

ATTACHMENT 2 CONTRACT TERMS

EXHIBIT A - STANDARD PROVISIONS

1. INDEMNIFICATION

The Contractor shall indemnify, defend (with counsel satisfactory to the State), and save harmless the State and its officers, agents, and employees from any and all claims and losses accruing or resulting to any and all other contractors, Subcontractors, suppliers, and laborers, and any other person, firm, or corporation furnishing or supplying Work, Materials, Data, or services in connection with the performance of this Agreement, and from any and all claims and losses accruing or resulting to any person, firm, or corporation who may be injured or damaged by the Contractor or its agents or employees in the performance of this Agreement.

2. RELATIONSHIP OF PARTIES

The Contractor and the agents and employees of the Contractor, in the performance of this Agreement, shall act in an independent capacity and not as officers, employees, or agents of the State of California.

3. TERMINATION FOR CAUSE

A. Pursuant to this provision, the State may terminate this Agreement in whole or in part under any one of the following circumstances, by issuing a written Notice of termination for default to the Contractor:

- i. If the Contractor (a) fails to perform the services within the time specified herein or any extension thereof, (b) fails to perform any requirements of this Agreement, or (c) so fails to make progress as to endanger performance of this Agreement in accordance with its terms, and, after receipt of a written Notice from the State specifying failure due to any of the preceding three (3) circumstances, the Contractor does not cure such failure within a period of five (5) business days or a longer period, if authorized in the Notice of failure; or,
- ii. If the Contractor should cease conducting business in the normal course, become insolvent or bankrupt, make a general assignment for the benefit of creditors, admit in writing its inability to pay its debts as they mature, suffer or permit the appointment of the receiver for its business or assets, merge with or be purchased by another entity, or avail itself of or become subject for a period of thirty (30) Days to any proceeding under any statute of any State authority relating to insolvency or protection from the rights of creditors.

B. In the event the State terminates this Agreement in whole or in part, due to the Contractor's failure to perform, the State may procure, upon such terms and in such manner as it may deem appropriate, supplies or services similar to those so terminated, and the Contractor

shall be liable to the State for any excess costs for such similar supplies or services, subject to the limitations contained elsewhere herein; further, the Contractor shall continue the performance of this Agreement to the extent not terminated under this provision.

- C. The Contractor shall not be liable for any excess costs if the failure to perform the Agreement arises out of acts of Force Majeure; but in every case, the failure to perform must be beyond the control and without the fault or negligence of the Contractor.
- D. If, after Notice of termination for default of this Agreement, it is determined for any reason that the Contractor was not in default under this provision, or that the default was excusable under this provision, the obligations of the State shall be to pay only for the services rendered at the rates set forth in the Agreement.
- E. The rights and remedies of either party provided in this provision shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Agreement.

4. NO ASSIGNMENT

Without the written consent of the State, the Contractor shall not assign this Agreement in whole or in part.

5. TIME OF ESSENCE

Time is of the essence in Contractor's performance of this Agreement.

6. VALIDITY OF ALTERATIONS

Alteration or variation of the terms of this Agreement shall not be valid unless made in writing and signed by the parties, and an oral understanding or agreement that is not incorporated shall not be binding on any of the parties.

7. CONSIDERATION

The consideration to be paid to the Contractor under this Agreement shall be compensation for all the Contractor's expenses incurred in the performance of this Agreement, including travel and per diem, unless otherwise expressly provided.

END OF EXHIBIT

ATTACHMENT 2 CONTRACT TERMS

EXHIBIT B - SPECIAL PROVISIONS

1. DEFINITIONS

Terms defined below and elsewhere throughout the Contract Documents shall apply to the Agreement as defined.

- A. **“Acceptance”** refers to the written acceptance issued to the Contractor by the State after the Contractor has completed a Deliverable, Submittal or other Contract requirement, in compliance with the Contract Documents, including without limitation, *Exhibit D, Work to be Performed*, and *Exhibit F, Acceptance of the Work and Sign-off Form*.
- B. **“Administrative Director”** refers to that individual or authorized designee, empowered by the State to make final and binding executive decisions on behalf of the State.
- C. **“Amendment”** refers to a written document issued by the State and signed by the Contractor, which alters the Contract Documents and identifies the following: (i) a change in the Work; (ii) a change in Contract Amount; (iii) a change in time allotted for performance; and/or (iv) an adjustment to the Agreement terms.
- D. **“Confidential Information”** refers to trade secrets, financial, statistical, personnel, technical, and other Data and information relating to the State’s business or the business of its constituents. Confidential Information does not include: (i) information that is already known by the receiving party, free of obligation of confidentiality to the disclosing party; (ii) information that becomes generally available to the public, other than as a result of disclosure by the receiving party in breach of this Agreement; (iii) information that is independently developed by the receiving party without reference to the Confidential Information; and (iv) information that the receiving party rightfully obtains from a Third Party free of the obligation of confidentiality to the disclosing party.
- E. The **“Contract”** or **“Contract Documents”** constitute the entire integrated agreement between the State and the Contractor, as attached to and incorporated by a fully executed Standard Agreement Coversheet. The terms **“Contract”** or **“Contract Documents”** may be used interchangeably with the term **“Agreement.”**
- F. **“Contract Amount”** refers to the total amount encumbered under this Agreement for any payment by the State to the Contractor for performance of the Work, in accordance with the Contract Documents.
- G. The **“Contractor”** refers to the individual, association, partnership, firm, company, consultant, corporation, affiliates, or combination thereof, including joint ventures, contracting with the State to do the Contract Work. The Contractor is one of the parties to this Agreement.

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- H. “**Contractor Works**” shall have the meaning set forth in Exhibit B’s provision entitled “Ownership of Data, Materials and Deliverables,” sub-paragraph 20.
- I. “**Data**” refers to all types of raw data, articles, papers, charts, records, reports, studies, research, memoranda, computation sheets, questionnaires, surveys, and other documentation.
- J. “**Day**” refers to a calendar day, unless otherwise specified.
- K. “**Deliverable(s)**” or “**Submittal(s)**” refers to one or more items, if specified in the Contract Documents, that the Contractor shall complete and deliver or submit to the State for acceptance.
- L. “**Force Majeure**” refers to a delay which impacts the timely performance of Work which neither the Contractor nor the State are liable for because such delay or failure to perform was unforeseeable and beyond the control of the party. Acts of Force Majeure include, but are not limited to:
- i. Acts of God or the public enemy;
 - ii. Acts or omissions of any government entity;
 - iii. Fire or other casualty for which a party is not responsible;
 - iv. Quarantine or epidemic;
 - v. Strike or defensive lockout; and,
 - vi. Unusually severe weather conditions.
- M. “**Key Personnel**” refers to the Contractor’s key personnel or Subcontractor named in *Exhibit E, Contractor’s Key Personnel*, whom the State has identified and approved to perform the Work of the Contract. Qualifications of Key Personnel are represented by the resumes set forth in *Exhibit E, Contractor’s Key Personnel*. Responsibilities of Key Personnel are set forth in *Exhibit D, Work to be Performed*.
- N. “**Material**” refers to all types of tangible personal property, including but not limited to goods, supplies, equipment, commodities, and information and telecommunication technology.
- O. “**Notice**” refers to a written document initiated by the authorized representative of either party to this Agreement and given by:
- i. Depositing in the U. S. Mail (or approved commercial express carrier) prepaid to the address of the appropriate authorized representative of the other party, which shall be effective upon date of receipt; or
 - ii. Hand-delivered to the other party’s authorized representative, which shall be effective on the date of service.
- P. The “**State**” refers to the Judicial Council of California, Administrative Office of the Courts. The State is one of the parties to this Agreement.

- Q. “**Standard Agreement Coversheet**” refers to the form used by the State to enter into agreements with other parties. Several originally signed, fully executed versions of the Standard Agreement Coversheet, together with the integrated Contract Documents, shall each represent the Agreement as an individual “**Contract Counterpart.**”
- R. “**Steering Committee**” refers to the committee created from representatives of the AOC, County Welfare Directors’ Association of California (CWDA), California Department of Social Services (CDSS), California Social Work Education Center (CalSWEC), California Court Appointed Special Advocates (CalCASA), California Child Welfare Co-Investment Partnership, and a youth advocacy organization) to consult on the Work and to review and clarify necessary background and other relevant information.
- S. “**Stop Work Order**” refers to the written Notice, delivered in accordance with this Agreement, by which the State may require the Contractor to stop all, or any part, of the Work of this Agreement, for the period set forth in the Stop Work Order. The Stop Work Order shall be specifically identified as such and shall indicate that it is issued pursuant to the Stop Work provision in this *Exhibit B*.
- T. “**Subcontractor**” refers to an individual, firm, partnership, or corporation having a contract, purchase order, or agreement with the Contractor, or with any Subcontractor of any tier for the performance of any part of the Agreement. When the State refers to Subcontractor(s) in this document, for purposes of this Agreement and unless otherwise expressly stated, the term “Subcontractor” includes, at every level and/or tier, all subcontractors, sub-consultants, suppliers, and materialmen.
- U. “**Task(s)**” refers to one or more functions, if specified in the Contract Documents, to be performed by the Contractor for the State.
- V. “**Third Party**” refers to any individual, association, partnership, firm, company, corporation, consultant, Subcontractor, or combination thereof, including joint ventures, other than the State or the Contractor, which is not a party to this Agreement.
- W. “**To Be Determined**” or “**TBD**” is the item that is not yet identified. Any and all To Be Determined items, set forth herein, shall be determined prior to award or by mutual agreement between the Contractor and the State and incorporated into the Agreement via Amendment(s).
- X. “**Work**” or “**Work to be Performed**” or “**Contract Work**” may be used interchangeably to refer to the service, labor, Materials, Data, and other items necessary for the execution, completion and fulfillment of the Agreement by the Contractor to the satisfaction of the State. Work may be defined to include Tasks, Deliverables, and/or Submittals, as required by the Contract.

2. MANNER OF PERFORMANCE OF WORK

The Contractor shall complete all Work specified in these Contract Documents to the State's satisfaction and in compliance with the Non-discrimination/No Harassment Clause, as set forth in

this *Exhibit B*.

3. TERMINATION OTHER THAN FOR CAUSE

- A. In addition to termination for cause under *Exhibit A, Standard Provisions, paragraph 3*, the State may terminate this Agreement at any time upon providing the Contractor written Notice at least ten (10) Days before the effective date of termination. Upon receipt of the termination Notice, the Contractor shall promptly discontinue all services affected unless the Notice specifies otherwise.
- B. If the State terminates all or a portion of this Agreement other than for cause, the State shall pay the Contractor for the fair value of satisfactory services rendered before the termination, not to exceed the total Contract Amount.

4. STATE'S OBLIGATION SUBJECT TO AVAILABILITY OF FUNDS

- A. The State's obligation under this Agreement is subject to the availability of authorized funds. The State may terminate the Agreement or any part of the Contract Work, without prejudice to any right or remedy of the State, for lack of appropriation of funds. If expected or actual funding is withdrawn, reduced or limited in any way prior to the expiration date set forth in this Agreement, or in any Amendment hereto, the State may terminate this Agreement in whole or in part, upon written Notice to the Contractor. Such termination shall be in addition to the State's rights to terminate for convenience or default.
- B. Payment shall not exceed the amount allowable for appropriation by Legislature. If the Agreement is terminated for non-appropriation:
 - i. The State will be liable only for payment in accordance with the terms of this Agreement for services rendered prior to the effective date of termination; and
 - ii. The Contractor shall be released from any obligation to provide further services pursuant to the Agreement as are affected by the termination.
- C. Funding for this Agreement beyond the current appropriation year is conditional upon appropriation by the Legislature of sufficient funds to support the activities described in this Agreement. Should such an appropriation not be approved, the Agreement may terminate at the close of the current appropriation year. The appropriation year ends on June 30 of each year.
- D. Notwithstanding any provision of this Agreement to the contrary, a default or breach of this Agreement shall not occur if the AOC is unable to pay any amount owed hereunder because of the State of California's failure to timely approve and adopt a State budget. Should the AOC fail to pay any amount as a result of the State of California's failure to timely approve and adopt a State budget, the AOC shall promptly pay any previously due and unpaid amounts upon approval and adoption of the State budget.

5. STOP WORK

- A. The State may, at any time, by written Notice to the Contractor, require the Contractor to stop all, or any part, of the Work of this Agreement, for a period up to ninety (90) Days after the Notice is delivered to the Contractor, and for any further period to which the parties may agree. The Stop Work Order shall be specifically identified as such and shall indicate it is issued under this provision. Upon receipt of the Stop Work Order, the Contractor shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the Work covered by the Stop Work Order during the period of Work stoppage. Within a period of ninety (90) Days after a Stop Work Order is delivered to the Contractor, or within any extension of that period to which the parties shall have agreed, the State shall either:
- i. Cancel the Stop Work Order; or
 - ii. Terminate the Work covered by the Stop Work Order as provided for in either of the termination provisions of this Agreement.
- B. If a Stop Work Order issued under this provision is canceled or the period of the Stop Work Order or any extension thereof expires, the Contractor shall resume Work. The State shall make an equitable adjustment in the delivery schedule, the Contract Amount, or both, and the Agreement shall be modified, in writing, accordingly, if:
- i. The Stop Work Order results in an increase in the time required for, or in the Contractor's cost properly allocable to the performance of any part of this Agreement; and
 - ii. The Contractor asserts its right to an equitable adjustment within thirty (30) Days after the end of the period of Work stoppage; however, if the State decides the facts justify the action, the State may receive and act upon a proposal submitted at any time before final payment under this Agreement.
- C. If a Stop Work Order is not canceled and the Work covered by the Stop Work Order is terminated in accordance with the Termination Other Than For Cause provision or the State's Obligation Subject to Availability of Funds provision, as set forth under this *Exhibit B*, the State shall allow reasonable costs resulting from the Stop Work Order in arriving at the termination settlement.
- D. The State shall not be liable to the Contractor for loss of profits because of the Stop Work Order issued under this provision.

6. AGREEMENT ADMINISTRATION/COMMUNICATION

- A. Under this Agreement, the AOC Project Manager shall monitor and evaluate the Contractor's performance. All requests and communications about the Work to be performed under this Agreement shall be made through the AOC Project Manager and the Contractor.

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- i. Any Notice from the Contractor to the State shall be in writing and shall be delivered to the AOC Project Manager as follows:

Judicial Council of California
Administrative Office of the Courts
_____[TBD]_____, AOC Project Manager
455 Golden Gate Avenue
San Francisco, CA 94102-3688

- ii. Other than for Notices, the AOC Project Manager may be contacted as follows:

Telephone: _____[TBD]_____
Facsimile: _____[TBD]_____
Email: _____[TBD]_____

- B. Notice to the Contractor shall be directed in writing to: _____[TBD]_____.

7. STANDARD OF PROFESSIONALISM

The Contractor shall conduct all work consistent with professional standards for the industry and type of work being performed under the Agreement.

8. EVALUATION OF CONTRACTOR

The State shall evaluate the Contractor's performance under the Agreement.

9. ACCEPTANCE OF THE WORK

- A. The AOC Project Manager shall be responsible for the sign-off acceptance of all the Work required and submitted pursuant to this Agreement. Prior to approval of the Work and prior to approval for payment, the AOC Project Manager will apply the acceptance criteria set forth in subparagraph B of this provision, as appropriate, to determine the acceptability of the Work provided by the Contractor. Unsatisfactory ratings will be resolved as set forth in this provision.
- B. Acceptance Criteria for Work (“**Criteria**”) provided by the Contractor pursuant to this Agreement:
 - i. Timeliness: The Work was delivered on time;
 - ii. Completeness: The Work contained the Data, Materials, and features required in the Contract; and
 - iii. Technical accuracy: The Work is accurate as measured against commonly accepted standard (for instance, a statistical formula, an industry standard, or de facto marketplace standard).

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- C. The Contractor shall provide the Work to the State, in accordance with direction from the AOC Project Manager. The State shall accept the Work, provided the Contractor has delivered the Work in accordance with the Criteria. The AOC Project Manager shall use the *Acceptance of the Work and Sign-off Form*, provided as *Attachment 1* to this Agreement's *Exhibit F, Attachments*, to notify the Contractor of the Work's acceptability.
- D. If the State rejects the Work provided, the AOC Project Manager shall submit to the Contractor a written rejection using *Attachment 1*, the *Acceptance of the Work and Sign-off Form*, describing in detail the failure of the Work as measured against the Criteria. If the State rejects the Work, then the Contractor shall have a period of ten (10) business days from receipt of the Notice of rejection to correct the stated failure(s) to conform to the Criteria.
- E. If the AOC Project Manager requests further change, the Contractor shall meet with the AOC Project Manager, within three (3) business days of such request, to discuss changes for the final submission of the Work. The Contractor shall provide the Work within three (3) business days after this meeting, at which time the Work is accepted or the question of its acceptability referred to the Administrative Director of the AOC and a principal of the Contractor, as set forth in *subparagraph F* below.
- F. If agreement cannot be reached between the AOC Project Manager and the Contractor on the Work's acceptability, a principal of the Contractor and the Administrative Director of the AOC, or its designee, shall meet to discuss the problem. If agreement cannot be reached, in the reasonable judgment of the Administrative Director of the AOC, or its designee, and/or the Contractor fails to cure such deficiencies that are perceived in the Work to the reasonable satisfaction of the Administrative Director, or its designee, in the reasonable time established by the Administrative Director, the State may reject the Work and will notify the Contractor in writing of such action and the reason(s) for so doing. Upon rejection of the Work, the State may terminate this Agreement pursuant to the terms of *Standard Provisions, paragraph 3*, as set forth in *Exhibit A*.

10. CONTRACTOR'S PERSONNEL AND REPLACEMENT OF PERSONNEL

- A. The State reserves the right to disapprove the continuing assignment of any of the Contractor's personnel provided to the State under this Agreement if in the State's opinion, either the performance of the Contractor's personnel is unsatisfactory, or continued assignment of any of the Contractor's personnel is not in the best interest of the State. The State agrees to provide Notice to the Contractor in the event it makes such a determination. If the State exercises this right, the Contractor shall immediately assign replacement personnel, possessing equivalent or greater experience and skills.
- B. If any of the Contractor's Key Personnel become unavailable, or are disapproved in accordance with *subparagraph A*, above, during the term of this Agreement, the Contractor shall immediately assign replacement personnel acceptable to the AOC

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Project Manager, possessing equivalent or greater experience and skills as that demonstrated in the resume set forth in *Exhibit E, Contractor's Key Personnel*.

- C. The Contractor shall endeavor to retain the same individuals assigned to the Work during the performance of the Work of this Agreement. However, the Contractor may, with approval of the AOC Project Manager, introduce personnel to the Work with specific skill sets or release personnel from the Work whose skill set is not needed at the time, except for the Contractor's Work contact.
- D. If any of the Contractor's Key Personnel become unavailable or are disapproved and the Contractor cannot furnish a replacement acceptable to the State, the State may terminate this Agreement for cause pursuant to *paragraph 3*, as set forth in *Exhibit A, Standard Provisions*.

11. ASSIGNMENTS OR SUBCONTRACTING

- A. This Agreement is based upon the unique expertise of the Contractor. Therefore, in addition to the prohibition against assignment under *Exhibit A - Standard Provisions, paragraph 4*, it is the policy of the State to withhold consent from proposed assignments, subcontracts, or novations when such transfer of responsibility would operate to decrease the State's likelihood of receiving performance under this Agreement. No performance of this Agreement or any portion thereof may be assigned or subcontracted by the Contractor without the express written consent of the State, and any attempt by the Contractor to assign or subcontract any performance of this Agreement without the express written consent of the State shall be void and shall constitute a breach of this Agreement. If the Contractor is authorized by the State to subcontract or assign, all the terms of this Agreement shall be included in such subcontract or assignment.
- B. Any substitution or prolonged absence of the personnel, who were specifically identified in the original proposal, as accepted, must be approved. Failure to obtain acceptance shall constitute a major breach of this Agreement.

12. SERVICES WARRANTY

The Contractor warrants and represents that each of its employees, independent contractors or agents assigned to perform any services or provide any technical assistance in planning, development, training, consulting or related services under the terms of this Agreement shall have the skills, training, and background reasonably commensurate with his or her level of performance or responsibility, so as to be able to perform in a competent and professional manner. The Contractor further warrants that the services provided hereunder will conform to the requirements of this Agreement. All warranties, including any special warranties specified elsewhere herein, shall inure to the State, its successors, assigns, customer agencies, and any other recipients of the services provided hereunder.

13. CHANGES AND AMENDMENTS

Changes or Amendments to any component of the Contract Documents can be made only with

prior written approval from the AOC Project Manager. Requests for changes or Amendments must be submitted in writing and must be accompanied by a narrative description of the proposed change and the reasons for the change. Additional funds may not be encumbered under the Agreement due to an act of Force Majeure, although the performance period of the Agreement may be amended due to an act of Force Majeure. After the AOC Project Manager reviews the request, a written decision shall be provided to the Contractor. Amendments to the Agreement shall be authorized via bilateral execution of a Standard Amendment Coversheet.

14. ACCOUNTING SYSTEM REQUIREMENT

The Contractor shall maintain an adequate system of accounting and internal controls that meets Generally Accepted Accounting Principles or GAAP.

15. RETENTION OF RECORDS

The Contractor shall maintain all financial Data, supporting documents, and all other records relating to performance and billing under this Agreement for a period in accordance with State and Federal law, a minimum retention period being no less than four (4) years. The retention period starts from the date of the submission of the final payment request. The Contractor is also obligated to protect Data adequately against fire or other damage.

16. AUDIT

The Contractor shall permit the authorized representative of the State or its designee or both at any reasonable time to inspect or audit all Data relating to performance and billing to the State under this Agreement. The Contractor further agrees to maintain such Data for a period of four (4) years after final payment under this Agreement.

17. INSURANCE REQUIREMENTS

- A. General. The Contractor shall obtain and maintain the minimum insurance set forth in subparagraph B, below. By requiring such minimum insurance, the State shall not be deemed or construed to have assessed the risks that may be applicable to the Contractor under this Agreement. The Contractor shall assess its own risks and if it deems appropriate and/or prudent, maintain greater limits and/or broader coverage. For full coverage, each insurance policy shall be written on an “occurrence” form; excepting that insurance for professional liability, when required, may be acceptable on a “claims made” form. If coverage is approved and purchased on a “claims made” basis, the Contractor warrants continuation of coverage, either through policy renewals or the purchase of an extended discovery period, if such extended coverage is available, for not less than three (3) years from the date of completion of the Work which is the subject of this Agreement.
- B. Minimum Scope and Limits of Insurance. The Contractor shall maintain coverage and limits no less than the following:
 - i. Workers' Compensation at statutory requirements of the State of residency.

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- ii. Employers' Liability with limits not less than \$1,000,000.00 for each accident.
 - iii. Commercial General Liability Insurance with limits not less than \$1,000,000.00 for each occurrence, Combined Single Limit Bodily Injury and Property Damage.
 - iv. Business Automobile Liability Insurance with limits not less than \$1,000,000.00 for each occurrence, Combined Single Limit Bodily Injury and Property Damage, including owned and non-owned and hired automobile coverage, as applicable.
- C. Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions must be declared to, and approved by, the State. The deductible and/or self-insured retention of the policies shall not limit or apply to the Contractor's liability to the State and shall be the sole responsibility of the Contractor.
- D. Other Insurance Provisions. The General Liability policy required in this Agreement is to contain, or be endorsed to contain, the following provisions:
 - i. The State, its officers, officials, employees and agents, as well as the officers, officials, employees and agents are to be covered as additional insureds as respects liability arising out of activities performed by or on behalf of the Contractor in connection with this Agreement.
 - ii. To the extent of the Contractor's negligence, the Contractor's insurance coverage shall be primary insurance as respects the State, its officers, officials, employees and agents, as well as the officers, officials, employees and agents. Any insurance and/or self-insurance maintained by the State, its officers, officials, employees or agents shall not contribute with the insurance or benefit the Contractor in any way.
 - iii. The Contractor's insurance shall apply separately to each insured against whom a claim is made and/or lawsuit is brought, except with respect to the limits of the insurer's liability.
- E. The Contractor shall provide the State certificates of insurance satisfactory to the State evidencing all required coverages before Contractor begins any Work under this Agreement, and complete copies of each policy upon the State's request.
- F. If at any time the foregoing policies shall be or become unsatisfactory to the State, as to form or substance, or if a company issuing any such policy shall be or become unsatisfactory to the State, the Contractor shall, upon Notice to that effect from the State, promptly obtain a new policy, and shall submit the same to the State, with the appropriate certificates and endorsements, for approval.
- G. All of the Contractor's policies shall be endorsed to provide advanced written Notice to the State of cancellation, nonrenewal, and reduction in coverage, within fifteen (15) Days, mailed to the following address: Judicial Council, Administrative Office of the Courts, Senior Manager, Business Services, 455 Golden Gate Avenue, 7th Floor, San Francisco, CA 94102-3688.

18. CONFIDENTIALITY

- A. Both the State and the Contractor acknowledge and agree that in the course of performing the Work under this Agreement, the State may disclose Confidential Information to the Contractor.
- B. The Contractor agrees not to disclose the Confidential Information to any Third Party and to treat it with the same degree of care as it would its own confidential information. It is understood, however, that the Contractor may disclose the State's Confidential Information on a "need to know" basis to the Contractor's employees and Subcontractors and, as directed by the AOC Project Manager, representatives of the State that are working on the Work. All such employees and Subcontractors of the Contractor shall have executed a confidentiality agreement with the Contractor requiring a promise of confidentiality concerning the Contractor's clients and business.
- C. The Contractor shall acquire no right or title to the Confidential Information. The Contractor agrees not to use the Confidential Information for any purpose except as contemplated pursuant to this Agreement. Notwithstanding the foregoing, the Contractor may disclose the Confidential Information (i) to the extent necessary to comply with any law, rule, regulation or ruling applicable to it; (ii) as appropriate to respond to any summons or subpoena applicable to it; or (iii) to the extent necessary to enforce its rights under this Agreement.

19. COPYRIGHTS AND RIGHTS IN DATA

All copyrights and rights in the Data produced with funding from this Agreement that may presumptively vest in the Contractor shall be transferred to the State.

20. OWNERSHIP OF DATA, MATERIALS AND DELIVERABLES

- A. **State Works.** As between the Contractor and the State, the State will be the sole and exclusive owner of all Works owned by the State as of the Effective Date or created by the State separate from this Agreement (collectively, the "**State Works**"). State Works include, but shall not be limited to, proprietary works of authorship, software, process or logic flowcharts, architecture designs, specifications, models, and documentation, as well as any associated Intellectual Property Rights. As of the Effective Date, the Contractor will be granted a limited, non-exclusive license during the term of the Agreement to use, access, copy, maintain, modify, enhance and create derivative works of the State Works solely as necessary for and for the sole purpose of providing the Services. The Contractor may not use State Works for any other purpose, and may not sublicense any rights with respect to such State Works. The Contractor will cease use of such State Works upon expiration or termination of this Agreement.
- B. **Rights in Developed Works.** The Contractor hereby irrevocably assigns all right, title, and interest, including without limitation any and all Intellectual Property Rights (all copyrights, including without limitation any renewal terms, patents, trademark, service mark, and/or trade name rights, trade-secret rights, and other proprietary rights), in and

to the works first created, made, developed, conceived, or reduced to practice in whole or in part, by or on behalf of the Contractor, the Contractor's agents or subcontractors, or any combination of the Contractor, the Contractor's agents or subcontractors, and the State in connection with the performance of the services of this Agreement, but excluding Contractor Works and Third Party Works, (including, without limitation, any modifications, enhancements and derivative works of the State Works) to the State of California. Accordingly, the State shall be entitled to access to and copies of any source code and any technical or user documentation relating to the Developed Works at all times, including during the progress of the work and upon completion of the work. The State may seek registration of its rights in and to the Developed Works, including without limitation copyright, trademark, service mark, and patent applications, in its own name, though it will not be obligated to do so.

- C. Contractor Works. As between the Contractor and the State, the Contractor will be the sole and exclusive owner of all Works owned by it as of the Effective Date or created by it separate from this Agreement (collectively, the "**Contractor Works**"). Contractor Works that may be used as part of Contractor's provision of Services include, but shall not be limited to, proprietary works of authorship that have not been created specifically for the State, including without limitation software, process or logic flowcharts, architecture designs, specifications, models, and documentation, as well as any associated Intellectual Property Rights ("**Contractor's Information**"). Upon introduction of any Contractor Works, the Contractor grants to the State and their subcontractors, without additional charge, (i) a perpetual, irrevocable (except as otherwise expressly provided in this paragraph), fully paid-up, non-exclusive license to use, copy, maintain, modify, enhance and create derivative of such Contractor Works (including, with respect to software, source code, and programmer interfaces) and to sublicense such rights to other entities; and (ii) with respect to Contractor Works that are software, copies of machine-readable and human-readable source code and technical documentation for such software. The foregoing license is subject to a right of revocation only upon the expiration or any whole or partial termination of this Agreement (following notice and a 45-day opportunity to cure) if the State has not made full payment of undisputed amounts properly due and owing to the Contractor.

21. LIMITATION ON PUBLICATION

The Contractor shall not publish or submit for publication any article, press release, or other writing relating to the Contractor's services for the State without prior review and written permission by the State.

22. LIMITATION OF LIABILITY

- A. The State shall not be responsible for loss of or damage to any non-State equipment arising from causes beyond the State's control.
- B. The Contractor indemnifies and holds harmless the State from and against all liability for personal injury or property damage caused by the Contractor's negligence or willful misconduct while performing its obligations pursuant to this Agreement on the State's

premises. Any expiration or termination of this Agreement shall not affect the continuing obligations of the parties described in this Agreement.

23. CONFLICT OF INTEREST

A. The Contractor and employees of the Contractor shall not participate in proceedings that involve the use of State funds or that are sponsored by the State if the person's partner, family, or organization has a financial interest in the outcome of the proceedings. The Contractor and employees of the Contractor shall also avoid actions resulting in or creating the appearance of (i) use of an official position with the government for private gain; (ii) preferential treatment to any particular person associated with this Agreement or the Work of this Agreement; (iii) loss of independence or impartiality; (iv) a decision made outside official channels; or (v) adverse effects on the confidence of the public in the integrity of the government or this Agreement.

B. The Contractor certifies and shall require any Subcontractor to certify to the following:

Former State employees will not be awarded a contract for two (2) years from the date of separation if that employee had any part of the decision making process relevant to the contract, or for one (1) year from the date of separation if that employee was in a policy making position in the same general subject area as the proposed contract within the twelve (12) month period of his or her separation from state service.

24. COVENANT AGAINST GRATUITIES

The Contractor warrants by signing this Agreement that no gratuities, in the form of entertainment, gifts, or otherwise, were offered by the Contractor or any agent, director, or representative of the Contractor, to any officer, official, agent, or employee of the State with a view toward securing the Contract or securing favorable treatment with respect to any determinations concerning the performance of the Contract. For breach or violation of this warranty, the State will have the right to terminate the Contract, either in whole or in part, and any loss or damage sustained by the State in procuring, on the open market, any items, which the Contractor agreed to supply, shall be borne and paid for by the Contractor. The rights and remedies of the State provided in this provision shall not be exclusive and are in addition to any other rights and remedies provided by law or under the Contract.

25. NATIONAL LABOR RELATIONS BOARD

By executing this Agreement, the Contractor certifies under penalty of perjury under the laws of the State of California that no more than one (1) final, unappealable finding of contempt of court by a federal court has been issued against the Contractor within the immediately preceding two (2) year period because of the Contractor's failure to comply with an order of the National Labor Relations Board.

26. DRUG-FREE WORKPLACE

The Contractor certifies that it will provide a drug-free workplace as required by California Government Code, Sections 8355-8357.

27. NON-DISCRIMINATION/NO HARASSMENT CLAUSE

- A. During the performance of this Agreement, the Contractor and its Subcontractors shall not unlawfully discriminate against any employee or applicant for employment because of race, religion, color, national origin, ancestry, physical or mental disability, medical condition, marital status, age (over 40), sex, or sexual orientation. The Contractor shall ensure that the evaluation and treatment of employees and applicants for employment are free of such discrimination.
- B. During the performance of this Agreement, the Contractor and its Subcontractors shall not engage in unlawful harassment, including sexual harassment, with respect to any persons with whom the Contractor or its Subcontractors interact in the performance of this Agreement. The Contractor and its Subcontractors shall take all reasonable steps to prevent harassment from occurring.
- C. The Contractor shall comply with applicable provisions of the Fair Employment and Housing Act, California Government Code, Section 12990 *et seq.*, and the applicable regulations promulgated under California Code of Regulations, title 2, Section 7285 *et seq.* The applicable regulations of the Fair Employment and Housing Commission implementing California Government Code, Section 12990, set forth in chapter 5 of division 4 of title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part of it as if set forth in full.
- D. The Contractor and any of its Subcontractors shall give written Notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other agreement.
- E. The Contractor shall include the nondiscrimination/no harassment and compliance provisions of this clause in any and all subcontracts issued to perform Work under the Agreement.

28. AMERICANS WITH DISABILITIES ACT

By signing this Agreement, Contractor assures the State that it complies with applicable provisions of the Americans with Disabilities Act (“ADA”) of 1990 (42 U.S.C. Section 012101 *et seq.*), which prohibits discrimination on the basis of disability, as well as with all applicable regulations and guidelines issued pursuant to the ADA.

29. CALIFORNIA LAW

This Agreement shall be subject to and construed in accordance with the laws of the State of California.

30. PERMITS AND LICENSES

The Contractor shall observe and comply with all federal, state, city, and county laws, rules, and regulations affecting services under this Agreement. The Contractor shall procure and keep in full force and effect during the term of this Agreement all permits and licenses necessary to accomplish the Work contemplated in this Agreement.

31. SEVERABILITY

If any term or provision of this Agreement is found to be illegal or unenforceable, this Agreement shall remain in full force and effect and that term or provision shall be deemed stricken.

32. WAIVER

The omission by either party at any time to enforce any default or right, or to require performance of any of this Agreement's terms, covenants, or provisions by the other party at the time designated, shall not be a waiver of the default or right, nor shall it affect the right of the party to enforce those provisions later.

33. SIGNATURE AUTHORITY

The parties signing this Agreement certify that they have proper authorization to do so.

34. SURVIVAL

The termination or expiration of the Agreement shall not relieve either party of any obligation or liability accrued hereunder prior to or subsequent to such termination or expiration, nor affect or impair the rights of either party arising under the Agreement prior to or subsequent to such termination or expiration, except as expressly provided herein.

35. ENTIRE AGREEMENT

This Agreement, consisting of all documents as defined herein, constitutes the entire agreement between the parties with respect to the subject matter hereof and shall supersede all previous proposals, both oral and written, negotiations, representations, commitments, writing, and all other communications between the parties. No waiver, alteration, modification of, or addition to the terms and conditions contained herein shall be binding unless expressly agreed in writing by a duly authorized representative of the State.

END OF EXHIBIT

ATTACHMENT 2 CONTRACT TERMS

EXHIBIT C - PAYMENT PROVISIONS

1. CONTRACT AMOUNT

- A. The total amount the State may pay to the Contractor under this Agreement for performing the Work set forth in *Exhibit D, Work to be Performed*, shall be the actual cost not to exceed the Contract Amount of [TBD], as set forth in this *Exhibit C*.

- B. The Contractor has estimated the costs and expenses necessary to complete the Work. The State's acceptance of the Contractor's proposal and price does not (i) imply that the State approves of or adopts the Contractor's plan, means, methods, techniques, or procedures required to perform the Work, nor (ii) relieve the Contractor from the sole responsibility for the accuracy of its estimate and timely completion of the Work of this Agreement within the total amount for compensation set forth herein.

2. COMPENSATION FOR CONTRACT WORK

- A. For performing the Work of this Agreement, as set forth in *Attachment 2 Contract Terms, Exhibit D - Work to be Performed*, the State shall compensate the Contractor at the rate(s) set forth in Table 1, below, not to exceed the amount per Deliverable nor the estimated due date per Deliverable, as set forth in Table 2, below.

Table 1: Hourly Rates for Each of Contractor's Key Personnel and Other Personnel/Job Functions

1. Key Personnel	Hourly Rate
1.A [TBD]	[TBD]
1.B [TBD]	[TBD]
1.C [TBD]	[TBD]
2. Other Personnel/Job Functions	Hourly Rate
2.A [TBD]	[TBD]
2.B [TBD]	[TBD]
2.C [TBD]	[TBD]

[Remainder of page left blank intentionally]

Table 2: Due Dates and Not to Exceed Amounts

Deliverable No.	Due Date	Not to exceed Amount
1	[TBD]	[TBD]
2	[TBD]	[TBD]
3	[TBD]	[TBD]
4	[TBD]	[TBD]
5	[TBD]	[TBD]
6	[TBD]	[TBD]
7	[TBD]	[TBD]
8	[TBD]	[TBD]
9	[TBD]	[TBD]

- B. Except for the specific travel expenses set forth in paragraph 3, below, the hourly rate set forth in Table 1, above, includes all costs, benefits, expenses, fees, overhead, and profits payable to the Contractor for services rendered to the State.
- C. The Contractor shall not charge nor shall the State pay any overtime rate.
- D. The Contractor shall not request nor shall the State consider any reimbursement for non-production work including but not limited to time spent traveling to and from the job site or any living expenses.
- E. The total actual cost which the State may reimburse the Contractor, pursuant to this provision, shall not exceed [\$TBD].

3. COMPENSATION FOR TRANSPORTATION, MEALS, LODGING AND ADMINISTRATIVE AND OPERATING EXPENSES

- A. The State shall reimburse the Contractor for the following transportation, meals, and lodging expenses.
 - i. The State shall reimburse the Contractor for actual expenses incurred for reasonable and necessary transportation, meals, lodging, and other travel-related expenses required performing the Work of this Agreement.
 - ii. The Contractor shall submit a written travel plan to the AOC Project Manager *prior to incurring any travel expenses*, including the reason for the trip, number of persons traveling, types of expenses the Contractor expects to incur and the estimated costs. Prior approval of the travel plan is required.
 - iii. For necessary air transportation, the State will reimburse the Contractor for the actual cost incurred. All air transportation is limited to coach fares and must be

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booked a minimum of fourteen (14) days prior to travel, unless the AOC Project Manager agrees otherwise in writing.

- iv. For overnight travel, in accordance with the California Victim Compensation and Government Claims Board (formerly State Board of Control) guidelines, the State will reimburse the Contractor for meal and lodging expenses in an amount not to exceed **\$150.00** per day, plus sales tax. Meals shall be reimbursed at the actual cost not to exceed the following maximum amounts per person per Day: breakfast~**\$6.00**; lunch~**\$10.00**; dinner~**\$18.00**; and/or incidentals~**\$6.00**. Hotel room rental shall be reimbursed for the actual cost not to exceed **\$110.00** per Day plus tax and/or energy surcharge. Within the counties of Alameda, San Francisco, San Mateo, and Santa Clara, the maximum rate is **\$140.00** (per day per person), plus tax and energy surcharge.
- v. Reasonable ground transportation expenses will be reimbursed at applicable IRS approved rate per mile. Airport parking will be reimbursed based on the State-approved airport economy parking policy.
- vi. Upon AOC Project Manager's request, the Contractor shall provide copies of receipts for reimbursement of transportation, lodging, and meal expenses.
- vii. The total actual cost which the State may reimburse the Contractor, pursuant to this provision, shall not exceed [**\$TBD**].

B. Administrative and Operating Expenses

- i. The State shall reimburse the Contractor for itemized administrative and operating expenses that are reasonably incurred in performing this Agreement, if the AOC Project Manager approves them. These expenses may include transcription, tapes, postage/ mailing and reasonable costs.
- ii. The total actual cost which the State may reimburse the Contractor, pursuant to this provision, shall not exceed [**\$TBD**].

4. DIRECT EXPENSES

All fees and charges noted in this Agreement are inclusive of any and all anticipated travel, lodging, transportation, clerical support, Materials, fees, overhead, profits, and other costs and/or expenses incidental to the performance of the specified requirements under this Agreement.

5. OTHER EXPENSES

The State shall not consider reimbursement for costs not defined as allowable in this Agreement, including but not limited to any administrative and operating expenses incurred during the performance of this Agreement.

6. TAXES

The State is exempt from federal excise taxes and no payment will be made for any taxes levied on the Contractor's or any Subcontractor's employees' wages. The State will pay for any applicable State of California or local sales or use taxes on the services rendered or equipment or parts supplied pursuant to this Agreement.

7. METHOD OF PAYMENT

- A. The Contractor shall submit an invoice for Work provided no more often than monthly. After receipt of invoice, the State will either approve the invoice for payment or give the Contractor specific written reasons why part or all of the payment is being withheld and what remedial actions the Contractor must take to receive the withheld amount.
- B. The State will make payment in arrears after receipt of the Contractor's properly completed invoice. Invoices shall clearly indicate the following:
- i. The Contract number;
 - ii. An unique invoice number;
 - iii. The Contractor's name and address;
 - iv. A description of the completed Work, including services rendered, Task(s) performed, and/or Deliverable(s) made, as appropriate;
 - v. The dates and hours worked;
 - vi. The name of the Contractor's Key Personnel that performed the Work and the contractual charges, including the appropriate hourly rate;
 - vii. For reimbursable travel expenses, the name(s) of Contractor's Key Personnel that traveled, date of trip, destination, type of trip, and the actual reimbursable expense, as allowed under this Agreement; and
 - viii. A preferred remittance address, if different from the mailing address.
- C. The Contractor shall submit one (1) original and two (2) copies of invoices to:
- Judicial Council of California
Administrative Office of the Courts
c/o Finance Division, Accounts Payable
455 Golden Gate Avenue, 7th Floor
San Francisco, CA 94102-3688
- D. Please note that invoices or vouchers not on printed bill heads shall be signed by the Contractor or the person furnishing the supplies or services.

8. DISALLOWANCE

If the Contractor claims or receives payment from the State for a service or reimbursement that is

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later disallowed by the State, the Contractor shall promptly refund the disallowed amount to the State upon the State's request. At its option, the State may offset the amount disallowed from any payment due or that may become due to the Contractor under this Agreement or any other agreement.

END OF EXHIBIT

ATTACHMENT 2 CONTRACT TERMS

EXHIBIT D – WORK TO BE PERFORMED

1. TERM

The services are expected to be performed over a period of 16 weeks with the expiration date [TBD].

2. SCOPE OF SERVICES

The Contractor will be asked to develop a toolkit that includes the following components:

2.1. The Contractor will be asked to develop a toolkit that includes the following components:

2.1.1. Materials for AOC staff use, specifically:

2.1.1.1 A fact sheet for marketing FFE to juvenile courts and local court partners, including juvenile court judges, child welfare agency staff, CASA, attorneys, and other community partners (the audience); and

2.1.1.2 A PowerPoint presentation for AOC staff to introduce FFE to multidisciplinary audiences.

2.1.2 An initial self-assessment tool for participants to gauge the readiness of their individual counties to implement FFE practices.

2.1.3 A local protocol template that includes the following components:

2.1.3.1 Initial local target population for FFE implementation and suggested factors for audience members to consider in the selection of the initial target population;

2.1.3.2 Local expanded population for later phases of FFE implementation and suggested factors for audience members to consider in the selection of the expanded population;

2.1.3.3 Timelines for FFE implementation for initial target population and expanded population;

2.1.3.4 Assignment of roles and responsibilities for FFE activities, specifically between the local child welfare agency, minor's and parents' counsel, CASA, and other local child welfare service providers;

2.1.3.5 Selection of a participatory collaborative team model that includes a description of at least the five most prominent models and their pros and cons;

- 2.1.3.6 Confidentiality considerations that may arise from multiple system partners sharing information regarding children and youth in care; and
 - 2.1.3.7 Identification of a specific method and process for evaluating FFE implementation.
- 2.1.4. Interdisciplinary training curriculum on how to implement and evaluate FFE programs that includes:
- 2.1.4.1 Competencies, learning objectives, lesson plans, a trainer’s guide, a trainee guide, and all supporting materials; and
 - 2.1.4.2 Both distance and live training modality formats.
- Development of the training curriculum must be coordinated with the Steering Committee to ensure consistency. The training materials should be delivered in a format approved by the AOC Project Manager based on the CalSWEC format.¹
- 2.1.5. Assessment tools to measure the process and outcomes of FFE implementation:
- 2.1.5.1 Contact Child Trends (a research center that evaluates FFE practices) and all counties currently implementing FFE to obtain existing evaluation tools and outcome measures;
 - 2.1.5.2 Develop a baseline data collection tool to measure each county’s current FFE practices and capture county-level placement and permanency data;
 - 2.1.5.3 Develop a logic model for FFE implementation;
 - 2.1.5.4 Develop a process evaluation tool based on that logic model to enable counties to assess the fidelity with which the locally-implemented FFE programs adhere to a standardized FFE model;
 - 2.1.5.5 Develop satisfaction surveys to measure child, parent, extended-family, attorney, agency-staff, and volunteer assessment of the scope, nature, and success of local FFE implementation;
 - 2.1.5.6 Develop a technology guide to identify baseline data for child welfare and probation departments showing specifically what data can be obtained from the Child Welfare Service Case Management System (CWS/CMS);
 - 2.1.5.7 Identify the most efficient way for counties to capture the following data for children receiving FFE services:

¹ See: http://calswec.berkeley.edu/CalSWEC/CCCCA_About_Core.html for a current example of the CalSWEC format.

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- a) Race, ethnicity, and tribal ancestry;
- b) Reunification rates;
- c) Relative placement rates;
- d) Sibling placement rates;
- e) Adoption rates;
- f) Guardianship rates;
- g) Number of children in alternative planned permanent living arrangements;
- h) Number of relative and non-related “important individual” contacts identified;
- i) Number of permanent connections established;
- j) Number of children experiencing maltreatment when placed with a parent or relative;
- k) Reentry rates;
- l) Number of failed adoptions; and
- m) Number of failed guardianships.

2.2 The Contractor will be required to consult throughout the development and implementation of the Work as follows:

2.2.1 Meet on a regular basis throughout the contract period with the Steering Committee to consult on the Work and to review and clarify necessary background and other relevant information.

2.2.2 Attend one (1) meeting of the California Child Welfare Council’s Permanency Subcommittee to present concepts and drafts for feedback during the Work period. The meeting will be held in Los Angeles in December 2010, on a date unknown at this time.

2.3 DELIVERABLES AND DUE DATES: The Contractor will be asked to do the following, by the dates listed to the right of the Deliverable:

2.3.1 Deliverable 1: Meeting with AOC Project Manager and Steering Committee

Deliverable	Due Date
In-person meeting and consultation with AOC Project Manager and Steering Committee as identified in section 2.2.1 of this Exhibit D. Submit a written summary of meeting including outlines for Deliverables 2-5 to AOC Project Manager.	[TBD]
Second in-person meeting. Submit a written summary of meeting to AOC Project Manager and Steering Committee.	

2.3.2 Deliverable 2: Fact Sheet for Marketing FFE

Deliverable	Due Date
Submit a fact sheet to AOC Project Manager and Steering Committee for marketing FFE to juvenile courts and local court partners, including juvenile court judges, child welfare agency staff, CASA, attorneys, and other community partners (the audience).	[TBD]

2.3.3 Deliverable 3: PowerPoint Presentation to Introduce FFE

Deliverable	Due Date
Submit a PowerPoint presentation to AOC Project Manager and Steering Committee for AOC staff to introduce FFE to multidisciplinary audiences.	[TBD]

2.3.4 Deliverable 4: Initial Self-Assessment Tool

Deliverable	Due Date
Submit to AOC Project Manager and Steering Committee an initial self-assessment tool for audience members to gauge the readiness of their individual counties to implement FFE practices.	[TBD]

2.3.5 Deliverable 5: Local Protocol Template

Deliverable	Due Date
Submit to AOC Project Manager a local protocol template containing all elements required in section 2.1.3 of this Exhibit D.	[TBD]

2.3.6 Deliverable 6: Interdisciplinary Training Curriculum

Deliverable	Due Date
Coordinate with AOC Project Manager and Steering Committee to determine appropriate format and consistency of content for curriculum.	[TBD]
Submit to AOC Project Manager, in both distance and live-training formats, an interdisciplinary training curriculum meeting all requirements set forth in section 2.1.4 of this Exhibit D.	

2.3.7 Deliverable 7: Assessment Tools

Deliverable	Due Date
Submit to AOC Project Manager tools for assessing the success of FFE implementation meeting all requirements set forth in section 2.1.5 of this Exhibit E.	[TBD]

2.3.8 Deliverable 8: Draft and Final Materials

Deliverable	Due Date
Written Deliverables 2-7, as identified above, will constitute initial draft materials due as specified to AOC Project Manager. Revised materials will be submitted to AOC Project Manager at this time.	[TBD]

2.3.9 Deliverable 9: Wrap-up and Compilation

Deliverable	Due Date
Contractor will be available on an on-going basis to respond to any questions regarding draft materials that arise during review by the AOC Project Manager or Steering Committee. Submit a report of questions received and their responses to AOC Project Manager that include conclusions and recommendations.	[TBD]

3. AUTHORITY AND APPROVAL

The Contractor is not authorized to make final and binding decisions or approvals on behalf of the State. As required in this Agreement, the Contractor will obtain the necessary approvals from the AOC Project Manager and/or the Senior Manager of Business Services as may be required.

4. MONTHLY WORK STATUS

The Contractor shall submit quarterly Work status reports to the AOC Project Manager, describing work performed, work status, work progress difficulties encountered, remedial actions, and statement of activity anticipated subsequent to reporting period for approval prior to payment of invoices. Invoices shall include, in detail, all costs and charges applicable.

5. CONTRACTOR RESPONSIBILITIES

The Contractor will have the following responsibilities under this Contract:

- i. Work closely with AOC Project Manager and Steering Committee;
- ii. Manage, prepare and refine the Contract’s Deliverables;
- iii. Proactively assist with resolution of issues regarding any aspect of the Work;

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- iv. Proactively anticipate Work deviations and be responsible for taking immediate corrective action; and
- v. Work with AOC Project Manager to manage and coordinate work and knowledge transfer.

6. CONTRACTOR'S KEY PERSONNEL RESPONSIBILITIES

The Contractor's Key Personnel will have the following responsibilities under this Contract:

- i. Work closely with the AOC Project Manager, as appropriate, to accomplish Deliverables;
- ii. Proactively assist with preparing and refining the Contract's Deliverables;
- iii. Proactively assist with identification and resolution of issues with any aspect of the Work; and
- iv. Assist with performing work and knowledge transfer.

7. AOC RESPONSIBILITIES

The AOC Project Manager will be responsible for managing, scheduling, and coordinating all Work activities, including Work plans, timelines, and resources, and escalating issues for resolution to AOC management.

END OF EXHIBIT

**ATTACHMENT 2
CONTRACT TERMS**

EXHIBIT E – CONTRACTOR’S KEY PERSONNEL

1. The following individual(s), or equivalent as approved pursuant to *Exhibit B, Special Provisions, paragraph 10, Contractor’s Personnel and Replacement of Personnel*, shall be the Key Personnel designated to perform the Work of this Agreement:

Contractor’s Key Personnel	Title
[TBD]	[TBD]
[TBD]	[TBD]
[TBD]	[TBD]

2. The Contractor intends to use the Work Management Consultant, as Contractor’s Subcontractor to be Contractor’s Key Personnel for the Work of this Agreement. By this reference, and pursuant to *Exhibit B, Special Provisions, paragraph 11, Assignments or Subcontracting*, the State hereby approves the use of the aforementioned named individual as the authorized and approved Subcontractor to be Contractor’s Key Personnel in performing the Work of this Agreement.
3. Contractor’s Key Personnel Resume(s) is attached below:

[TBD]

END OF FORM

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**EXHIBIT F
ATTACHMENTS**

This Exhibit F includes the following attachment:

Attachment 1, Acceptance of Work and Sign-off Form

[Remainder of page intentionally left blank]

END OF EXHIBIT

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**ATTACHMENT 1
ACCEPTANCE OF THE WORK AND SIGN-OFF FORM**

Description of Work provided by Contractor:

Date submitted: _____

Work is:

1) Submitted on time: yes no. If no, please note length of delay and reasons.

2) Complete: yes no. If no, please identify incomplete aspects of the Work.

3) Technically accurate: yes no. If no, please note corrections required.

Please note level of satisfaction:

Poor Fair Good Very Good Excellent

Comments, if any:

Work is accepted. Work is unacceptable as noted above.

Name: _____

Title: _____

Date: _____

END OF ATTACHMENT