAIL: contact@hiscox.com ADDRESS:	
	INSURER(S) AFFORDING COVERAGE INSURER A : Hiscox Insurance Company Inc	NAIC # 10200
INSURED J. M. King Consulting Inc. 2901 35th Street Sacramento CA 95817	INSURER B :	
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> CGL is on BOP Form GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			UDC-1558227-BOP-21	03/19/2021	03/19/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 0 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ S/T Gen. Agg. \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			UDC-1558227-BOP-21	03/19/2021	03/19/2022	COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below			N/A			PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

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

CERTIFICATE HOLDER 	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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JMKIN-1

OP ID: DV

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/28/2020

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 have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Wasserman & Associates Insurance Brokers, Inc. PO Box 19970 Sacramento, CA 95819-3915 Rick Wasserman	916-739-0254	CONTACT NAME: Rick Wasserman
		PHONE (A/C, No, Ext): 916-739-0254
		FAX (A/C, No): 916-733-0622
		E-MAIL ADDRESS:
		INSURER(S) AFFORDING COVERAGE
		INSURER A: Sequoia Insurance Company
		INSURER B:
		INSURER C:
		INSURER D:
		INSURER E:
		INSURER F:

INSURED
 J. M. King Consulting, Inc.
 2901 35th Street
 Sacramento, CA 95817

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADCL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER <input type="checkbox"/> POLICY <input type="checkbox"/> PRO <input type="checkbox"/> LOC <input type="checkbox"/> OTHER						EACH OCCURRENCE \$ DAMAGE TO RELATED PREMISES (Each Occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADJ INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Per accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in IL) <input type="checkbox"/> If yes describe under DESCRIPTION OF OPERATIONS below.	Y/N	N/A	QWC1122434	10/30/2020	10/30/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E - EACH ACCIDENT \$ 1,000,000 E - DISEASE - EA EMPLOYEE \$ 1,000,000 E - DISEASE - POLICY LIMIT \$ 1,000,000

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

CERTIFICATE HOLDER

CANCELLATION

Blank space for Certificate Holder information.

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

R Wasserman

ACORD 25 (2016/03)

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2.9 Signature page

This Agreement is between the Latrobe School District and King Consulting.



Jen Fusano

Chief Business Official
Latrobe School District

Jamie King-Iseman

President
King Consulting

Date

Date

Latrobe School District

Board Resolution #21-04

Certification of Signatures

As clerk/secretary to the governing board of the above named school district, I certify that the signatures shown below in Column 1 are of the members of the governing board. I certify that the signatures as shown in column 2 are the verified signatures of the person or persons authorized to sign notices of employment, contracts and orders drawn on the funds of the district. These certifications are made in accordance with the provision of Education Code Sections:

K-12 Districts: 35143, 42632, and 42633

Community College Districts: 72000, 85232, and 85233

If persons authorized to sign orders as shown in Column 2 are unable to do so, the law requires the signatures of the majority of the governing board. These approved signatures are valid for the period of July 1, 2021 to June 30, 2022, in accordance with governing board approval dated July 20, 2021.

Column 1 Signatures of Members of the Governing Board	Column 2 Signatures of Personnel and/or Members of Governing Board authorized to sign Orders for Salary, or Commercial Payments, Notices of Employment and Contracts.
Signature:	Signature:
Typed Name: James Scot Yarnell	Typed Name: Dave Scroggins
Title: President	Title: Superintendent/Principal

Signature:	Signature:
Typed Name: Janet Saitman	Typed Name: Jennifer Fusano
Title: Clerk	Title: Chief Financial Officer

Signature:	Signature:
Typed Name: Geene Alhady	Typed Name:
Title: Member	Title:

Approval: _____
Scot Yarnell, President of the Board

Date: _____

4.B.

Latrobe School District
Personnel Action Report

July 20, 2021

Name	Position	Time	Effective	Action
Ussery, Drake	K-8 PE Teacher	.4162 FTE (77 days)	8/9/2021	Employment: Column 3, Step 4 of Certificated Salary Schedule

4.C.

Latrobe School District
PROJECTED ENROLLMENT 2021-22

7/16/2021

Grade	2020-21	(+) New	(-) Leaving	2021-22 Projected
TK		5		5
K	3	9	(2)	10
1	15	5	(2)	18
2	16	2		18
3	14	2	(1)	15
Total Latrobe		23	(5)	66
4	10	1	(1)	10
5	26	3	(2)	27
6	17	5		22
7	19	2	(1)	20
8	22	3		25
Total Miller's Hill		14	(4)	104
Projected Total 2021-22				170
<i>Previous Year 2020-21</i>				<i>155</i>

One TK to
1st