



**REQUEST FOR QUALIFICATIONS (RFQ) #2026-3
CONSTRUCTION MANAGEMENT SERVICES**

Lodi Unified School District ("District") is requesting experienced and proven firms to submit their qualifications to provide construction management services for the District's Bond Measure and Capital Projects ("Projects").

RFQ RESPONSE SCHEDULE SUMMARY

At this time, and in accordance with Government Code 4525-4529.20, the District is requesting qualifications from respondents interested in being considered for Projects under this Program. A pool of qualified firms may be selected for future consideration to provide services for certain Projects.

The Request for Qualifications ("RFQ"), which includes instructions for its completion, is enclosed for your consideration. Respondents to this RFQ shall submit a completed Statement of Qualifications ("SOQ") and must conform and be responsive to the requirements set forth in this RFQ.

Respondents to this RFQ should mail or deliver five (5) bound copies and one (1) electronic copy on USB flash drive of their Statement of Qualifications ("SOQ") labeled "Statement of Qualifications in Response to Lodi Unified School District's RFQ #2026-3", as further described herein, to:

**Lodi Unified School District
Amberly Kidder, Facilities & Planning
RFQ #2026-3
880 N. Guild Avenue, Lodi CA 95240**

ALL RESPONSES ARE DUE BY 2:00 P.M. ON WEDNESDAY, JULY 8, 2026.

Any SOQ received after that date and time will not be accepted and will be returned unopened.

FAXED OR EMAILED RESPONSES WILL NOT BE ACCEPTED.

The District reserves the right to waive any informalities or irregularities in received submittals. Further, the District reserves the right to reject any and all submittals and to negotiate contract terms with one or more respondent firms for one or more of the work items. The District retains the sole discretion to determine issues of compliance and to determine whether a respondent is responsive, responsible, and qualified.

If you have any questions regarding this RFQ please contact Amberly Kidder at (209) 331-7223 akidder@lodiUSD.net before 4:00 P.m. on June 24, 2026. Answers will be posted on the District website by 4:00 P.m. on July 1, 2026.

The District reserves the right to change the dates on the schedule without prior notice.

DATE	EVENT	DEADLINE
June 13, 2026	Release and advertisement of RFQ	
June 24, 2026	Deadline for submission of written questions	4:00 p.m.
July 1, 2026	Addendum to RFQ, if required, published.	4:00 p.m.
July 8, 2026	Deadline for all submissions due.	2:00 p.m.
August 4, 2026	Board Award	
Week of August 5, 2026	Notification to selected firms.	

I. INTRODUCTION

Lodi Unified School District serves over 27,000 students. There are thirty-one elementary schools, five middle schools, four comprehensive high schools, two continuation high schools, and five other sites containing a variety of programs. Capital projects include modernization, new construction, safety upgrades, and infrastructure improvements subject to DSA oversight. The District may seek approval of additional bond measures in future election cycles and utilize the qualified firms submitted in response to this RFQ for future projects.

The District is seeking qualified Construction Management firms to provide comprehensive project management services to support the pre-construction and construction phases of these projects, ensuring they are delivered on schedule, within budget, and in compliance with all applicable regulatory requirements. This RFQ defines the construction management services sought and generally outlines the Projects' requirements.

The District's goal in issuing this RFQ is to select a pool of experienced proven construction management firms that can provide management of schedule, cost, quality, safety, and scope services. From there, the District intends to issue a request for proposals (RFP) in order to select one or more qualified firm(s) from that pool to provide said services to the District.

A. PROGRAM DESCRIPTION

The District's bond measure and capital projects will include:

1. repairing and upgrading aging schools District-wide; school safety and security upgrades; and technology and science modernization projects.
2. program infrastructure

Information regarding the District's capital projects may be found under the "Construction Projects" link at the top of all District Webpage under "About". The District's homepage is <http://www.lodiUSD.net>.

B. LIMITATIONS

The District reserves the right to contract with any entity responding to this RFQ. The District makes no representation that participation in the RFQ process will lead to an award of contract or any consideration whatsoever. The District shall in no event be responsible for the cost of

preparing a response to this RFQ. The awarding of a contract, if at all, is at the sole discretion of the District.

The District reserves the right to reject any or all SOQs, to waive any irregularities or informalities not affected by law, to evaluate each SOQ submitted, and to award contracts, if any, according to the SOQ which best serves the interest of the District at a reasonable cost to the District. Any contract(s) resulting from this RFQ, however, will be made according to the form of the Independent Consultant Master Agreement for Professional Services attached to this RFQ as **Appendix "A"**.

The Respondent's SOQ package, and any other supporting materials submitted to the District in response to this RFQ will not be returned and will become the property of the District unless portions of the materials are designated as proprietary at the time of submittal, and are specifically requested to be returned.

C. FULL OPPORTUNITY

The District hereby affirmatively ensures that Disadvantaged Business Enterprises ("DBE"), Small Local Business Enterprises ("SLBE"), Small Emerging Local Business Enterprises ("SELBE"), Disabled Veterans Business Enterprises ("DVBE"), and minority business enterprises shall be afforded full opportunity to submit SOQs in response to this RFQ, and will not be discriminated against on the basis of race, color, gender, sexual orientation, political affiliation, age, ancestry, religion, marital status, national origin, medical condition or disability in any consideration leading to the award of the contract. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise be subjected to discrimination in any consideration leading to the award of contract.

D. RESTRICTIONS ON LOBBYING AND CONTACTS

From the period beginning on the date of the issuance of this RFQ and ending on the date of the award of the contract, no person, or entity responding to this RFQ, nor any officer, employee, representative, agent, or consultant representing such a person or entity shall contact through any means or engage in any discussion regarding this RFQ, the evaluation or selection process/or the award of the contract(s) with any member of the District's Board of Education ("Board"), selection committee members, or any member of the Citizens' Oversight Committee, or with any employee of the District except for clarifications and questions as described herein. Any such contact shall be grounds for the disqualification of the entity submitting a SOQ.

E. POOL OF QUALIFIED APPLICANTS AND RECERTIFICATION

The District will maintain a pool of qualified construction management firm applicants. Requests for recertification may be sent every year. Firms who do not reply to the request for recertification may be deleted from the pool of prequalified firms, at the sole discretion of the District. Additional firms may be added to the pool, at the District's sole discretion, as the District determines the need for additional services.

II. SCOPE OF SERVICES

A. SUMMARY OF SCOPE OF SERVICES.

The Scope of Services includes full construction management services through the relevant phase of the Project(s). The Scope of Services shall also include comprehensive program and project management services from project planning through closeout, including pre-construction services, estimating, scheduling, constructability reviews, procurement support, construction administration, budget management, quality assurance, reporting, project closeout, and other related services as requested by the District. Services may be provided on an individual project basis or in support of the District's overall capital improvement and bond program. The Project construction management firm will also meet, as needed, with District Facilities staff, neighborhood organizations, and upper-level District administrators for programming guidance.

B. CONSTRUCTION MANAGEMENT QUALIFICATIONS

The ideal construction management team will have the following characteristics:

- Have successful experience with modernization, new construction, expansion, and renovation projects for California K-12 school districts on time within a tight timeline.
- Provide adequate staffing and resources to Project(s). Maintain key staff through the duration of Project(s).
- Have reasonable proximity to the City of Lodi in order to provide: (1) team working/review sessions during design; (2) ease of team coordination meetings; (3) minimal cost to attend District meetings; and (4) quick response to field issues.
- Work collaboratively with District and District's Authorized Representative.
- Be flexible in nature, with positive, can-do attitudes. Be solution-oriented.
- Be organized, effective and efficient. Exercise professional prioritization skills. Work easily with modern amenities like scanners and email.
- Have successful experience with DSA and be comfortable working within the DSA processes, maintaining communication with the project team including carbon copying (via email) the project team on important events and/or delivery of documentation required by DSA.
- Be comfortable problem solving during critical times of construction.
- Be mindful and tenacious about maintaining project budgets and schedules, especially during construction. Make decisions that support District goals and objectives, relative to scope creep and especially contractor-initiated change orders.
- Articulately communicate potential issues early and often. Provide thoughtful recommendations where applicable.

C. SUMMARY OF RESPONSIBILITIES OF CONSTRUCTION MANAGER

The selected construction management team shall provide full construction management services through the pre-construction phases of the relevant Project(s) that meet the

Project(s) budget and schedule, and to provide services through all subsequent phases. The construction management team shall carry out the responsibilities briefly delineated in the scope of services set forth below and on the form of Agreement. Such services shall be performed consistent with the highest standard of care for professionals performing similar scopes of services.

The construction management team shall, as a minimum, undertake the following responsibilities for the pre-construction phases and to provide services for subsequent phases, and any additional responsibilities reasonably necessary and customarily provided by an construction management services team conducting business in San Joaquin County:

1. Pre-Construction

- Collect and analyze data necessary to perform pre-construction services; meet as necessary with the District's Director of Operations, the District's Executive Director of Operations, and staff, neighborhood organizations, or upper-level District administrators for guidance.
- Participate in planned meetings.
- Participate in community meetings, such as, town hall, discussions, Board presentations, etc., as necessary.

3. Construction Administration and Close-out Phase

- Work closely with the District's Director of Operations and staff throughout the construction phase. Provide construction administration support through submittal review, response to contractor request for information, review the work for conformance to quality standards and assist with construction completion and acceptance.
- Review contractor-submitted change orders.
- Upload PDF drawings of as-built drawings as part of closeout.
- Review contractor submitted closeout documents.
- Assist the District with the preparation of all required agency and governmental close out documentation.
- Obtain, prepare, coordinate and submit documents as required for DSA review and final certification of projects.

4. Meetings

- Throughout each Project, a series of meetings in each phase of the Project shall be required and Construction Manager shall attend, take part in, and, when indicated, conduct such meetings. The number of meetings will be specific to each Project and delineated in the form of Agreement.

III. REQUIREMENTS FOR SUBMITTAL OF QUALIFICATIONS

A. FORMAT REQUIREMENTS

Firms submitting SOQs in response to this RFQ must follow the format below. Material must be in 8-1/2 x 11 inch format, font size 12 point or larger, not to exceed 50 pages. Each SOQ shall include a Front Cover stating the following: "Statement of Qualifications for [FIRM NAME] in Response to Lodi Unified School District's RFQ #2026-3."

Each SOQ shall include a table of contents and divider tabs labeled with the boldface headers below (e.g. the first tab would be entitled "Cover Letter," the second tab would be entitled "Business Information," etc.) Total submittal length shall not exceed 50 pages including resumes and samples of work.

Provide Three (5) bound copies and One (1) electronic copy of the Statement of Qualifications.

- The electronic copy will only be accepted via flash drive in the following programs: **Microsoft Office Suite or PDF.**

Each submission package will be reviewed to determine its completeness prior to the actual evaluation. If a respondent does not respond to all categories requested, the respondent may be disqualified from further consideration.

B. SOQ CONTENT REQUIREMENTS

1. TAB 1 - COVER LETTER (maximum of 1 page)

- Provide a letter of introduction signed by an authorized officer of the firm. If the construction management services firm is a joint venture, duplicate the signature block and have a principal or officer also sign on behalf of each party to the joint venture.
- Include a brief description of why your firm is well suited for, and can meet, the District's needs.
- Clearly identify the individual(s) who are authorized to speak for the firm during the evaluation process.
- Respondent must include one (1) of the follow statements:
"[INSERT RESPONDENT'S NAME] received a copy of the District's form of Independent Consultant Agreement for Professional Services ("Agreement") attached as Exhibit "A" to the RFQ. [INSERT RESPONDENT'S NAME] has reviewed the indemnity provisions and professional liability insurance provisions contained in the Agreement. If given the opportunity to contract with the District, [INSERT RESPONDENT'S NAME] has no objections to the use of the Agreement."

OR

"[INSERT RESPONDENT'S NAME] received a copy of the District's form of Independent Consultant Agreement for Professional Services ("Agreement") attached as Exhibit "A" to the RFQ. [INSERT RESPONDENT'S NAME] has reviewed the indemnity provisions and professional liability insurance provisions contained in the Agreement. If given the opportunity to contract with the District, [INSERT RESPONDENT'S NAME] has objections to the use of the Agreement, listed as follows: [IDENTIFY ALL OBJECTIONS]."

- Respondent shall certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract(s), nor that any such person will be employed in the performance of any/all contract(s) without immediate divulgence of this fact to the District.
- Respondent shall certify that no official or employee of the firm has ever been convicted of an ethics violation.

2. TAB 2 – BUSINESS INFORMATION

Please provide the following information:

- Company name.
- Address.
- Telephone.
- Website.
- Name and email of main contact.
- Federal Tax I.D. Number.
- Type of organization/business structure (ownership, legal form, i.e. corporation, partnership, etc., and senior officials of company). If a joint venture, describe the division of responsibilities between participating companies, offices (location) that would be the primary participants, and percentage interest of each firm.
- A brief description and history of the firm, including number of years the firm has been in business and date firm was established under its given name.
- Number of employees (licensed professionals, technical support.)
- Location of office where the bulk of services solicited will be performed.
- Any State of California certification for your firm of Small Business or Disabled Veteran Business Enterprise status.

3. TAB 3 – PROJECT APPROACH AND FIRM QUALIFICATIONS

- Provide a statement demonstrating your firm's or team's ability to accomplish the scope of services in a comprehensive and thorough manner with an aggressive schedule in order to meet the District's construction timeframe.
- A brief written summary of the firm's philosophy related to the management of K-12 Project(s).
- Describe the approach to compliance with Program requirements and conformance with Federal/State/Local applicable code requirements.
- Describe your firm's experience with construction cost reduction measures during pre-construction or construction.
- Describe your experience with pre-checked designs, giving specific project details.
- Describe your experience with lease/lease-back projects.
- How does your firm approach modernization projects versus new construction projects?
- Demonstrate your firm's flexibility in adapting to the changing needs and priorities of a K-12 school district.
- Describe your experience with DSA and working within the DSA processes.

- Identify established methods and approaches utilized by your firm to successfully meet completion deadlines, and provide examples demonstrating effective use of stated methods and approaches.

4. TAB 4 – RELEVANT K-12 PROJECT EXPERIENCE AND REFERENCES

- a. Provide information about prior construction management services provided by your firm within the last ten (10) years on **a minimum** of five (5) K-12 educational projects. Include **the last five** (5) K-12 educational projects your firm has designed that have been completed, including whether projects were closed out with DSA successfully.

For each project, include the following information:

- Briefly state the significance of each relevant project your firm has worked on that you would like to be considered in this RFQ. Briefly explain how you believe the particular project is relevant to the District's needs.
- Provide at least two (2) examples of projects that have been phased during school occupancy while conducting renovation and new construction.
- Provide a list of the following for each project noted above:
 - project name, type, program, and location
 - beginning and end dates of project (including design and construction)
 - square footage
 - date of each project Notice of Completion and DSA final certification
 - number of RFI's and Change Orders of each project
 - original budget, bid amount & final amount at close-out
 - key individuals of the firm involved and their roles in the project
 - References: district name with name of contact person, title, telephone number, and email address to be contacted for a reference

5. TAB 5 – CONSTRUCTION MANAGEMENT TEAM SUMMARY

The selected construction management company shall employ, at its expense, professionals properly skilled in the execution of the functions required for construction management services as described herein.

- Identify and provide resumes for key members within your construction management firm that you would assign to the team and their roles. Resumes shall include specific qualifications and recent related experience and shall include a list of references with contact names and phone numbers.
- The District expects that the team shall remain intact through the duration of the Project(s). If a team member must leave, the District reserves the right to approve that team member's replacement.

6. TAB 6 – LITIGATION HISTORY

Provide a comprehensive five (5)-year summary of the firm's litigation, arbitration and negotiated/settled history with previous clients. State the issues in the litigation, the status of the litigation, names of parties, and outcome. A SOQ failing to provide the requested information on lawsuits or litigation, and responses which assert attorney-client privilege and fail to provide the information requested, will be considered non-responsive, disqualified from the selection process, and will not be evaluated.

7. TAB 7 – PROPOSAL AND FEE SCHEDULE

The District requires each respondent to provide a proposal of services, including a fee proposal for the same, and a fee schedule identifying hourly rates by position. For the fee proposal, please identify the proposed fee for design services and fees for subsequent phases separately.

For the fee proposal, identify any proposed reimbursables by category (i.e. offices, computers and peripherals, printers, photocopy equipment, other as identified by proposing entity) and rate. Travel and related expenses shall be reimbursed in accordance with the federal government Joint Travel Regulation. All reimbursables will require receipts to be provided to the District.

IV. SELECTION CRITERIA

A. EVALUATION

The SOQ will be reviewed for responsiveness and evaluated pursuant to the specific criteria set forth in this RFQ, including, without limitation:

- The firm's experience and performance history with similar services for California K-12 school districts, including:
 - Successful experience with DSA modernization and new construction projects, and completion of projects on time, including demonstrated ability to complete Project(s) in a tight time-frame.
 - Experience in construction management of public school renovation and repair projects.
 - Experience administering construction change orders.
 - Knowledge of state laws and regulations, the American with Disabilities Act, and other governmental requirements for K-12 school districts.
 - Experience in data communication systems used in schools.

- Experience, results, professional and technical expertise of proposed personnel.
- Acceptable and verifiable references from clients contacted by the District, including:
 - Firm's reputation;
 - Satisfaction of previous clients (client relationships); and
 - Timeliness of work and ability of the firm to meet schedules;
- Overall responsiveness of the SOQ.
- Location of office and accessibility to the District.
- Proposal, including proposed fee and fee schedule.

A Selection Committee will evaluate all submissions. Each SOQ must be complete. Incomplete SOQs will be considered nonresponsive and grounds for disqualification. The District retains the sole discretion to determine issues of compliance and to determine whether respondents are responsive, responsible, and qualified. Based upon the information presented in the SOQs, the District's Selection Committee will choose the most highly qualified firms to be interviewed and then potentially selected. At the Selection Committee's discretion, firms may be requested to arrange a tour of a representative facility which they have been responsible for.

B. DISTRICT INVESTIGATIONS

The District may perform investigations of responding parties that extend beyond contacting the references identified in the SOQ. The District may request a firm to submit additional information pertinent to the review process. The District also reserves the right to investigate and rely upon information from other available sources in addition to any documents or information submitted.

WE THANK YOU FOR YOUR INTEREST IN THIS EXCITING PROJECT!

INDEPENDENT CONSULTANT MASTER AGREEMENT FOR PROFESSIONAL SERVICES

This Independent Consultant Master Agreement for Professional Services ("Agreement") is made and entered into as of the _____ day of _____, 202__, by and between the Lodi Unified School District ("District") and _____ ("Consultant") (together, "Parties").

NOW, THEREFORE, the Parties agree as follows:

1. **Services.** Consultant shall provide _____ services ("Services") as further described in the Task Order for each engagement ("Task Order"), a form of which is attached hereto as **Exhibit "A"**.
2. **Term.** Consultant shall commence providing Services under the terms of this Agreement on the dates specified in each applicable Task Order and will diligently perform as required and complete performance by the date set forth in the Task Order, unless this Agreement or the Task Order is terminated and/or otherwise cancelled prior to that time.
3. **Submittal of Documents.** Consultant shall not commence the Services under this Agreement or the Task Order until Consultant has submitted and District has approved the documents, certificates, and endorsements of insurance required as indicated below:

<u> X </u>	Signed Agreement
<u> X </u>	Signed Task Order
<u> X </u>	Workers' Compensation Certification
<u> X </u>	Fingerprinting/Criminal Background Investigation Certification
<u> X </u>	Insurance Certificates and Endorsements
<u> X </u>	W-9 Form
_____	Other: _____

4. **Compensation.** District agrees to pay Consultant for Services satisfactorily rendered pursuant to this Agreement and the Task Order a total fee not to exceed the amount set forth in the applicable Task Order. District shall pay Consultant according to the following terms and conditions:
 - 4.1. Payment for the Services shall be made for all undisputed amounts based upon the delivery of the work product as determined by District. Payment shall be made within thirty (30) days after Consultant submits an invoice to District for Services actually completed and after District's written approval of the Services, or the portion of the Services for which payment is to be made. The schedule of deliverable Services to be produced shall be set forth in the applicable Task Order.
 - 4.2. The Services shall be performed at the hourly billing rates and/or unit prices included in the Task Order. If hourly billing applies, the itemized invoice shall

reflect the hours spent by Consultant in performing its Services pursuant to this Agreement and the Task Order.

- 4.3. If Consultant works at more than one site, Consultant shall invoice for each site separately.
5. **Expenses.** District shall not be liable to Consultant for any costs or expenses paid or incurred by Consultant in performing Services for District.
6. **Independent Contractor.** Consultant, in the performance of the Services, shall be and act as an independent contractor. Consultant understands and agrees that it and all of its 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 to employees of District and/or to which District's employees are normally entitled, including, but not limited to, State Unemployment Compensation or Workers' Compensation. Consultant 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 Consultant's employees. In the performance of the work herein contemplated, Consultant is an independent contractor or business entity, with the sole authority for controlling and directing the performance of the details of the work, District being interested only in the results obtained.
7. **Materials.** Consultant shall furnish, at its own expense, all labor, materials, equipment, supplies and other items necessary to complete the Services to be provided pursuant to this Agreement and the applicable Task Order.
8. **Performance of Services.**
 - 8.1. **Standard of Care.** Consultant represents that Consultant has the qualifications and ability to perform the Services in a professional manner, without the advice, control or supervision of District. Consultant's Services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of its profession for services to California school districts.

Consultant shall carefully study and compare all documents, findings, and other instructions and shall at once report to District, in writing, any error, inconsistency, or omission that Consultant or its employees may discover. Consultant shall have responsibility for discovery of errors, inconsistencies, or omissions.
 - 8.2. **Meetings.** Consultant and District agree to participate in regular meetings as set forth in the applicable Task Order.
 - 8.3. **District Approval.** The work completed herein must meet the approval of District and shall be subject to District's general right of inspection and supervision to secure the satisfactory completion thereof.

- 8.4. **New Task Order Approval.** Consultant and District recognize that Consultant's Services may include working on various projects for District. Consultant shall obtain the approval of District prior to the commencement of a new project by submitting a proposal for such new scope and obtaining written authorization via a new Task Order for each additional project.
9. **Originality of Services.** Except as to standard generic details, Consultant 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 Consultant and shall not be copied in whole or in part from any other source, except that submitted to Consultant by District as a basis for such Services.
10. **Copyright/Trademark/Patent.** Consultant understands and agrees that, to the extent proper payment has timely been made to Consultant, all matters produced under this Agreement and applicable Task Orders 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 the District. Consultant agrees to take such actions as are necessary to protect the rights assigned to the District in this Agreement, and to refrain from taking any action that would impair those rights. Documents and data produced by Consultant are not intended or represented by Consultant to be suitable for use or reliance beyond the scope or purpose for which they were originally prepared, or for anyone except the District. Any such unauthorized use will be at the District's or third party's sole risk.
11. **Audit.** Consultant shall establish and maintain books, records, and systems of account, in accordance with generally accepted accounting principles, reflecting all business operations of Consultant transacted under this Agreement and each related Task Order. Consultant shall retain these books, records, and systems of account during the Term of this Agreement and for five (5) years thereafter. Consultant 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 Consultant and shall conduct audit(s) during Consultant's normal business hours, unless Consultant otherwise consents.
12. **Disputes.** In the event of a dispute between the parties as to performance of the Services, the interpretation of this Agreement and each Task Order, or payment or nonpayment for work performed or not performed, the parties shall attempt to resolve the dispute in good faith. Pending resolution of the dispute, Consultant agrees it will neither rescind the Agreement or related Task Order nor stop the performance of the Services, but will allow determination by the court of the State of California, in the county in which District's administration office is located, having

competent jurisdiction of the dispute. Disputes may be determined by mediation if mutually agreeable, otherwise by litigation. Notice of the demand for mediation of a dispute shall be filed in writing with the other party to the Agreement and the applicable Task Order. The demand for mediation shall be made within a reasonable time after written notice of the dispute has been provided to the other party, but in no case longer than ninety (90) days after initial written notice. If a claim, or any portion thereof, remains in dispute upon satisfaction of all applicable dispute resolution requirements, Consultant shall comply with all claims presentation requirements as provided in Chapter 1 (commencing with section 900) and Chapter 2 (commencing with section 910) of Part 3 of Division 3.6 of Title 1 of Government Code as a condition precedent to Consultant's right to bring a civil action against District. For purposes of those provisions, the running of the time within which a claim must be presented to District shall be tolled from the time Consultant submits its written claim until the time the claim is denied, including any time utilized by any applicable meet and confer process.

13. Termination.

13.1. For Convenience by District. District may, at any time, with or without reason, terminate this Agreement or a related Task Order and compensate Consultant only for Services satisfactorily rendered to the date of termination. Written notice by District shall be sufficient to stop further performance of Services by Consultant. Notice shall be deemed given when received by Consultant or no later than three (3) calendar days after the day of mailing, whichever is sooner.

13.2. With Cause by District. District may terminate this Agreement or a related Task Order upon giving of written notice of intention to terminate for cause. Cause shall include:

13.2.1. material violation of this Agreement or Task Order by Consultant; or

13.2.2. any act by Consultant exposing District to liability to others for personal injury or property damage.

Written notice by District shall contain the reasons for such intention to terminate and unless within three (3) calendar days after that notice the condition or violation shall cease, or satisfactory arrangements for the correction thereof be made, this Agreement or related task order shall upon the expiration of the three (3) calendar days cease and terminate. In the event of this termination, District may secure the required services from another Consultant. If the expense, fees, and/or costs to District exceed the cost of providing the services pursuant to this Agreement or Task Order, Consultant shall immediately pay the excess expense, fees, and/or costs to District upon the receipt of District's notice of these expense, fees, and/or costs. The foregoing provisions are in addition to and not a limitation of any other rights or remedies available to District.

14. Indemnification. To the furthest extent permitted by California law, Consultant shall indemnify and hold harmless District, its Governing Board, agents, representatives,

officers, consultants, employees, and trustees, (the "Indemnified Parties") from any and all claims, to the extent arising out of, pertaining to, or relating to the negligence, recklessness, or willful misconduct of Consultant. Consultant shall, to the furthest extent permitted by California law, defend the Indemnified Parties at Consultant's own expense, including reasonable attorneys' fees and costs, from any and all claims, to the extent arising out of, pertaining to, or relating to the negligence, recklessness, or willful misconduct of Consultant. District shall have the right to accept or reject any legal representation that Consultant proposes to defend the indemnified parties.

15. Insurance.

15.1. Consultant shall procure and maintain at all times it performs any portion of the Services the following insurance with limits equal to the amount indicated below.

Type of Coverage	Minimum Requirement
Commercial General Liability Insurance , including Bodily Injury, Personal Injury, Property Damage, Advertising Injury, and Medical Payments Each Occurrence General Aggregate	 \$ 2,000,000 \$ 4,000,000
Automobile Liability Insurance - Any Auto Each Occurrence General Aggregate	 \$ 1,000,000 \$ 3,000,000
Professional Liability	\$ 2,000,000
Workers' Compensation	Statutory Limits
Employer's Liability	\$ 4,000,000

15.1.1. Commercial General Liability and Automobile Liability

Insurance. Commercial General Liability Insurance and Any Auto Automobile Liability Insurance that shall protect Consultant, 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, or forms substantially similar, if approved by District.)

15.1.2. Workers' Compensation and Employer's Liability Insurance.

Workers' Compensation Insurance and Employer's 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, Consultant 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.

- 15.1.3. **Professional Liability (Errors and Omissions).** Professional Liability Insurance as appropriate to Consultant's profession, coverage to continue through completion of construction plus two (2) years thereafter.
- 15.2. **Proof of Insurance.** Consultant shall not commence performing any portion of the Services until all required insurance has been obtained and certificates indicating the required coverage have been delivered in duplicate to District and approved by District. Certificates and insurance policies shall include the following:
- 15.2.1. 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."
- 15.2.2. 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.
- 15.2.3. An endorsement stating that District and its Governing Board, agents, representatives, employees, trustees, officers, and consultants, are named additional insured to the extent of the liabilities assumed by Consultant under this Agreement under all policies except Workers' Compensation Insurance, Professional Liability, and Employer's Liability Insurance. An endorsement shall also state that Consultant's insurance policies shall be primary to any insurance or self-insurance maintained by District. An endorsement shall also state that there shall be a waiver of any subrogation.
- 15.2.4. All policies except the Professional Liability, Workers' Compensation, and Employer's Liability Insurance Policies shall be written on an occurrence form.
- 15.3. **Acceptability of Insurers.** Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: VII, unless otherwise acceptable to District.
16. **Assignment.** The obligations of Consultant pursuant to this Agreement or a related Task Order shall not be assigned by Consultant.
17. **Compliance with Laws.** Consultant 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. Consultant shall give all notices required by any law, ordinance, rule and regulation bearing on conduct of the Services as indicated or specified. If Consultant observes that any of the Services required by this Agreement or a related Task Order are at variance with any such laws, ordinance, rules or regulations, Consultant 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 and/or the appropriate Task Order shall be appropriately amended in writing, or this Agreement and/or the appropriate Task Order shall be terminated effective upon Consultant's receipt of a written termination notice from District.

17.1. **LABOR CODE REQUIREMENTS:** Consultant shall comply with all applicable provisions of the California Labor Code, Division 3, Part 7, Chapter 1, Articles 1 – 5, including, without limitation, the payment of the general prevailing per diem wage rates for public work projects of more than one thousand dollars (\$1,000). Copies of the prevailing rate of per diem wages are on file with District.

17.1.1. **Registration:** If applicable, before a public works contract can be awarded, Consultant and its subcontractor(s) shall be registered with the Department of Industrial Relations in accordance with Labor Code section 1771.1.

17.1.2. **Certified Payroll Records:** Consultant and its subcontractor(s) shall keep accurate certified payroll records of workers and shall electronically submit certified payroll records directly to the Department of Industrial Relations weekly or within ten (10) days of any request by District or the Department of Industrial Relations.

17.1.3. **Labor Compliance:** Consultant shall perform the Services of the Project while complying with all the applicable regulations, including section 16000, et seq., of Title 8 of the California Code of Regulations and is subject to labor compliance monitoring and enforcement by the Department of Industrial Relations.

18. **Certificates/Permits/Licenses/Registration.** Consultant and all Consultant's employees or agents shall secure and maintain in force such certificates, permits, licenses and registration as are required by law in connection with the furnishing of Services pursuant to this Agreement and related Task Order.

19. **Employment with Public Agency.** Consultant, if an employee of another public agency, agrees that Consultant will not receive salary or remuneration, other than vacation pay, as an employee of another public agency for the actual time in which services are actually being performed pursuant to this Agreement and related Task Order.

20. **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, color, ancestry, national origin, religious creed, physical disability, medical condition, marital status, sexual orientation, gender, or age and therefore Consultant agrees to comply with applicable federal and California laws including, but not limited to the California Fair Employment and Housing Act beginning with Government Code Section 12900 and Labor Code section 1735 and District policy. In addition, Consultant agrees to require like compliance by all of its subcontractor(s).

21. **Fingerprinting of Employees.** The Fingerprinting/Criminal Background Investigation Certification must be completed and attached to this Agreement or the appropriate Task Order prior to Consultant's performing of any portion of the Services.
22. **Disabled Veteran Business Enterprises.** Section 17076.11 of the Education Code requires school districts using funds allocated pursuant to the State of California School Facility Program for the construction or modernization of a school building to have a participation goal of at least three percent (3%), per year, of the overall dollar amount expended each year by the school district, for disabled veteran business enterprises ("DVBE"). In accordance therewith, Consultant must submit, upon request by District, appropriate documentation to District identifying the steps Consultant has taken to solicit DVBE participation in conjunction with this Agreement or the appropriate Task Order, if applicable.
23. **No Rights in Third Parties.** This Agreement and related Task Order does not create any rights in, or inure to the benefit of, any third party except as expressly provided herein.
24. **District's Evaluation of Consultant and Consultant's Employees and/or Subcontractors.** District may evaluate Consultant in any way District is entitled pursuant to applicable law. District's evaluation may include, without limitation:
- 24.1. Requesting that District employee(s) evaluate Consultant and Consultant's employees and subcontractors and each of their performance.
- 24.2. Announced and unannounced observance of Consultant, Consultant's employee(s), and/or subcontractor(s).
25. **Limitation of Liability.** Other than as provided in this Agreement, District's financial obligations under this Agreement and related Task Order shall be limited to the payment of the compensation provided in this Agreement and the Task Order. Consultant's total liability for all claims or causes of action of any kind shall not exceed the amounts recoverable from the insurance limits set forth in this Agreement. Notwithstanding any other provision of this Agreement or the applicable Task Order, in no event, shall District or Consultant 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 or Task Order for the Services performed in connection with this Agreement and related Task Order.
26. **Confidentiality.** Consultant and all Consultant's agents, personnel, employee(s), and/or subcontractor(s) shall maintain the confidentiality of all information received in the course of performing the Services. Consultant understands that student records are confidential and agrees to comply with all state and federal laws concerning the maintenance and disclosure of student records. This requirement to maintain confidentiality shall extend beyond the termination of this Agreement or Task Order.
27. **Notice.** Any notice required or permitted to be given under this Agreement or

Task Order shall be deemed to have been given, served, and received if given in writing and either personally delivered or deposited in the United States mail, registered or certified mail, postage prepaid, return receipt required, or sent by overnight delivery service, or facsimile transmission, addressed as follows:

District:

Lodi Unified school District
1305 E Vine Street
Lodi, California 95240
FAX: 209-331-7223
ATTN:

Consultant

XXXXXXXXXXXXXXXXXXXX

Any notice personally given or sent by facsimile transmission shall be effective upon receipt. Any notice sent by overnight delivery service shall be effective the business day next following delivery thereof to the overnight delivery service. Any notice given by mail shall be effective three (3) calendar days after deposit in the United States mail.

28. **Integration/Entire Agreement of Parties.** This Agreement and the related Task Order constitute the entire agreement between the Parties and supersedes all prior discussions, negotiations, and agreements, whether oral or written. This Agreement may be amended or modified only by a written instrument executed by both Parties, such as a Task Order.

29. **California Law.** This Agreement and related Task Order shall be governed by and the rights, duties and obligations of the Parties shall be determined and enforced in accordance with the laws of the State of California. The Parties further agree that any action or proceeding brought to enforce the terms and conditions of this Agreement and Task Order shall be maintained in the county in which District's administrative offices are located.

30. **Waiver.** The waiver by either party of any breach of any term, covenant, or condition herein contained shall not be deemed to be a waiver of such term, covenant, condition, or any subsequent breach of the same or any other term, covenant, or condition herein contained.

31. **Severability.** If any term, condition or provision of this Agreement or Task Order is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions will nevertheless continue in full force and effect, and shall not be affected, impaired or invalidated in any way.

32. **Provisions Required By Law Deemed Inserted.** Each and every provision of law and clause required by law to be inserted in this Agreement or related Task Order shall be deemed to be inserted herein and this Agreement and related Task Order shall be read and enforced as though it were included therein.

33. **Authority to Bind Parties.** Neither party in the performance of any and all duties

under this Agreement or Task Order, except as otherwise provided in this Agreement or related Task Order, has any authority to bind the other to any agreements or undertakings.

34. **Attorney's Fees/Costs.** Should litigation be necessary to enforce any terms or provisions of this Agreement or Task Order, then each party shall bear its own litigation and collection expenses, witness fees, court costs and attorney's fees.
35. **Tolling of District's Claims.** Consultant agrees to toll all statutes of limitations for District's assertion of claims against Consultant that arise out of, pertain to, or relate to contractors' or subcontractors' claims against District involving Consultant's services under this Agreement or a Task Order, until the contractors' or subcontractors' claims are finally resolved.
36. **Captions and Interpretations.** Paragraph headings in this Agreement and related Task Order are used solely for convenience, and shall be wholly disregarded in the construction of this Agreement and Task Order. No provision of this Agreement or a related Task Order shall be interpreted for or against a party because that party or its legal representative drafted such provision, and this Agreement and Task Order shall be construed as if jointly prepared by the Parties.
37. **Calculation of Time.** For the purposes of this Agreement and related Task Order, "days" refers to calendar days unless otherwise specified.
38. **Signature Authority.** Each party has the full power and authority to enter into and perform this Agreement and the related Task Order, and the person signing this Agreement and the related Task Order on behalf of each Party has been properly authority and empowered to enter into this Agreement and Task Order.
39. **Counterparts.** This Agreement and all Task Orders, amendments and supplements to it may be executed in counterparts, and all counterparts together shall be construed as one document.

Incorporation of Recitals and Exhibits. The Recitals and each exhibit attached hereto are hereby incorporated herein by reference.

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement on the date indicated below.

Dated: _____, 202__ Dated: _____, 202__

Lodi Unified School District

By: _____

By: _____

Information regarding Consultant:

License No.: _____

Registration No.: _____

Address: _____

Telephone: _____

Facsimile: _____

E-Mail: _____

Type of Business Entity:

_____ Individual

_____ Sole Proprietorship

_____ Partnership

_____ Limited Partnership

_____ Corporation, State: _____

_____ Limited Liability Company

Other: _____

Employer Identification and/or Social
Security Number

NOTE: Section 6041 of the Internal Revenue Code (26 U.S.C. 6041) and Section 1.6041-1 of Title 26 of the Code of Federal Regulations (26 C.F.R. 1.6041-1) requires the recipients of \$600.00 or more to furnish their taxpayer information to the payer. In order to comply with these requirements, District requires Consultant to furnish the information requested in this section.

EXHIBIT "A" FORM OF TASK ORDER

TASK ORDER FOR INDEPENDENT CONSULTANT MASTER AGREEMENT FOR SPECIAL SERVICES (TASK ORDER NO. _____)

This Task Order ("**Task Order**") is entered into by and between the LODI UNIFIED SCHOOL DISTRICT ("**District**") and [____] ("**Consultant**;" together "**Parties**") relating to the Parties agreement and approval of this Task Order under the Independent Consultant Master Agreement for Special Services ("**Agreement**"), which was entered into on [____], 2023.

RECITALS

WHEREAS, in order to complete the intended scope of work under the Agreement, the Parties agree upon and enter into Task Order forms based on Consultant's proposal for the work;

WHEREAS, the Parties desire to enter into this Task Order based on a proposal for services from the Consultant; and

WHEREAS, the Parties agree that the Consultant shall provide the proposed services for a not to exceed amount of [____] Dollars (\$____.00).

TASK ORDER **TERMS**

NOW, THEREFORE, in consideration of the mutual promises and covenants set forth in the Agreement and this Task Order, the Parties agree to the following:

1. The Parties approve the scope of services attached to this Task Order and the terms of the accompanying proposal to the extent that the proposal does not conflict with the Agreement or this Task Order, and the Consultant agrees to countersign the Task Order.
2. The Parties agree that the scope of services set forth in this Task Order shall be completed for the not-to-exceed cost of [____] Dollars (\$____.00).
3. All provisions of the Agreement, as amended, remains in full force and effect, and the Parties acknowledge that the terms and conditions of the Agreement, as amended, shall remain binding upon them.

IN WITNESS WHEREOF, the Parties have accepted and agreed to the terms of this Task Order on the dates indicated below.

DISTRICT:

Dated: _____, 202__
LODI UNIFIED SCHOOL DISTRICT

Signed By: _____
Print Name: _____
Print Title: _____

CONSULTANT:

Dated: _____, 202__

Signed By: _____
Print Name: _____
Print Title: _____

ATTACHMENT NO. 1 TO TASK ORDER

Consultant's entire Proposal is **not** made part of this Task Order.

NOTE: IF A CONSULTANT PROVIDES AN ACCEPTABLE DESCRIPTION OF SERVICES AS PART OF A PROPOSAL, THAT DESCRIPTION OF SERVICES CAN BE ATTACHED WITHOUT ANY TERMS, CONDITIONS, LIMITATIONS, ETC., FROM THAT PROPOSAL.

Consultant shall provide all _____ services that the District, or its Board, officers, employees, representatives, or agents may request for each property listed below ("Property"). Consultant shall coordinate its Services with the District's representative, or his/her designee. Consultant shall also coordinate its Services with the District's other consultants.

School Site	Property Address	Project Description

The Services to be provided by Consultant include, but are not limited to, the following:

WORKERS' COMPENSATION CERTIFICATION

Labor Code Section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

- By being insured against liability to pay compensation by one or more insurers duly authorized to write compensation insurance in this State.
- By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing satisfactory proof to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to its employees.

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 Services of this Agreement.

Date: _____

Name of Consultant: _____

Signature: _____

Print Name and Title: _____

(In accordance with Article 5 – commencing at Section 1860, Chapter 1, part 7, Division 2 of the Labor Code, the above certificate must be signed and filed with District prior to performing any Services under this Agreement.)

**FINGERPRINTING/CRIMINAL BACKGROUND INVESTIGATION
CERTIFICATION**

One of the three boxes below **must** be checked, with the corresponding certification provided, and this form attached to the Independent Consultant Master Agreement for Professional Services ("Agreement"):

- ☐ Consultant's employees will have only limited contact, if any, with District pupils and District will take appropriate steps to protect the safety of any pupils that may come in contact with Consultant's employees so that the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 shall not apply to Consultant for the services under this Agreement. As an authorized District official, I am familiar with the facts herein certified, and am authorized to execute this certificate on behalf of District. (Education Code § 45125.1 (c))

Date: _____

District Representative's Name and Title: _____

District Representative's Signature: _____

- ☐ The fingerprinting and criminal background investigation requirements of Education Code section 45125.1 apply to Consultant's services under this Agreement and Consultant certifies its compliance with these provisions as follows: *"Consultant certifies that Consultant has complied with the fingerprinting and criminal background investigation requirements of Education Code section 45125.1 with respect to all Consultant's employees, subcontractors, agents, and subcontractors' employees or agents ("Employees") regardless of whether those Employees are paid or unpaid, concurrently employed by District, or acting as independent contractors of Consultant, who may have contact with District pupils in the course of providing services pursuant to the Agreement, and the California Department of Justice has determined that none of those Employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. A complete and accurate list of all Employees who may come in contact with District pupils during the course and scope of the Agreement is attached hereto."*

- ☐ Consultant's services under this Agreement shall be limited to the construction, reconstruction, rehabilitation, or repair of a school facility and although all Employees will have contact, other than limited contact, with District pupils, pursuant to Education Code section 45125.2 District shall ensure the safety of the pupils by at least one of the following as marked:

- ☐ The installation of a physical barrier at the worksite to limit contact with pupils.
- ☐ Continual supervision and monitoring of all Consultant's on-site employees of Consultant by an employee of Consultant, _____, whom the Department of Justice has ascertained has not been convicted of a violent or serious felony.
- ☐ Surveillance of Employees by District personnel.

Date: _____

District Representative's Name and Title: _____

District Representative's Signature: _____

I am a representative of Consultant entering into this Agreement with District and I am familiar with the facts herein certified, and am authorized and qualified to execute this certificate on behalf of Consultant.

Date: _____

Name of Consultant: _____

Signature: _____

Print Name and Title: _____