

Client Name: Ocean View School District of Orange County
Client # 17150 /S15

P.O. # _____

AGREEMENT FOR SPECIAL SERVICES
Fiscal and Management Information Services

This is an Agreement between the **CLIENT**, as defined above, and **SCHOOL SERVICES OF CALIFORNIA INC.**, hereinafter referred to as "Consultant," entered into as of May 1, 2022.

RECITALS

WHEREAS, the Client needs assistance regarding issues of school finance, legislation, school budgeting, and general fiscal issues, and the state-mandated program cost claims process; and

WHEREAS, the Consultant is professionally and specially trained and competent to provide these services; and

WHEREAS, the authority for entering into this Agreement is contained in Section 53060 of the Government Code and such other provisions of California law as may be applicable;

NOW, THEREFORE, the parties to this Agreement do hereby mutually agree as follows:

1. The Consultant agrees to perform such duties relating to issues of school finance, including:
 - a. Electronic delivery of the *Fiscal Report* containing information on issues of school finance, budgets, or practices and policy issues that impact local educational agency fiscal policies, and access to the *Analysis of the Governor's Proposals for the State Budget and K-12 Education*
 - b. An analysis of all major school finance/fiscal legislation and reports on its legislative/executive branch progress
 - c. Participation at the Consultant's school finance conferences and workshops at the Consultant's client rate
 - d. Counsel the Client on new mandates and information relating to the local mandate reimbursement process for all applicable legislation already adopted that contains a reimbursement appropriation, and maintain liaison with the State Controller, the Commission on State Mandates, and the State Department of Finance
2. The Consultant shall provide the Client with services as requested to a total of 12 direct service hours during the 12-month period of this Agreement at no additional cost beyond the annual fee. The hours of service may be used as the Client directs on fiscal and mandate service issues, including mandate counseling, analysis of specific local educational agency revenue or expenditure issues, analysis of specific legislative or regulatory issues, including a "quick query" service to provide telephone response to specific fiscal or mandate questions of the Client.

Services for which the base service hours may not be used, include: Client specific economy, efficiency, or management consulting services, including, but not limited to efficiency or management studies, demographic or school facility studies, special education studies, fiscal health analysis, and/or an in-depth budget review, direct collective

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bargaining or factfinding assistance; fiscal analysis for purposes of collective bargaining, legislative representation or advocacy; appearance as an expert witness; provision of depositions or declarations for local educational agency legal issues; major customized research projects or studies; or, on-site speeches or presentations.

3. The Client agrees to pay to the Consultant for services rendered under this Agreement:
 - a. \$4,080 annually, plus expenses, or payable at \$340 per month, plus expenses, for the services listed in Item 1 above, upon billings from the Consultant
 - b. For all requested services in excess of 12 direct service hours as indicated in Item 2 above in the 12-month period, the applicable hourly rate for the person(s) performing the services shall apply
 - c. "Hours" are defined as hours of direct service to the Client, as well as reasonable travel time to and from the Client's site
 - d. "Expenses" are defined as actual, out-of-pocket expenses, such as travel, meals, shipping, and duplication of materials

4. The term of this contract shall be for the period of one year, beginning May 1, 2022, and terminating April 30, 2023. Agreement may be terminated prior to April 30, 2023, by either party on 30 days' written notice. In the event that the Client elects to terminate services at the end of the Agreement, the Client shall give a 30-day written notice of nonrenewal. The Consultant will provide continuing services for 90 days after the expiration date of the Agreement or until the Client provides written notice. The Client is responsible for these accrued charges and the Consultant may bill these additional days. In case of cancellation, the Client shall be liable for any costs accrued to the date of cancellation under Item 2 above.

5. It is expressly understood and agreed to by both parties that the Consultant, while carrying out and complying with any of the terms and conditions of this Agreement, is an independent contractor and is not an employee of the Client.



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IN WITNESS WHEREOF, the parties have caused this Agreement to be executed as indicated below:

By: _____ Date: 04/06/2022
Keith Farrow, Assistant Superintendent,
Administrative Services
Ocean View School District of Orange County

By:  _____ Date: March 21, 2022
John D. Gray
President/CEO
School Services of California Inc.



Contract period: 5/1/22 to 4/30/23

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Ordering a CADIE and/or SABRE? Yes No

As a client of School Services of California Inc., you have the option of purchasing either or both of our CADIE and SABRE reports at the client rate. The following information describes the CADIE and SABRE reports, and the form at the bottom of the page to order the reports.

The Comparative Analysis of District Income and Expenditures (CADIE) is a comprehensive computer-generated report comparing your district's revenues and expenditures to those of 40 other districts (two reports with 20 districts in each) of your choice throughout the state. Well over 300 comparisons are made using SACS, CBEDS and CalPads data.

The CADIE includes comparative graphic data expenditures by ADA, tabular information showing per ADA and percentage distribution of district revenues and expenditures, staffing levels, and tables that show—on an ADA and percentage basis—how your district spent its dollars for the prior three years. The report is comprehensive, yet easy to use.

The Salary And Benefits Report (SABRE) is generated from the CDE's Certificated Teachers Salary and Benefit data (Form J-90) and provides up to 38 side-by-side comparisons of your district with those of 40 other districts (two reports with 20 districts in each) of your choice on certificated salaries, health and welfare benefits, and work days.

The SABRE includes ten graphical displays and 27 comparison tables with side-by-side analysis for certificated non-management. It also includes the actual salary and benefit schedules and other selected data important for compensation evaluation in an easy-to-read format.

The analytical uses of the CADIE and SABRE reports are unlimited. If these products are needed for negotiations, they may be fully reimbursable as part of your mandated cost claim if you have chosen to file mandate claims for this year.

WITH PURCHASE, YOU ARE ENTITLED TO TWO CADIES AND TWO SABRES

Please check the appropriate items below: Current year 2020-21 Next year 2021-22**

Electronic Version:

CADIE only \$500
 SABRE only \$350
 CADIE & SABRE \$800

Hardcopy Version:

CADIE only \$600
 SABRE only \$450
 CADIE & SABRE \$1000

Select either:

Use the same districts as last year

OR two of the following:

- Use districts of similar type and size
 Use districts geographically close to mine
 Use districts with similar unduplicated pupil percentage

Reports are a year behind as the data is released by the CDE.

**This year: SABRE will be released in December 2022, CADIE will be released in March 2023

District Name: Ocean View School District
 Contact Name: Keith Farrow, Assistant Superintendent, Administrative Services
 Address (no P.O. boxes please): 17200 Pinehurst Lane
Huntington Beach, CA 92647
 Telephone with extension: 714-847-2551, ext. 1413
 Email Address: kfarrow@ovsd.org

Signature: _____

Print Name: Keith Farrow Date: 04/06/2022

By completing this Addendum A and submitting with our contract, the Client agrees to pay for these reports upon receipt of the products and appropriate billing.