



AIMS K-12 College Prep Charter District

2018-4-17 Board Meeting

Date and Time

Tuesday April 17, 2018 at 6:30 PM PDT

Location

171 12th St. Oakland CA 94607

AIMS does not discriminate on the basis of disability in the admission or access to, or treatment or employment in, its programs or activities. Marisol Magana has been designated to receive requests for disability-related modifications or accommodations in order to enable individuals with disabilities to participate in open and public meetings at AIMS. Please notify Marisol Magana at (510) 220-9985 at least 24 hours in advance of any disability accommodations being needed in order to participate in the meeting.

Agenda

	Purpose	Presenter	Time
I. Opening Items			6:30 PM
Opening Items			
A. Call the Meeting to Order			1 m
- Board President, Mr. Steven Leung			
B. Record Attendance and Guests	Vote		2 m
- Roll Call for the directors of the board, and opportunity for introduction of any guest presenters			

	Purpose	Presenter	Time
C. Adoption of Agenda	Vote		2 m
- Board President, Mr. Steven Leung			
D. Public Comment on Non-Agenda Items			10 m
Public Comment on Non-Agenda Items is set aside for members of the Public to address the items not on the Board’s agenda. The Board of Directors will not respond or take action in response to Public Comment, except that the board may ask clarifying questions or direct staff. <u>Comments are limited to two (2) minutes per person, and a total time allotted for all public comment will not exceed thirty (30) minutes (10 minutes per section).</u>			
E. Public Comment on Agenda Items			10 m
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II. Non-Action Items			6:55 PM
A. President's Report	FYI		5 m
- Board President, Mr. Steven Leung			
B. Superintendent's Report	FYI		5 m
- Superintendent Woods-Cadiz			
C. AIMS K-12 Report	FYI		5 m
- Head of School - Mr. Tareyton Russ			
- Division Heads - Mr. Peter Holmquist, Mr. Maurice Williams, Mr. Christopher Ahmad, & Ms. Erin Oh			
D. Human Resources Report	FYI		5 m
- Director of Human Resources			

	Purpose	Presenter	Time
E. Operations Report	FYI		5 m
<ul style="list-style-type: none"> - Data, Accountability, and Operations Director, Ms. Marisol Magana - Data, Accountability, and Operations Manager, Ms. Tiffany Tung 			
F. Finance Report	FYI		5 m
<ul style="list-style-type: none"> - CSMC School Business Manager, Ms. Adrienne Barnes 			
G. ELD Coordinator Report	FYI		5 m
<ul style="list-style-type: none"> - ELD Coordinator, Ms. Vannee Chand 			
H. College Bound Kids Report	FYI		5 m
<ul style="list-style-type: none"> - CBK Coordinator, Mr. Matthew Gordan 			
III. Action Items			7:35 PM
A. Consent Calendar	Vote		5 m
<ol style="list-style-type: none"> 1. Personnel Report <ul style="list-style-type: none"> - Director of Human Resources 2. Approval Board Meeting Minutes for 3/20/2018 <ul style="list-style-type: none"> - Secretary to the Board of Directors 3. Approval of Fagen Friedman & Fulfrost March Invoice <ul style="list-style-type: none"> - CBO, Ms. Susan Schickman 4. Approval of YM&C March Invoice <ul style="list-style-type: none"> - CBO, Ms. Susan Schickman 5. Approval of VTD Invoice <ul style="list-style-type: none"> - CBO, Ms. Susan Schickman 6. Approval of Nob Hill Catering March Invoice <ul style="list-style-type: none"> - CBO, Ms. Susan Schickman 7. Approval of OUSD Facilities Use Fee <ul style="list-style-type: none"> - CBO, Ms. Susan Schickman 8. Approval of OUSD Second Utilities Invoice <ul style="list-style-type: none"> - CBO, Ms. Susan Schickman 			
B. Discussion and Possible Action Regarding	Vote		5 m
Decision to Partner with BoardOnTrack for Board Data and Project Management <ul style="list-style-type: none"> - Superintendent Woods-Cadiz 			

	Purpose	Presenter	Time
C. Discussion and Possible Action Regarding Review and Selection of Insurance Broker RFP - Treasurer of the Board, Director Chris Edington	Vote		5 m
D. Discussion and Possible Action Regarding Approval to Renew AIMS Service Agreement with Carrier for 2018 - CBO Ms. Susan Scickman	Vote		5 m
E. Discussion and Possible Action Regarding Approval of School food Solutions Contract - Data, Accountability, and Operations Manager, Ms. Tiffany Tung	Vote		5 m
IV. Closed Session			8:00 PM
A. Public Comment on Closed Session Items Public Comment on closed session items is set aside for members of the Public to address items on the Board’s agenda for closed session. The Board of Directors will not respond or take action in response to Public Comment, except that the board may ask clarifying questions or direct staff. <u>Comments are limited to two (2) minutes per person, and a total time allotted for all public comment will not exceed thirty (30) minutes (10 minutes per section).</u>	FYI		10 m
B. Recess to Closed Session Student Disciplinary Hearing (§ 48918.5 (C)) Conference with Real Property Negotiations (§ 54956.8) Conference with Legal Counsel – Existing Litigation: 1 Case (§ 54956.9) Conference with Legal Counsel – Anticipated Litigation: 2 Cases (§ 54956.9(b))	Discuss		60 m
C. Reconvene from Closed Session Roll Call	Vote		2 m
D. Report from Closed Session - Board President, Mr. Steven Leung	FYI		3 m
V. Closing Items			9:15 PM
A. Items for Next Agenda	Discuss		5 m

	Purpose	Presenter	Time
-			
-			
-			
-			
B. Adjourn Meeting	FYI		

Coversheet

Adoption of Agenda

Section: I. Opening Items
Item: C. Adoption of Agenda
Purpose: Vote
Submitted by:
Related Material: 2018-4-17 Board Meeting Agenda.pdf

American Indian Model Schools
BOARD MEETING AGENDA
Tuesday April 17, 2018 @ 6:30 pm
171 12th Street
Oakland, CA 94607



I. CALL TO ORDER:

II. ROLL CALL:

III. ADOPTION OF AGENDA

IV. PUBLIC COMMENT ON NON-AGENDA ITEMS

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V. NON-ACTION ITEMS

1. President's Report

- Board President, Mr. Steven Leung

2. 700 Forms Filing for AIMS Board Members

- Board Secretary, Director Cook

3. Spring Board Retreat to be Held at 12th Street Site

- Board President, Mr. Steven Leung

4. Superintendent's Report

- Superintendent Woods-Cadiz

5. AIMS k-12 Report

- Head of School, Mr. Russ, & Division Heads, Mr. Maurice Williams, Mr. Peter Holmquist, Mr. Christopher Ahmad, & Ms. Erin Oh

6. Operations Report

- Data, Accountability, and Operations Director, Ms. Marisol Magana
- Data, Accountability, and Operations Manager, Ms. Tiffany Tung

7. Finance Report

- Chief Business Officer, Ms. Susan Schickman & CSMC EVP, Tom Nichols

8. Human Resources Report

- Director of Human Resources, Mr. Rob Mayfield

9. ELD Coordinator Report

- ELD Coordinator, Ms. Vannee Chand

10. College Bound Kids Report

- CBK Coordinator, Mr. Matthew Gordan

VI. PUBLIC COMMENT ON AGENDA ITEMS

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VII. DISCUSSION/ACTION ITEMS

1. Consent Calendar

- i. Personnel Report
 - Director of Human Resources, Mr. Rob Mayfield
 - ii. Approval of 3/20/2018 Board Meeting Minutes Draft
 - Secretary to the Board of Directors, Mr. Joe Schickman
 - iii. Fagen Friedman & Fulfroft February Invoice
 - CBO, Ms. Susan Schickman
 - iv. YM&C March Invoice
 - CBO, Ms. Susan Schickman
 - v. VTD Final 2017 Audit Invoice
 - CBO, Ms. Susan Schickman
 - vi. Nob Hill Catering March Invoice
 - CBO, Ms. Susan Schickman
 - vii. OUSD Facilities Use Fee for 2017/2018
 - CBO, Ms. Susan Schickman
 - viii. OUSD Second Utilities Fee
 - CBO, Ms. Susan Schickman
2. Discussion and Possible Action Regarding **Decision to Partner with BoardOnTrack for Board Data and Project Management**
 - Superintendent Woods-Cadiz
 3. Discussion and Possible Action Regarding **Review and Selection of Insurance Broker RFP**
 - Treasurer of the AIMS Board, Director Chris Edington
 4. Discussion and Possible Action Regarding **Approval to Renew AIMS Service Agreement with Carrier for 2018**
 - Chief Business Officer, Ms. Susan Schickman
 5. Discussion and Possible Action Regarding **Approval of School Food Solutions Contract**
 - Data, Accountability, and Operations Manager, Ms. Tiffany Tung

VIII. PUBLIC COMMENT ON CLOSED SESSION ITEMS

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IX. RECESS TO CLOSED SESSION

Student Disciplinary Hearing (§ 48918.5 (C))

Conference with Real Property Negotiations (§ 54956.8)

Conference with Legal Counsel – Existing Litigation: 1 Case (§ 54956.9)

Conference with Legal Counsel – Anticipated Litigation: 2 Cases (§ 54956.9(b))

X. RECONVENE FROM CLOSED SESSION:

XI. ROLL CALL

XII. REPORT FROM CLOSED SESSION

XIII. ITEMS FOR NEXT AGENDA

- Visiplex PA System & Facilities Upgrades

XIV. ADJOURNMENT:

NOTICES

The next regular meeting of the Board of Directors is scheduled to be held in May 15th, 2018 @ 6:30 pm. AIMS does not discriminate on the basis of disability in the admission or access to, or treatment or employment in, its programs or activities. Marisol Magana has been designated to receive requests for disability-related modifications or accommodations in order to enable individuals with disabilities to participate in open and public meetings at AIMS. Please notify Marisol Magana at (510)220-9985 at least 24 hours in advance of any disability accommodations being needed in order to participate in the meeting.

I, _____ hereby certify that I posted this agenda at the AIMS Campus 171 12th street, Oakland, CA 94607 on, _____, at _____ PM Certification of Posting

Coversheet

Public Comment on Non-Agenda Items

Section: I. Opening Items
Item: D. Public Comment on Non-Agenda Items
Purpose: FYI
Submitted by:
Related Material: Public_Comment_Speaker_Cards.pdf

Public Comment Speaker Cards

Name: _____ Date: _____

I am a: Parent _____ Student _____ Staff _____ Grade _____

Other (please specify) _____

Agenda Item (if applicable) _____

Comment: _____

Public Comment Speaker Cards

Name: _____ Date: _____

I am a: Parent _____ Student _____ Staff _____ Grade _____

Other (please specify) _____

Agenda Item (if applicable) _____

Comment: _____

Coversheet

Public Comment on Agenda Items

Section: I. Opening Items
Item: E. Public Comment on Agenda Items
Purpose: FYI
Submitted by:
Related Material: Public_Comment_Speaker_Cards.pdf

Public Comment Speaker Cards

Name: _____ Date: _____

I am a: Parent _____ Student _____ Staff _____ Grade _____

Other (please specify) _____

Agenda Item (if applicable) _____

Comment: _____

Public Comment Speaker Cards

Name: _____ Date: _____

I am a: Parent _____ Student _____ Staff _____ Grade _____

Other (please specify) _____

Agenda Item (if applicable) _____

Comment: _____

Coversheet

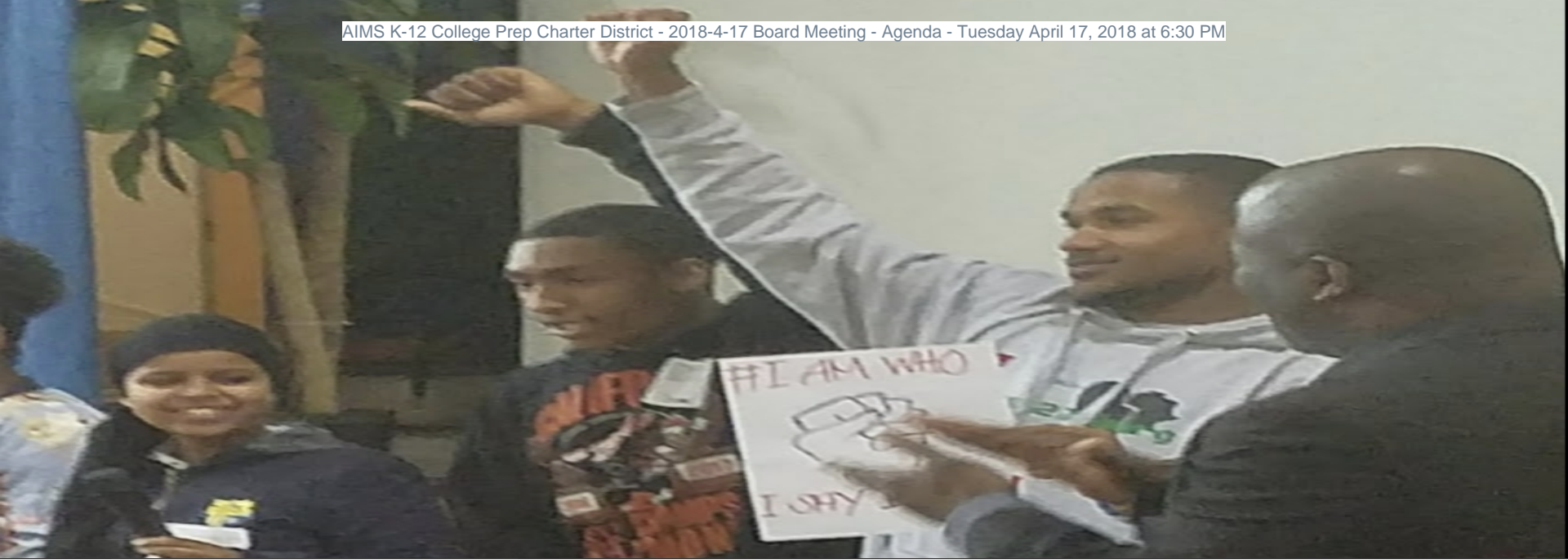
Superintendent's Report

Section: II. Non-Action Items
Item: B. Superintendent's Report
Purpose: FYI
Submitted by:
Related Material: Supt Board Report April 2018.pptx



SUPERINTENDENT BOARD REPORT AIMS K-12 APRIL 2017





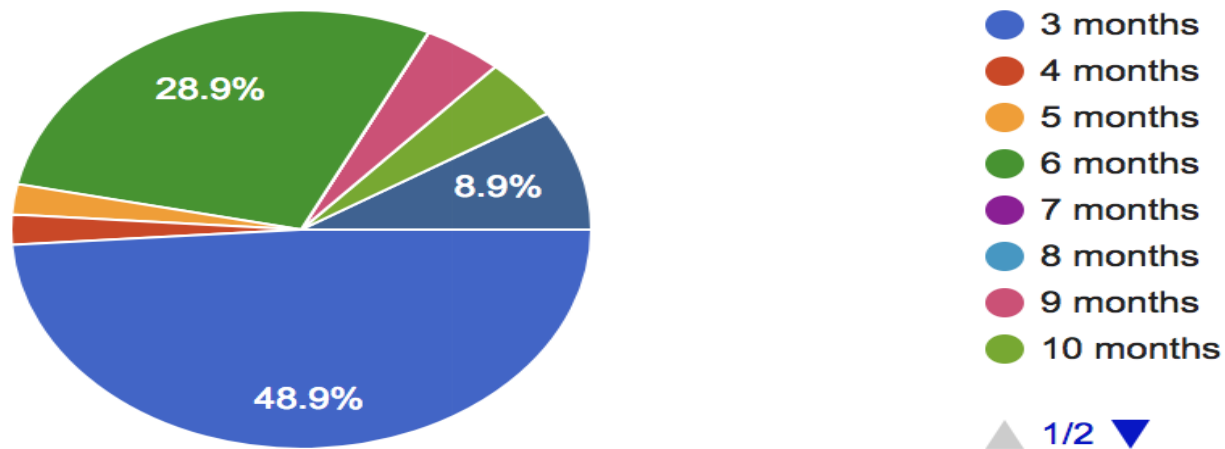
Academic Celebration

For the third year AIMS has been recognized by Innovate Schools for the Academic Performance of our African American students for closing the Achievement Gap. Innovate tracks and measures the success of traditionally underserved populations in schools.



Celebration of Attendance

Congratulations to AIPHS Sophomore Mandy Huang for achieving perfect attendance and being selected as one of the twenty Oakland Natives Give Back 2018 Every Day Counts Attendance Challenge winners for the third academic quarter! Because of Mandy's perfect attendance, Mandy also earned a check for a whopping \$500!



Reserves Inquiry

All AIMS staff was polled for their input about the amount of reserves the organization should hold. Currently 45 out of the over 100 employees have responded. The poll end on the 18th.

AIMS Agreed Upon Prop 39 Offers

01 Lakeview

02 Westlake

03 WOMS

04 MLK

05 Allendale

AIMS 2018-2019 Offers For Hire Timeline

Certificated

April 20, 2018

Classified

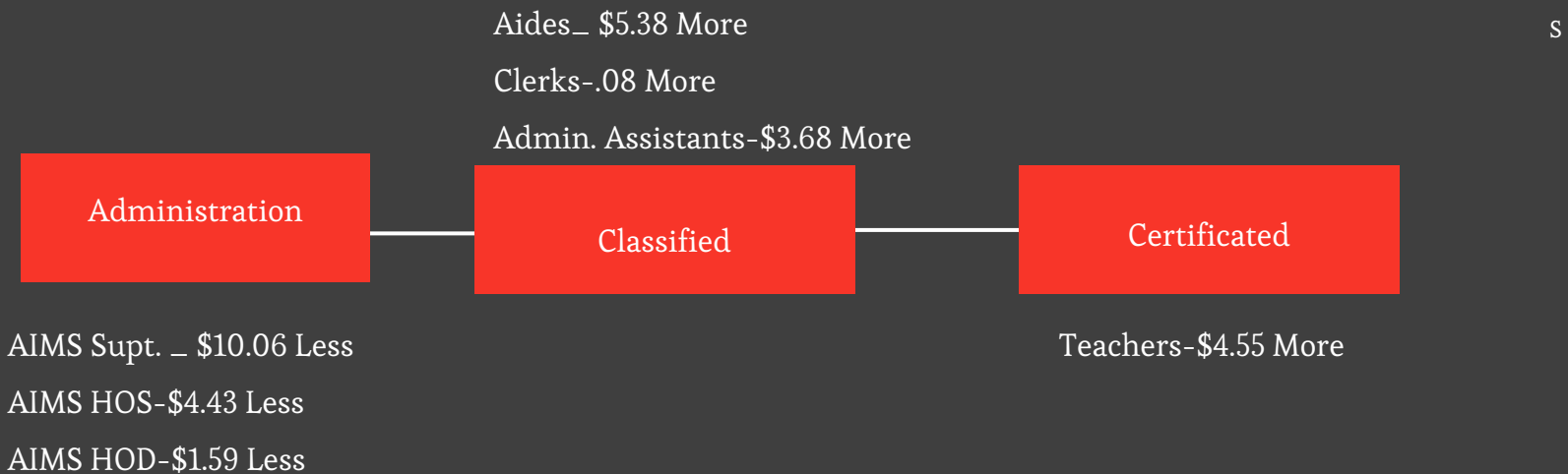
April 20, 2018

Administration

May 4, 2018

AIMS Salary and Compensation Report

The following data was shared with all AIMS employees. It is a comparison to hourly compensation from OUSD and GuideStar reports and AIMS hourly compensation (based on salaried amounts for leaders and teachers).



Coversheet

AIMS K-12 Report

Section: II. Non-Action Items
Item: C. AIMS K-12 Report
Purpose: FYI
Submitted by:
Related Material: April K-12 Board Report.pptx

AIMS K-12 Board Report

April 17th, 2018

Superintendent Maya Woods-Cadiz

Mrs. Erin Oh (K-2 Division Head)

Mr. Christopher Ahmad (3-5 Division Head)

Mr. Peter Holmquist (Middle School Division Head)

Mr. Tareyton Russ (AIPHS Head of School)

Mr. Maurice Williams (AIPHS Dean of Students)

Ms. Marisol Magana (Operations Director)

Ms. Tiffany Tung (Operations Manager)

Enrollment Numbers

AIPCS

145

AIPCS II

655

AIPHS

359

ADA & ADA %

AIPCS - 142.68 - 98.40%

AIPCS II - 639.68 - 97.63%

AIPHS - 343.68 - 96.20%

K-2 Updates



- 94% of students reading at grade level or above (using Lexile scale)
- 100% at grade level or above using Illuminate math benchmarks
- Retention criteria based on skills only taught in early elementary:
 - Literacy checkpoints
 - Self-regulation
 - Age

3-5 Updates

- SBAC TESTING WINDOW April 30th-June 5th
- 3-5 grade will take the test 2nd,3rd,and 4th week of May.
- This week, students are taking 2 end-of-the-year comprehensive benchmark tests
- They will spend next week reviewing them
- Students who complete all Khan Academy Missions will be invited to a special pizza party the first Friday in May. The student must get 100% in math and grammar.

Elementary Students *of the* Month



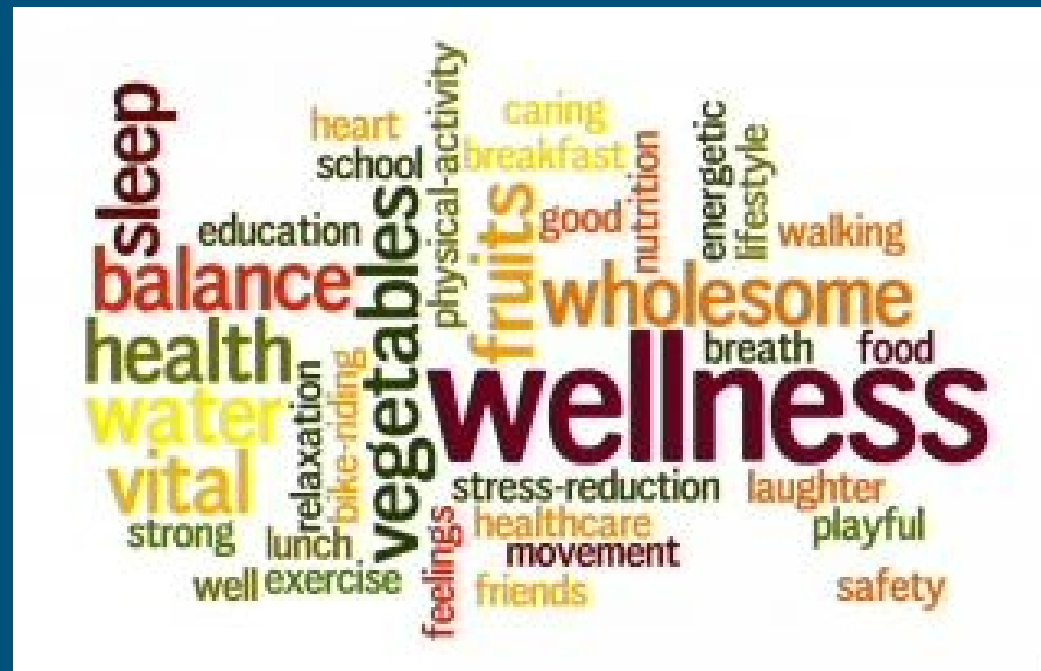
April AIMS Value: Family & Community

6-8 Updates

- Academic Focus Fridays have taken the place of Electives during much of the 3rd and 4th quarter. Subject matter reteaching is the usual focus after completing the curriculum, but these Friday sessions focus even further on SBAC preparations and strategies.
- Deng Jongkuch spoke to 7th grade classes today, about his experience as a “Lost Boy” of Sudan and a refugee.

More 6-8

- 18 classes received a classroom presentation on suicide prevention.
- Crisis Support Services of Alameda County presented over three days in our middle school.
- Students engaged with three presenters during their discussions and time with these crisis support counselors.
- This work fulfills some of AB-2246, Pupil suicide prevention policies (Sept. 2016)



K-12th Wellness Committee

- School Wellness (committee formed of school staff and parents).
- Met February and March to discuss best practices of nutrition and socio-emotional support to promote wellness of the whole-child.
- Positive Outcomes: Reduce chronic absenteeism, intentional about educating students and families about proper nutrition, health and wellness of the whole-child.
- Next Meeting: April 23, 5:30pm 12th St.



FAC

- Meeting postponed due to charter conference & spring break
- Next meeting: April 25, 6:30pm Lakeview
- Committees: Booster, Parent Education, Community
- Popcorn & Kid's Movie



FAC

- Meeting postponed due to charter conference & spring break
- Next meeting: April 25, 6:30pm Lakeview
- Committees: Booster, Parent Education, Community
- Popcorn & Kid's Movie



Perfect Attendance

- On Wednesday, March 28, AIPHS Sophomore Mandy Huang received a \$500 check from Giveback Natives Oakland for its everyday counts attendance challenge.

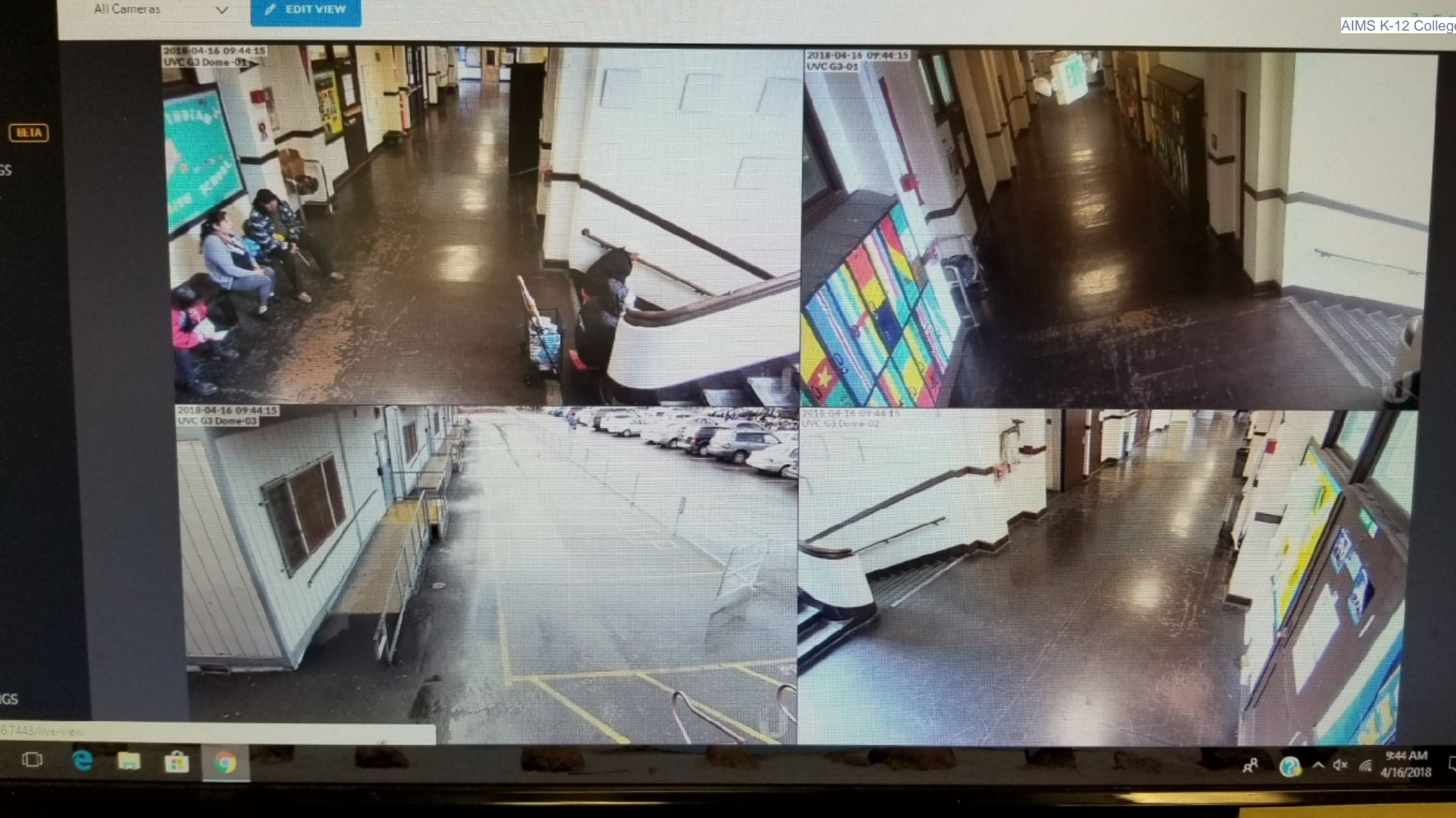


- Applications are available now for AIPHS students to enter the attendance challenge for their Q4



LLS Fundraiser

- On Wednesday, March 28, Representatives from the Leukemia and Lymphoma Society attended an AIPHS Pep Rally where the SGA made its \$1000 fundraising contribution to LLS.



Security Cameras

- AIPHS installed 4 Security Cameras on campus over the Spring Break.
- Long-term goal is to install as many 8-10 cameras on campus.
- This meets goals of 2017-2018 LCAP.





CHANGING THE NARRATIVE

By Kevin Ye



On February 20, 2018, AIMS held a very special event named "Changing the Narrative," which was a discussion held by African Americans working in the tech field right here in Oakland. In attendance were employees from Lyft, AirBnb, and Box. Together they held a discussion about Black Panther and how the film reflects upon modern culture and society. Organizers showed the audience stills from the film, one of which showcased the "Dora Milaje," which is a group of powerful women from the movie. After a quick discussion about the film, the event organizers and the audience went for a collective screening across the street in the Grand Lake Theatre.



AIPHS Student Newspaper

- The first issue of AIPHS's student Newspaper *The Golden Tribune* was released in April.
- *The Golden Tribune* is produced in Mr. Daniel Mark's 6th Period Journalism Class



AIPHS Senior Prom

- AIPHS will have a joint Junior / Senior Prom titled *A Night in Paris*, on Friday, June 1, 2018, from 5PM-11PM at Preservation Park, in Oakland.
- AIPHS's prom will be entirely outdoors and tickets are on sale for \$40

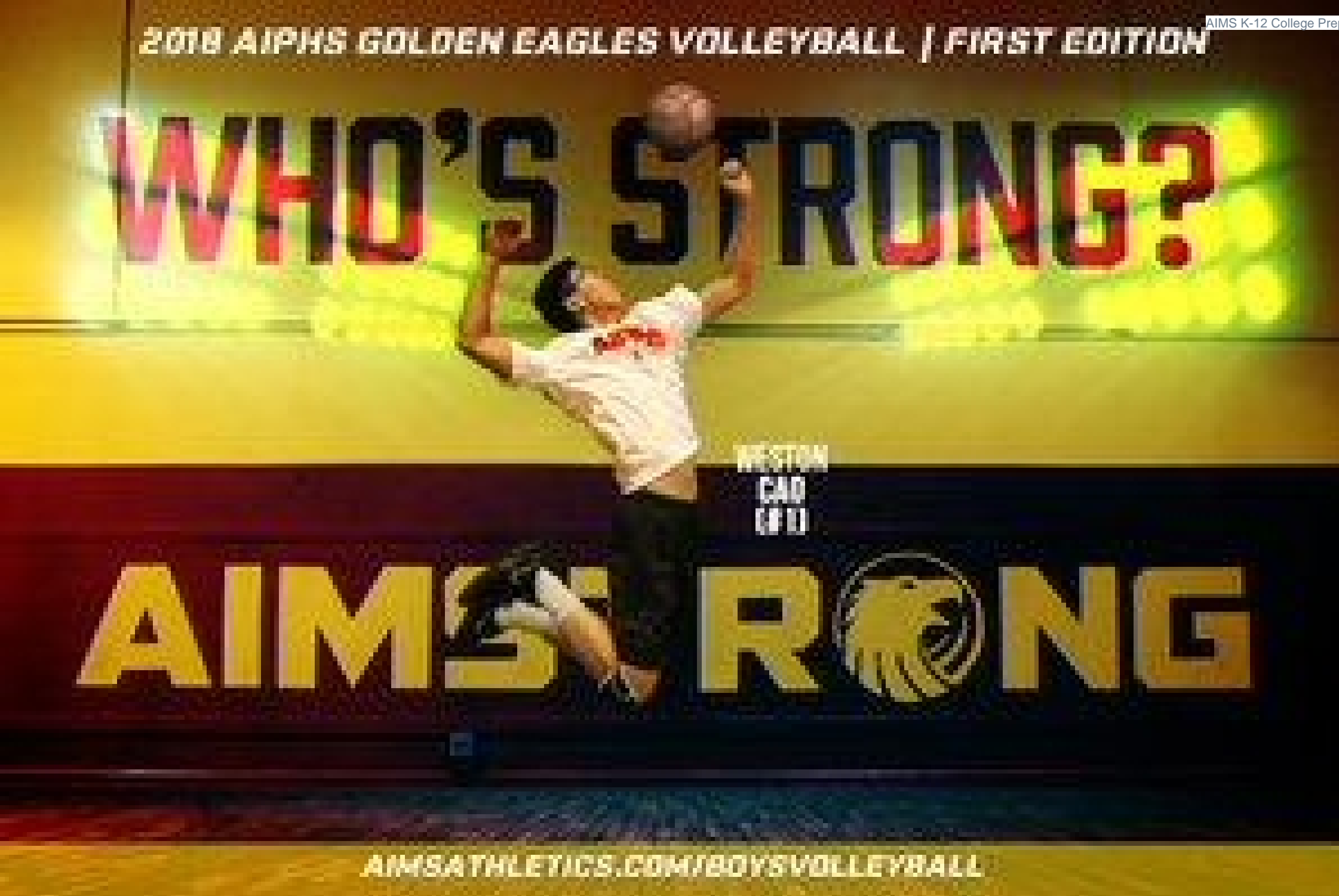




Lady Eagles Soccer Update

- The Lady Eagles Soccer Team is currently 3 -2 and will secure a playoff spot with today's win against Oakland Unity.
- Senior Paola Barron is currently ranked #4 in the state of California for goals scored in this season and is the league's leading MVP candidate.





Boys Volleyball Team Update

- The Boys Volleyball team earned their first victory of the season against Coliseum College Prep by defeating them 3-0
- The Boys Volleyball team will play against Oakland High, Oakland Tech, and Skyline High within the next two weeks



S.E.A. Eagles Update

- The AIPHS Swim Team held its first meet of the season on Thursday, April 12
- The girls and boys teams competed well considering their limited experience and several AIMS swimmers won their swim heats.
- AIPHS's next swim meet will be held on April 26 at Castlemont High School.



AIPHS Title IX Report

- AIPHS's Annual Title IX Report on the Athletics Program was released and is available online at aimsathletics.com/title-ix

**17-18
AIPHS
TITLE IX
REPORT**



AIMSTRONG

Coversheet

Consent Calendar

Section: III. Action Items
Item: A. Consent Calendar
Purpose: Vote
Submitted by:
Related Material:

1. Personnel Report April 2017-18.xlsx
2. 2018-3-20 Board Meeting Minutes.pdf
3. FFF February Invoice.pdf
4. YM&C March Invoice.PDF
5. VTD Oct 17 Invoice.pdf
7. OUSD 2017-2018 Facilities Use Fee.pdf
8. OUSD Second 2017-2018 Utilities Fee.pdf

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

1. Personnel Report April 2017-18.xlsx

**American Indian Model Schools
BOARD MEETING AGENDA
Tuesday March 20th, 2018 @ 6:30 pm
171 12th Street
Oakland, CA 94607**

I. CALL TO ORDER: 6:38

II. ROLL CALL:



Director Leung	P
Director Cook	P
Director Thompson	P
Director Wan	P
Director Edington	A

Quorum Established

III. ADOPTION OF AGENDA

M: Director Cook moves to adopt the agenda

2nd: Director Thompson

Director Leung	Y
Director Cook	Y
Director Thompson	Y
Director Wan	Y
Director Edington	A

Motion Passes

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None

Director Edington joins @ 6:45 pm

V. NON-ACTION ITEMS

1. Presentation from BoardOnTrack

- Kyle McCarthy

2. Finance Report

- Chief Business Officer, Ms. Susan Schickman & CSMC School Business Manager, Adrienne Barnes

3. President's Report

- Board President, Mr. Steven Leung

4. Spring Board Retreat to be Held at 12th Street Site

- Board President, Mr. Steven Leung

5. Superintendent's Report

- Superintendent Woods-Cadiz

6. AIMS k-12 Report

- Division Heads, Mr. Maurice Williams, Mr. Peter Holmquist, Mr. Christopher Ahmad, & Ms. Erin Oh

7. Operations Report

- Data, Accountability, and Operations Director, Ms. Marisol Magana
- Data, Accountability, and Operations Manager, Ms. Tiffany Tung

8. Human Resources Report

- Director of Human Resources, Mr. Rob Mayfield

9. ELD Coordinator Report

- ELD Coordinator, Ms. Vannee Chand

10. College Bound Kids Report

- CBK Coordinator, Mr. Matthew Gordan

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VII. DISCUSSION/ACTION ITEMS

1. Consent Calendar

i. Personnel Report

- Director of Human Resources, Mr. Rob Mayfield

ii. Approval of Job Description for Educational Coordinator, College Bound Kids

- Director of Human Resources, Mr. Rob Mayfield

iii. Approval of Board Meeting Minutes for February 20th, 2018

- Secretary to the Board of Directors, Mr. Joe Schickman

iv. Approval of Nob Hill Catering LunchMasters Invoices for February 2018

- Chief Financial Officer, Ms. Susan Schickman

v. Approval of CSMC Invoices for March/April 2018

- Chief Business Officer, Ms. Susan Schickman

- vi. Insurance Broker RFP
 - Chief Business Officer, Ms. Susan Schickman
- vii. Approval to Add Nob Hill Catering to Approved Vendor List
 - Board Treasurer, Director Edington
- viii. Approval of E-rate Contracts
 - Data, Accountability, and Operations Director, Ms. Marisol Magana

Director Edington Pulls the Insurance Broker Item Off the Consent Calendar

M: Director Cook moves to approve the consent calendar, excluding the Insurance Broker RFP
2nd: Director Thompson

Leung	Y
Cook	Y
Thompson	Y
Wan	Y
Edington	Y

Motion Passes

Motion: Director Edington moves to approve the Insurance Broker RFP with the following changes
 - RFP Proposals due April 16th or sooner
2nd: Thompson

Leung	Y
Cook	Y
Thompson	Y
Wan	Y
Edington	Y

Motion Passes

- 2. Discussion and Possible Action Regarding **Approving Installation of Visiplex PA System at AIMS 12th St. Site from the Same Approved Vendor as AIPHS**
 - Data, Accountability, and Operations Director, Ms. Marisol Magana

TABLED till APRIL

- 3. Discussion and Possible Action Regarding **Elections to Alter Board Committees to Comply with Brown Act After Adjustment in Board Size**
 - Board President, Mr. Steven Leung

President Leung Volunteers to step down from Legal Committee

M: Director Thompson moves to approve the removal of President Leung from the Legal Committee
2nd: Director Edington

Leung	Y
Cook	Y
Thompson	Y
Wan	Y
Edington	Y

Motion Passes

VIII. PUBLIC COMMENT ON CLOSED SESSION ITEMS

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IX. RECESS TO CLOSED SESSION: 8:34 pm

- Conference with Legal Counsel – Anticipated Litigation (§ 54956.9)
Attorney: Doug Freifeld
- Real Property Negotiations (§ 54956.8)
171 12th. St. Oakland Ca 94607

X. RECONVENE FROM CLOSED SESSION 10:17

XI. ROLL CALL

Director Leung	P
Director Cook	P
Director Thompson	P
Director Wan	P
Director Edington	A

Quorum Established

XII. REPORT FROM CLOSED SESSION - The AIMS Board appoints attorney Brandon Schantz to represent AIMS in opening discussions with Procopio re: invoices

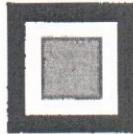
XIII. ITEMS FOR NEXT AGENDA

XIV. ADJOURNMENT: 10:18

NOTICES

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I, _____ hereby certify that I posted this agenda at the AIMS Campus 171 12th street, Oakland, CA 94607 on, _____, at _____ PM Certification of Posting



Fagen Friedman & Fulfroost LLP

6300 Wilshire Blvd, Suite 1700
 Los Angeles, CA 90048-5204
 Tel 323-330-6300 Fax 323-330-6311
 Federal Tax ID: 42-1706595

American Indian Model Schools
 Maya Woods-Cadiz, Superintendent
 171 12th Street
 Oakland, CA 94607

February 28, 2018
 Invoice # 57237-1

Client/Matter: 718-00101
 Re: Unfair Practice Charge (SF-CE-3190-E)
 For Services Rendered Through February 28, 2018

Previous Balance		22,259.50
Payments		-12,234.00
Balance Forward		10,025.50
Current Fees	238.50	
Total Current Due		238.50
	Total Due	10,264.00

Approved By SPS Amount \$ 238.50
 School/Class: AIFCS-020 ___ AIPCSII-030 ___ AIPHS-040 ___
 Other Class: Central-010 Non Public Fund ___
 G/L Acct#: 5905
 Posted on QB: Sent to CSMS: ___

Wire Instructions:

Bank : Comerica Bank, Los Angeles, CA 90048 FBO : Fagen Friedman & Fulfroost LLP
 A/C# : 1893086270 ABA#: 121137522
 Ref. # : 57237-1

Remittance due upon Receipt



Fagen Friedman & Fulfrost LLP

6300 Wilshire Blvd, Suite 1700
 Los Angeles, CA 90048-5204
 Tel 323-330-6300 Fax 323-330-6311
 Federal Tax ID: 42-1706595

American Indian Model Schools
 Maya Woods-Cadiz, Superintendent
 171 12th Street
 Oakland, CA 94607

February 28, 2018
 Invoice # 57237-2

Client/Matter: 718-00102
 Re: TAIMS Negotiations 2016-17
 For Services Rendered Through February 28, 2018

Previous Balance		4,167.57
Payments		-60.07
Balance Forward		4,107.50
Current Fees	2,279.00	
Current Disbursements	5.08	
Total Current Due		2,284.08
Total Due		6,391.58

Approved By MS Amount \$ 2,284.08
 School/Class: AIPCS-020 AIPCSII-030 AIPHS-040
 Other Class: Central-010 Non Public Fund
 G/L Acct#: 5805
 Posted on QB: Sent to CSMS:

Wire Instructions:

Bank : Comerica Bank, Los Angeles, CA 90048 FBO : Fagen Friedman & Fulfrost LLP
 A/C# : 1893086270 ABA# : 121137522
 Ref. # : 57237-2

Remittance due upon Receipt



Fagen Friedman & Fulfroost LLP

6300 Wilshire Blvd, Suite 1700
 Los Angeles, CA 90048-5204
 Tel 323-330-6300 Fax 323-330-6311
 Federal Tax ID: 42-1706595

American Indian Model Schools
 Maya Woods-Cadiz, Superintendent
 171 12th Street
 Oakland, CA 94607

February 28, 2018
 Invoice # 57237-3

Client/Matter: 718-00108
 Re: Unfair Practice Charge SF-CE-3237-E
 For Services Rendered Through February 28, 2018

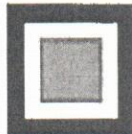
Previous Balance		0.00
Current Fees	26.50	
Total Current Due		26.50
	Total Due	26.50

Approved By: AFB Amount \$ 26.50
 School/Class: AIPCS-020 AIPCSII-030 AIPHS-040
 Other Class: Central-010 Non Public Fund
 G/L Acct#: 5805
 Posted on QB: Sent to CSMS

Wire Instructions:

Bank : Comerica Bank, Los Angeles, CA 90048 FBO : Fagen Friedman & Fulfroost LLP
 A/C# : 1893086270 ABA#: 121137522
 Ref. # : 57237-3

Remittance due upon Receipt



Fagen Friedman & Fulfroft LLP

6300 Wilshire Blvd, Suite 1700
 Los Angeles, CA 90048-5204
 Tel 323-330-6300 Fax 323-330-6311
 Federal Tax ID: 42-1706595

American Indian Model Schools
 Maya Woods-Cadiz, Superintendent
 171 12th Street
 Oakland, CA 94607

February 28, 2018
 Invoice # 57237-4

Client/Matter: 718-00109
 Re: Bargaining Impasse SF-IM-3161-E
 For Services Rendered Through February 28, 2018

Previous Balance		1,991.79
Payments		-1,432.61
Balance Forward		559.18
Current Fees	3,153.50	
Total Current Due		3,153.50
	Total Due	3,712.68

Approved By [Signature] Amount \$ 3,153.50
 School/Class: AIPCS-020 AIPCSII-030 AIPHS-040
 Other Class: Central-010 Non Public Fund
 G/L Acct#: 5865
 Posted on QB Sent to CSMS:

Wire Instructions:

Bank : Comerica Bank, Los Angeles, CA 90048 FBO : Fagen Friedman & Fulfroft LLP
 A/C# : 1893086270 ABA#: 121137522
 Ref. # : 57237-4

Remittance due upon Receipt



Fagen Friedman & Fulfrosts LLP

6300 Wilshire Blvd, Suite 1700
 Los Angeles, CA 90048-5204
 Tel 323-330-6300 Fax 323-330-6311
 Federal Tax ID: 42-1706595

American Indian Model Schools
 Maya Woods-Cadiz, Superintendent
 171 12th Street
 Oakland, CA 94607

February 28, 2018
 Invoice # 57237-5

Client/Matter: 718-00111
 Re: Unfair Practice Charge SF-CE-3258-E
 For Services Rendered Through February 28, 2018

Previous Balance		0.00
Current Fees	2,279.00	
Total Current Due		2,279.00
	Total Due	2,279.00

Approved By: JS Amount \$ 2,279.00
 School/Class: AIPCS-020 AIPCSII-030 AIPHS-040
 Other Class: Central-010 Non Public Fund
 G/L Acct# 5805
 Posted on QB Sent to CSMS

Wire Instructions: Bank : Comerica Bank, Los Angeles, CA 90048 FBO : Fagen Friedman & Fulfrosts LLP
 A/C# : 1893086270 ABA#: 121137522
 Ref. # : 57237-5

Remittance due upon Receipt



LAW OFFICES OF YOUNG, MINNEY & CORR, LLP

655 UNIVERSITY AVENUE, SUITE 150
SACRAMENTO, CA 95825

TEL 916.646.1400 ■ FAX 916.646.1300
WWW.MYCHARTERLAW.COM

American Indian Model Schools
Attn: Susan Schickman, Chief Business Officer
171 12th Street
Oakland, CA 94607

April 5, 2018

Invoice # 103186

Services through 3/31/2018.

Previous Balance	\$868.00
Total Payments and Credits	(\$840.50)
Current Charges	\$0.00
Payments From Retainer Account	<u>\$0.00</u>
Total Owed Firm	\$27.50
Remaining Retainer Credit Balance	\$0.00
Clients with no past due balance who pay within twenty days of the date of this invoice may receive a 5% discount on services by paying this amount:	\$27.50

All invoices are due and payable upon receipt. Thank you.

CONVENIENT LOCATIONS TO SERVE YOU
SACRAMENTO ■ LOS ANGELES ■ SAN DIEGO ■ WALNUT CREEK



LAW OFFICES OF YOUNG, MINNEY & CORR, LLP

655 UNIVERSITY AVENUE, SUITE 150
SACRAMENTO, CA 95825

TEL 916.646.1400 ■ FAX 916.646.1300
WWW.MYCHARTERLAW.COM

April 5, 2018

Tax ID # 94-3307075
103186

American Indian Model Schools
Attn: Susan Schickman, Chief Business Officer
171 12th Street
Oakland, CA 94607

	<u>Amount</u>
Previous balance	\$868.00
3/23/2018 Payment - thank you. Check No. 50000198	<u>(\$840.50)</u>
Total payments and adjustments	<u>(\$840.50)</u>
Total Balance Due	<u><u>\$27.50</u></u>

<u>Current</u>	<u>30 Days</u>	<u>60 Days</u>	<u>90 Days</u>	<u>120+ Days</u>
\$0.00	\$27.50	\$0.00	\$0.00	\$0.00



Vavrinek, Trine, Day & Co., LLP
Certified Public Accountants & Consultants

VALUE THE DIFFERENCE

American Indian Model Schools
171 12th Street
Oakland, CA 94607

CLIENT ID: 00-5007117
OWNER: MSM
INVOICE NUMBER: 0139568-IN
DATE: 10/31/2017

Please return top portion with remittance.

Amount enclosed \$ _____



Vavrinek, Trine, Day & Co., LLP
Certified Public Accountants & Consultants

VALUE THE DIFFERENCE

American Indian Model Schools

Auditing services rendered during October 2017 pertaining to the 2016/2017 fiscal year.
\$14,500.00

\$13,475.00

Less 10%
(\$1,450.00)

*Not credited
in O/S
Balance*

Expenses
\$425.00

Total due \$13,475.00

Approved By: SB Amount \$ 13,475.00

School/Class: AIPCS-020 ___ AIPCSII-030 ___ AIPHS-040 ___

Other Class: Central-010 Non Public Fund ___

G/L Acct#: 5806

Posted on QB: Sent to CSMS: ___

*charged
14,925*

INVOICE TOTAL: \$13,475.00

CLIENT ID: 00-5007117
INVOICE NUMBER: 0139568-IN
DATE: 10/31/2017

Bill

American Indian Model Schools
 171 12th Street
 Oakland, CA 94607

Date	Ref. No.
10/31/2017	0139568-IN

Vendor
Vavrinek, Trine, Day & Co . LLP Accounts Payable Dept. 10681 Foothill Blvd., Suite 300 Rancho Cucamonga, CA 91730

Bill Due	10/31/2017
Terms	Due on receipt
Memo	Invoice 0139568-IN Client 5007117

Expenses

Account	Memo	Amount	Customer:Job	Class
CMO-Audit Services	Auditing Services as of October 2017 FYE 2016-2017	14,500.00		17-18 Central 010
CMO-Audit Services	Audit expenses as of October 2017 FYE n2016-2017	425.00		17-18 Central 010
CMO-Audit Services	10% retention credit to be received when audit approved by state	-1,450.00		17-18 Central 010

Expense Total : 13,475.00

Bill Total : \$13,475.00



OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

INVOICE

Please Mail Check To:

1000 Broadway, Suite 450
Oakland, CA 94607
Attn: Mike Nguyen- Accounting Dept.
510-879-1043

INVOICE NO. **AIMS-18H**

DATE: March 22, 2018

****PAYMENT SCHEDULE**

SEPTEMBER 1, 2017
OCTOBER 1, 2017
NOVEMBER 1, 2017
DECEMBER 1, 2017
JANUARY 1, 2018
FEBRUARY 1, 2018
MARCH 1, 2018
APRIL 1, 2018
MAY 1, 2018

PAYMENT MADE TO DATE:

Check #	40000614
Check #	40000675
Check #	50000096
Check #	50000106
Check #	50000098
Check #	50000161
Check #	50000259
Check #	
Check #	
Check #	

TO:

American Indian Public Charter
School
Maya Woods-Cadiz
Susan Schickman
Larry Atkins

DESCRIPTION	TOTAL
2017-18 Facility Use Fee Billing	
Facility Use Fee = \$78,309.54 Custodial Fee = \$72,894	
Lease fees:(annual fee) / 9 months = \$151,203.54/ 9 =	16,800.39
PAYMENT IS DUE BY: April 15, 2018	
Approved By: <u>SB</u> Amount \$ <u>16,800.39</u>	
School/Class: AIPCS-020 ___ AIPCSII-030 ___ AIPHS-040 <input checked="" type="checkbox"/>	
Other Class: Central-010 ___ Non Public Fund ___	
G/L Acct#: <u>5600</u>	
Posted on QB: <input checked="" type="checkbox"/> Sent to CSMS: ___	
TOTAL DUE	\$ 16,800.39

Make all checks payable to Oakland Unified School District
THANK YOU FOR PROMPT PAYMENT!



OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

INVOICE

1000 Broadway, Suite 450
Oakland, CA 94607
Phone: (510) 879-0132
minh.co@ousd.org

Date: 04/03/18
Invoice #: B18UTL-AIPCH

SECOND Utilities Billing

Bill To:	Payment Received To-Date:
-----------------	----------------------------------

American Indian Public Charter High
Attn: Susan Schickman, Financial Administrator
746 Grand Avenue
Oakland, CA 94610

Check #40000705, Dated 10/31/17, \$6,660.54

Description	Amount Due:
2017/18 SECOND Utilities Fee Billing (36.4% shared cost of site total)	
PG&E = \$9,455.42	\$ 9,455.42
Waste Management = \$312.87 + \$1,806.28 = \$2,119.15	\$ 2,119.15
EBMUD = \$1,746.23 + \$107.95 + \$170.77 = \$2,024.95	\$ 2,024.95
PAYMENT DUE BY April 25, 2018	
AMOUNT DUE:	\$ 13,599.52

Make all checks payable to *Oakland Unified School District*.
Thank you for your prompt payment!

2017/18 Utilities Billing for AIPCHS - Second Billing 4/3/18

Location: 746 Grand Avenue (Lakeview)

PG&E

Account: 8438013631-1

Month	Amount
10/27/17	\$ 3,357.11
11/28/17	\$ 3,257.89
12/27/17	\$ 2,934.65
1/26/18	\$ 5,133.94
2/27/18	\$ 4,279.96
3/28/18	\$ 7,012.88

Total	\$ 25,976.43
Shared Cost %	x 36.4%
= Amount DUE	\$ 9,455.42

WM

Customer ID: 00511-28908

Month	Amount
Oct.	\$ 152.26
Nov.	\$ 152.26
Dec.	\$ 152.26
Jan.	\$ 101.45
Feb.	\$ 149.05
Mar.	\$ 152.26

TOTAL	\$ 859.54
Shared Cost %	x 36.4%
= Amount DUE	\$ 312.87

Customer ID: 14894-48902

Month	Amount
Oct.	\$ 862.14
Nov.	\$ 850.38
Dec.	\$ 850.38
Jan.	\$ 551.85
Feb.	\$ 847.17
Mar.	1000.38

TOTAL	\$ 4,962.30
Shared Cost %	x 36.4%
= Amount DUE	\$ 1,806.28

Total
\$ **2,119.15**

EBMUD

Account: 34227300001

Month	Amount
12/13/17	\$ 1,992.28
2/13/18	\$ 2,805.05

TOTAL	\$ 4,797.33
Shared Cost %	x 36.4%
= Amount DUE	\$ 1,746.23

Account: 34239800001

Month	Amount
12/13/17	\$ 145.86
2/13/18	\$ 150.71

TOTAL	\$ 296.57
Shared Cost %	x 36.4%
= Amount DUE	\$ 107.95

Account: 34239900001

Month	Amount
12/13/17	\$ 234.58
2/13/18	\$ 234.58

TOTAL	\$ 469.16
Shared Cost %	x 36.4%
= Amount DUE	\$ 170.77

Total
\$ **2,024.95**



ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 8438013631-1

Statement Date: 10/27/2017

Due Date: 11/13/2017

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 746 GRAND AVE			
Service Agreement ID: 8438013392 LAKEVIEW #130			
Electric Charges	1006712163	12,020.320000 kWh	\$3,307.91
Total			\$3,307.91
Service For: 746 GRAND AVE			
Service Agreement ID: 8512173270 LAKEVIEW #130			
Gas Charges	43811746	1.000000 Therms	\$49.20
Total			\$49.20

\$3,357.11



ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 8438013631-1

Statement Date: 11/28/2017

Due Date: 12/15/2017

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 746 GRAND AVE			
Service Agreement ID: 8438013392 LAKEVIEW #130			
Electric Charges	1006712163	12,528.520000 kWh	\$2,536.07
Total			\$2,536.07
Service For: 746 GRAND AVE			
Service Agreement ID: 8512173270 LAKEVIEW #130			
Gas Charges	43811746	686.000000 Therms	\$721.82
Total			\$721.82

\$3,257.8



ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 8438013631-1

Statement Date: 12/27/2017

Due Date: 01/16/2018

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 746 GRAND AVE			
Service Agreement ID: 8438013392 LAKEVIEW #130			
Electric Charges	1006712163	13,114.280000 kWh	\$2,736.61
Total			\$2,736.61
Service For: 746 GRAND AVE			
Service Agreement ID: 8512173270 LAKEVIEW #130			
Gas Charges	43811746	136.000000 Therms	\$198.04
Total			\$198.04

\$2,934.6



ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 8438013631-1
 Statement Date: 01/26/2018
 Due Date: 02/12/2018

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 746 GRAND AVE			
Service Agreement ID: 8438013392 LAKEVIEW #130			
Electric Charges	1006712163	11,915.720000 kWh	\$2,472.11
Total			\$2,472.11
Service For: 746 GRAND AVE			
Service Agreement ID: 8512173270 LAKEVIEW #130			
Gas Charges	43811746	2,332.000000 Therms	\$2,661.83
Total			\$2,661.83

\$5,133.94



ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 8438013631-1
 Statement Date: 02/27/2018
 Due Date: 03/16/2018

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 746 GRAND AVE			
Service Agreement ID: 8438013392 LAKEVIEW #130			
Electric Charges	1006712163	14,567.640000 kWh	\$2,858.81
Total			\$2,858.81
Service For: 746 GRAND AVE			
Service Agreement ID: 8512173270 LAKEVIEW #130			
Gas Charges	43811746	1,188.000000 Therms	\$1,421.15
Total			\$1,421.15

\$4,279.96



ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 8438013631-1
 Statement Date: 03/28/2018
 Due Date: 04/16/2018

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 746 GRAND AVE			
Service Agreement ID: 8438013392 LAKEVIEW #130			
Electric Charges	1006712163	13,669.080000 kWh	\$2,802.44
Total			\$2,802.44
Service For: 746 GRAND AVE			
Service Agreement ID: 8512173270 LAKEVIEW #130			
Gas Charges	43811746	3,584.000000 Therms	\$4,210.44
Total			\$4,210.44

\$7,012.88



INVOICE

Customer ID: 00490-88900
 Customer Name: OPS ADMINISTRATION MASTER 999R
 Service Period: AUGUST SERVICE
 Invoice Date: 09/01/2017
 Invoice Number: 2679258-2216-0

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714		Customer ID: 00511-28908		
		PO#: 051921		
Description	Date	Ticket	Quantity	Amount
1 - 6 Yard dumpster recycle 1 time per week	10/01/17		1.00	152.26
Total charges for service location				152.26

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714		Customer ID: 00511-28908		
		PO#: 051921		
Description	Date	Ticket	Quantity	Amount
Prorated credit ///credit for locks	11/13/17		1.00	(4.98)
Lock	11/01/17		1.00	4.98
1 - 6 Yard dumpster recycle 1 time per week	11/01/17		1.00	152.26
Total charges for service location				152.26

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714		Customer ID: 00511-28908		
		PO#: 051921		
Description	Date	Ticket	Quantity	Amount
Prorated credit ///crdt lock fees	12/07/17		1.00	(4.98)
Lock	12/01/17		1.00	4.98
1 - 6 Yard dumpster recycle 1 time per week	12/01/17		1.00	152.26
Total charges for service location				152.26

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714		Customer ID: 00511-28908		
		PO#: 051921		
Description	Date	Ticket	Quantity	Amount
Prorated service lkf proration	12/28/17		1.00	(0.64)
Prorated recycle 6 1! Proration	12/28/17		1.00	(19.65)
Prorated service lkf proration	01/08/18		1.00	(1.12)
Prorated recycle 6 1! Proration	01/08/18		1.00	(34.38)
Lock	01/01/18		1.00	4.98
1 - 6 Yard dumpster recycle 1 time per week	01/01/18		1.00	152.26
Total charges for service location				101.45

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714		Customer ID: 00511-28908		
		PO#: 051921		
Description	Date	Ticket	Quantity	Amount
Prorated credit credit jan lock/push	01/31/18		1.00	(3.21)
Lock	02/01/18		1.00	0.00
1 - 6 Yard dumpster recycle 1 time per week	02/01/18		1.00	152.26
Total charges for service location				149.05

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714		Customer ID: 00511-28908		
		PO#: 051921		
Description	Date	Ticket	Quantity	Amount
Lock	03/01/18		1.00	0.00
1 - 6 Yard dumpster recycle 1 time per week	03/01/18		1.00	152.26
Total charges for service location				152.26

859.54



INVOICE

Customer ID: 26246-18907
 Customer Name: OPS MASTER ACCOUNT 999C
 Service Period: AUGUST SERVICE
 Invoice Date: 09/01/2017
 Invoice Number: 2679287-2216-9

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714
Customer ID: 14894-48902

Description	Date	Ticket	Quantity	Amount
Extra pickup 96 gallon cart - organics organics	10/06/17	505462	1.00	11.76
Ticket Total				11.76
96 Gallon cart service - organics	10/01/17		1.00	33.94
1 - 7 Yard dumpster 1 time per week	10/01/17		1.00	816.44
Total charges for service location				862.14

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714
Customer ID: 14894-48902

Description	Date	Ticket	Quantity	Amount
Prorated credit ///credit for locks	11/13/17		1.00	(4.98)
Lock	11/01/17		1.00	4.98
96 Gallon cart service - organics	11/01/17		1.00	33.94
1 - 7 Yard dumpster 1 time per week	11/01/17		1.00	816.44
Total charges for service location				850.38

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714
Customer ID: 14894-48902

Description	Date	Ticket	Quantity	Amount
Prorated credit ///crdt lock fees	12/07/17		1.00	(4.98)
Lock	12/01/17		1.00	4.98
96 Gallon cart service - organics	12/01/17		1.00	33.94
1 - 7 Yard dumpster 1 time per week	12/01/17		1.00	816.44
Total charges for service location				850.38

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714
Customer ID: 14894-48902

Description	Date	Ticket	Quantity	Amount
Prorated green/yard waste o9c proration	12/28/17		1.00	(4.38)
Prorated service 711 proration	12/28/17		1.00	(105.35)
Prorated service lkf proration	12/28/17		1.00	(0.64)
Prorated green/yard waste o9c proration	01/08/18		1.00	(7.66)
Prorated service 711 proration	01/08/18		1.00	(184.36)
Prorated service lkf proration	01/08/18		1.00	(1.12)
Lock	01/01/18		1.00	4.98
96 Gallon cart service - organics	01/01/18		1.00	33.94
1 - 7 Yard dumpster 1 time per week	01/01/18		1.00	816.44
Total charges for service location				551.85

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714
Customer ID: 14894-48902

Description	Date	Ticket	Quantity	Amount
Prorated credit credit jan lock/push	01/31/18		1.00	(3.21)
Lock	02/01/18		1.00	0.00
96 Gallon cart service - organics	02/01/18		1.00	33.94
1 - 7 Yard dumpster 1 time per week	02/01/18		1.00	816.44
Total charges for service location				847.17

Details for Service Location: Ops Lakeview, 746 Grand Ave, Oakland CA 94610-2714
Customer ID: 14894-48902

Description	Date	Ticket	Quantity	Amount
Overage service yards 11384015	02/19/18	694891	1.00	150.00
Ticket Total				150.00
Lock	03/01/18		1.00	0.00
96 Gallon cart service - organics	03/01/18		1.00	33.94
1 - 7 Yard dumpster 1 time per week	03/01/18		1.00	816.44
Total charges for service location				1,000.38



EBMUD 1-866-40-EBMUD

YOUR ACCOUNT NO. IS: 34227300001

Next Read Date is 02/06/2018
Your Payment is Due by 12/28/2017

Every minute, EBMUD gathers and treats Sierra snowmelt and sends it through a complex system of pipes to every neighborhood in our service area. Want to find out how the water magic happens? Find out more at ebmud.com or request classroom materials at ebmud.com/teachers.

- [EBMUD Home Page](#)
- [View Newsletter](#)
- [Bill FAQs](#)
- [Rates & Charges](#)
- [Contact Info](#)



Oakland Unified School District FSCP
C/O Mailroom/AP-Norman Hazzard
900 HIGH ST
OAKLAND, CA 94601-4405

Bill Date: 12/13/17
Billing Period
From 10/5/17 To 12/7/17

For: 746 Grand Ave
Schools

PREVIOUS CHARGES AND CREDITS

	AMOUNT	TOTAL
PREVIOUS AMOUNT DUE	1,937.68	
FULL PAYMENT - 10/27/17	-1,937.68	0.00

WATER CHARGES - EBMUD

WATER SERVICE CHARGE	195.16	
WATER FLOW CHARGE 195 UNITS @4.85	945.75	1,140.91

WASTEWATER CHARGES - EBMUD

WASTEWATER TREATMENT CHARGE	339.26	
SF BAY POLLUTION PREVENTION FEE	10.96	350.22

CITY OF OAKLAND SEWER SERVICE

501.15

PLEASE SEE REVERSE SIDE FOR BILLING EXPLANATION

Please Pay This Amount Now Due

1,992.28

METER SIZE	ELEV. Band	METER READINGS		UNITS	CONSUMPTION INFORMATION		
		Current	Previous		Gallons	Days	Gal/Day
2 inch	1	21,160	20,965	195	145,860	63	2,315
		LAST	YEAR	195	145,860	63	2,315

PLEASE DETACH AND RETURN THIS PAYMENT STUB WITH CHECK OR MONEY ORDER PAYABLE TO EBMUD
746 Grand Ave, Oakland, CA 946102714 10/5/17 12/7/17 ACCOUNT NO.: 34227300001

7158

Pay by credit/ATM/e-check for a fee.
Call 1-888-963-0909

Mail payment to:

TOTAL PREVIOUS 0.00
TOTAL CURRENT 1,992.28

EBMUD PAYMENT CENTER
PO BOX 1000
OAKLAND CA 94649-0001

Please Pay This Amount Now Due

1,992.28

3422730000140001992280000000000006



EBMUD 1-866-40-EBMUD

YOUR ACCOUNT NO. IS: 34227300001

Next Read Date is 04/10/2018

Your Payment is Due by 02/28/2018

Working for you, 24/7. Whether you're at work or home, asleep or burning the midnight oil,

EBMUD employees are always working for you. Meet our staff at ebmud.com/onthejob.

And remember, if you're having trouble paying your bill, we can help.

Just call us at 866-40-EBMUD.

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[Contact Info](#)



Oakland Unified School District FSCP
C/O Mailroom/AP-Norman Hazzard
900 HIGH ST
OAKLAND, CA 94601-4405

Bill Date: 02/13/18

Billing Period

From To
12/7/17 2/6/18

For: 746 Grand Ave
Schools

AMOUNT TOTAL

PREVIOUS CHARGES AND CREDITS

PREVIOUS AMOUNT DUE	1,992.28	
FULL PAYMENT - 01/05/18	-1,992.28	0.00

WATER CHARGES - EBMUD

WATER SERVICE CHARGE	195.16	
WATER FLOW CHARGE 283 UNITS @4.85	1,372.55	1,567.71

WASTEWATER CHARGES - EBMUD

WASTEWATER TREATMENT CHARGE	487.10	
SF BAY POLLUTION PREVENTION FEE	10.96	498.06

CITY OF OAKLAND SEWER SERVICE

739.28

PLEASE SEE REVERSE SIDE FOR BILLING EXPLANATION

Please Pay This Amount Now Due

2,805.05

METER SIZE	ELEV. Band	METER READINGS		UNITS	CONSUMPTION INFORMATION		
		Current	Previous		Gallons	Days	Gal/Day
2 inch	1	21,443	21,160	283	211,684	61	3,470
		LAST	YEAR	181	135,388	62	2,183

PLEASE DETACH AND RETURN THIS PAYMENT STUB WITH CHECK OR MONEY ORDER PAYABLE TO EBMUD
746 Grand Ave, Oakland, CA 946102714 12/7/17 2/6/18 ACCOUNT NO.: 34227300001

7153

Pay by credit/ATM/e-check for a fee.
Call 1-888-963-0909

TOTAL PREVIOUS 0.00
TOTAL CURRENT 2,805.05

Mail payment to:

EBMUD PAYMENT CENTER
PO BOX 1000
OAKLAND CA 94649-0001

Please Pay This Amount Now Due

2,805.05

3422730000140002805050000000000008



EBMUD 1-866-40-EBMUD

YOUR ACCOUNT NO. IS: 34239800001

Next Read Date is 02/06/2018

Your Payment is Due by 12/28/2017

Every minute, EBMUD gathers and treats Sierra snowmelt and sends it through a complex system of pipes to every neighborhood in our service area. Want to find out how the water magic happens? Find out more at ebmud.com or request classroom materials at ebmud.com/teachers.

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- [Bill FAQs](#)
- [Rates & Charges](#)
- [Contact Info](#)



Oakland Unified School District FSCP
Attn:Mailroom/AP-Norman Hazzard
900 HIGH ST
OAKLAND, CA 94601-4405

Bill Date: 12/13/17

Billing Period

From To
10/5/17 12/7/17

For: 746 Grand Ave
Irrigation Use Only

AMOUNT TOTAL

PREVIOUS CHARGES AND CREDITS

PREVIOUS AMOUNT DUE	141.01	
FULL PAYMENT - 10/27/17	-141.01	0.00

WATER CHARGES - EBMUD

WATER SERVICE CHARGE	68.26	
WATER FLOW CHARGE 16 UNITS @4.85	77.60	145.86



PLEASE SEE REVERSE SIDE FOR BILLING EXPLANATION

Please Pay This Amount Now Due

145.86

METER SIZE	ELEV. Band	METER READINGS		UNITS	CONSUMPTION INFORMATION		
		Current	Previous		Gallons	Days	Gal/Day
1 inch	1	82	66	16	11,968	63	190
		LAST	YEAR	3	2,244	63	35

PLEASE DETACH AND RETURN THIS PAYMENT STUB WITH CHECK OR MONEY ORDER PAYABLE TO EBMUD
746 Grand Ave, Oakland, CA 946102714 10/5/17 12/7/17 ACCOUNT NO.: 34239800001
7152

Pay by credit/ATM/e-check for a fee.
Call 1-888-963-0909

Mail payment to:

TOTAL PREVIOUS 0.00
TOTAL CURRENT 145.86

EBMUD PAYMENT CENTER
PO BOX 1000
OAKLAND CA 94649-0001

Please Pay This Amount Now Due

145.86

342398000014000014586000000000009



EBMUD 1-866-40-EBMUD

YOUR ACCOUNT NO. IS: 34239800001

Next Read Date is 04/10/2018

Your Payment is Due by 02/28/2018

Working for you, 24/7. Whether you're at work or home, asleep or burning the midnight oil, EBMUD employees are always working for you. Meet our staff at ebmud.com/onthejob. And remember, if you're having trouble paying your bill, we can help. Just call us at 866-40-EBMUD.

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- [Rates & Charges](#)
- [Contact Info](#)


 Oakland Unified School District FSCP
 Attn:Mailroom/AP-Norman Hazzard
 900 HIGH ST
 OAKLAND, CA 94601-4405

Bill Date: 02/13/18
 Billing Period
 From To
 12/7/17 2/6/18

For: 746 Grand Ave
Irrigation Use Only

AMOUNT TOTAL

PREVIOUS CHARGES AND CREDITS

PREVIOUS AMOUNT DUE	145.86	
FULL PAYMENT - 01/05/18	-145.86	0.00

WATER CHARGES - EBMUD

WATER SERVICE CHARGE	68.26	
WATER FLOW CHARGE 17 UNITS @4.85	82.45	150.71

PLEASE SEE REVERSE SIDE FOR BILLING EXPLANATION

Please Pay This Amount Now Due

150.71

METER SIZE	ELEV. Band	METER READINGS		UNITS	CONSUMPTION INFORMATION		
		Current	Previous		Gallons	Days	Gal/Day
1 inch	1	99	82	17	12,716	61	208
		LAST	YEAR	2	1,496	62	24

PLEASE DETACH AND RETURN THIS PAYMENT STUB WITH CHECK OR MONEY ORDER PAYABLE TO EBMUD
 746 Grand Ave, Oakland, CA 946102714 12/7/17 2/6/18 ACCOUNT NO.: 34239800001
 7156

Pay by credit/ATM/e-check for a fee.
Call 1-888-963-0909

Mail payment to:

TOTAL PREVIOUS 0.00
TOTAL CURRENT 150.71

EBMUD PAYMENT CENTER
PO BOX 1000
OAKLAND CA 94649-0001

Please Pay This Amount Now Due

150.71

3423980000140000150710000000000008



EBMUD 1-866-40-EBMUD

YOUR ACCOUNT NO. IS: 34239900001

Next Read Date is 02/06/2018
Your Payment is Due by 12/28/2017

Every minute, EBMUD gathers and treats Sierra snowmelt and sends it through a complex system of pipes to every neighborhood in our service area. Want to find out how the water magic happens? Find out more at ebmud.com or request classroom materials at ebmud.com/teachers.

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- [View Newsletter](#)
- [Bill FAQs](#)
- [Rates & Charges](#)
- [Contact Info](#)


 Oakland Unified School District FSCP
 C/O Mailroom/AP Norman Hazzard
 900 HIGH ST
 OAKLAND, CA 94601-4405

Bill Date: 12/13/17
 Billing Period
 From To
 10/5/17 12/7/17

For: 746 Grand Ave
Schools

FS	AMOUNT	TOTAL
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PREVIOUS CHARGES AND CREDITS

PREVIOUS AMOUNT DUE	234.58	
FULL PAYMENT - 10/27/17	-234.58	0.00
WATER SERVICE CHARGE	234.58	
SEISMIC IMPROVEMENT PROGRAM SURCHARGE	0.00	234.58

PLEASE SEE REVERSE SIDE FOR BILLING EXPLANATION

Please Pay This Amount Now Due

234.58

METER SIZE	ELEV. Band	METER READINGS		UNITS	CONSUMPTION INFORMATION		
		Current	Previous		Gallons	Days	Gal/Day
4 inch	1	3	3	0	0	63	0
		LAST	YEAR	0	0	63	0

PLEASE DETACH AND RETURN THIS PAYMENT STUB WITH CHECK OR MONEY ORDER PAYABLE TO EBMUD
746 Grand Ave, Oakland, CA 946102714 10/5/17 12/7/17 ACCOUNT NO.: 34239900001

7154

Pay by credit/ATM/e-check for a fee.
Call 1-888-963-0909

Mail payment to:

TOTAL PREVIOUS	0.00
TOTAL CURRENT	234.58

EBMUD PAYMENT CENTER
PO BOX 1000
OAKLAND CA 94649-0001

Please Pay This Amount Now Due

234.58

342399000013000023458000000000005



EBMUD 1-866-40-EBMUD

YOUR ACCOUNT NO. IS: 34239900001

Next Read Date is 04/10/2018

Your Payment is Due by 02/28/2018

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And remember, if you're having trouble paying your bill, we can help.

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Oakland Unified School District FSCP
C/O Mailroom/AP Norman Hazzard
900 HIGH ST
OAKLAND, CA 94601-4405

Bill Date: 02/13/18

Billing Period

From To
12/7/17 2/6/18

For: 746 Grand Ave
Schools

FS AMOUNT TOTAL

PREVIOUS CHARGES AND CREDITS

PREVIOUS AMOUNT DUE	234.58	
FULL PAYMENT - 01/05/18	-234.58	0.00
WATER SERVICE CHARGE	234.58	
SEISMIC IMPROVEMENT PROGRAM SURCHARGE	0.00	234.58

PLEASE SEE REVERSE SIDE FOR BILLING EXPLANATION

Please Pay This Amount Now Due

234.58

METER SIZE	ELEV. Band	METER READINGS		UNITS	CONSUMPTION INFORMATION		
		Current	Previous		Gallons	Days	Gal/Day
4 inch	1	3	3	0	0	61	0
		LAST	YEAR	0	0	62	0

PLEASE DETACH AND RETURN THIS PAYMENT STUB WITH CHECK OR MONEY ORDER PAYABLE TO EBMUD
746 Grand Ave, Oakland, CA 946102714 12/7/17 2/6/18 ACCOUNT NO.: 34239900001

7155

Pay by credit/ATM/e-check for a fee.
Call 1-888-963-0909

Mail payment to:

TOTAL PREVIOUS 0.00
TOTAL CURRENT 234.58

EBMUD PAYMENT CENTER
PO BOX 1000
OAKLAND CA 94649-0001

Please Pay This Amount Now Due

234.58

3423990000130000234580000000000005

Coversheet

Discussion and Possible Action Regarding

Section: III. Action Items
Item: B. Discussion and Possible Action Regarding
Purpose: Vote
Submitted by:
Related Material: AIMS Board On Track Membership Agreement.pdf



March 21, 2018

Maya Woods-Cadiz
 American Indian Model Schools
 171 12th Street
 Oakland, CA 94607

BoardOnTrack Membership Letter of Agreement

This letter is to confirm your desire to move forward with a BoardOnTrack Membership to be used by **American Indian Model Schools** board.

Your success manager will be Melissa Danisch. Once this letter is authorized, Melissa will reach out to guide you through your onboarding process and kick off your membership.

Membership Terms and Fees

American Indian Model Schools' BoardOnTrack membership will start on March 22, 2018 and provides access to BoardOnTrack for one year. The annual fee for a BoardOnTrack membership is \$12,000.00. Payment is due in full upon receipt of invoice.

The membership renewal process begins with an invoice sent 90 days prior to renewal. Payment is due 30 days prior to your renewal date to ensure continuity of access.

Invoices are sent via email. Your invoice will be sent to **Maya Woods-Cadiz** at maya.woods-cadiz@aimschools.org.

Organization	American Indian Model Schools
Billing Address	171 12th Street Oakland, CA 94607
Billing Contact	Maya Woods-Cadiz
Billing Contact Email Address	maya.woods-cadiz@aimschools.org
Billing Contact Phone Number	510-893-8701 Ex. 16

Membership Authorization

By signing this agreement, American Indian Model Schools agrees to the terms as described above.

Thanks so much and welcome to BoardOnTrack!

Kyle McCarthy

Authorized Signature:

Maya Woods-Cadiz
 Superintendent



Coversheet

Discussion and Possible Action Regarding

Section: III. Action Items
Item: C. Discussion and Possible Action Regarding
Purpose: Vote
Submitted by:
Related Material:
RFP Insurance Broker.docx
Charter Safe Bid.zip
Response to American Indian Model Schools RFP for Insurance Broker (04-16-18).pdf



American Indian Model Schools

171 12th Street
Oakland, CA 94607-4900
510.893.8701
www.aimschools.org

REQUEST FOR PROPOSAL
FOR AN INSURANCE BROKER

MARCH 20, 2018

American Indian Model School (AIMS) is a public charter school within the Oakland Unified School District serving student from grade K-12. The school operates two (2) elementary schools and one (1) high school. The school operates under a Board of Directors who have authority over the governance of the schools.

American Indian Model School (AIMS) is requesting proposals from qualified proposers to serve as an Insurance Broker for their three (3) charter schools consisting of American Indian Public Charter School, American Indian Public Charter School II, and American Indian Public High School.

Proposals are due no later than 4:00 P.M. Pacific Time, Monday, April 16, 2018 to the Finance Office, American Indian Model School, 171 12th Street, Oakland, CA 94607. Proposals will be accepted by electronic media to the email address: finance@aimschools.org.

Proposer also certifies the it does not discriminate against any employee or applicant for employment on the grounds of race, age, color, national origin, religion, sex, gender, disability, genetic information, or any other classification protected by federal, California state constitutional, or statutory law; and does not and will not maintain or provide its employees any segregated facilities at any of its establishments.

American Indian Model School offers educational and employment opportunities without regard to race, age, color, national origin, religion, sex, gender, disability or genetic information.

American Indian Model Schools
171 12th St. Oakland, CA 94607
510.893.8701 www.aimschools.org

COMPANY NAME

ADDRESS			PHONE	FAX
CITY	STATE	ZIP	E-MAIL ADDRESS	
Names and signatures below certify that you understand and agree to all information in this Request for Proposal.				
AUTHORIZED REPRESENTATIVE (Print)			Signature	Date

GENERAL CONDITIONS:

1. Proposals are due to the Finance Office, American Indian Model School, 171 12th Street, Oakland, CA 94607 no later than 4:00 P.M., Pacific Time, Monday, April 16th, 2018.
2. Initial contract period will run July 1, 2018 to June 31, 2019 with the option to extend annually for up to four (4) additional consecutive one (1) year periods if agreeable to all parties.
3. Proposals should provide a straightforward and concise presentation, adequate to satisfy the requirements of the Request for Proposal (RFP). Emphasis should be on completeness, clarity of contents and responsiveness to the RFP. Proposals should be structured to respond to the RFP specifications. Format of Request for Proposal response should be as follows:
 - a. Executive summary, company organization, primary contact for this proposal.
 - b. Provide a brief description of the history and organization of the firm and of any proposed subcontractor.
 - c. Describe your firm’s internal organization and the way Services will be furnished. Provide an example of the structure of servicing a current account like American Indian Model School.
 - d. Must be licensed in the State of California. Copies of business licenses, professional certifications or other credentials, together with evidence that the firm and its principals are in good standing and qualified to conduct business in California. Proof of Errors and Omissions coverage is required.
 - e. Minimum of five (5) years in business as a firm.
 - f. Company background and qualifications referenced: Five (5) clients from whom you have currently provided comparable services for K-12 or higher education within the last two (2) to three (3) years. Please include contact name, address, telephone number, and email address.
 - g. A qualified principal with five (5) years’ experience in commercial lines insurance brokerage in California.
 - h. Experience providing insurance brokerage services to Government entities in California.
 - i. Safety and Loss Control experience
 - j. Identify the account team structure your firm would use with American Indian Model school. List the names of the proposed account service team and describe each member’s service role. Include at least two qualified individuals from your firm having a minimum of five years’ experience. Provide the Number of full time employees.

American Indian Model Schools
 171 12th St. Oakland, CA 94607
 510.893.8701 www.aimschools.org

- k. Describe the steps you would take in reviewing the School's current insurance program and designing changes to the program. Include specific techniques and procedures your firm may use to assist in identifying current and anticipated new exposures to loss.
 - l. A detailed cost proposal, including any travel costs and other expenses. As the School may award a contract based on the initial offer, the initial offer should be made on the most favorable terms available. Include broker service compensation on the basis of, one (1) fee for service or two (2) commission. If compensation is commission based, provide detailed commission structure in the proposal.
 - m. Emergency contact. 24-Hour Emergency Name and Telephone Number.
 - n. Must have an A.M. Best Rating of A- or better. If not A.M. Best, then a copy of most recent financial statement filed with the California Department of Insurance. It should include the most recent year's annual reports, or comparable document, including detailed current profit and loss, assets and liabilities, and other relevant data.
 - o. Proposal plan.
 - p. Support services and training. Provide the company name, address, telephone number, fax number and E-mail address of the branch that will directly serve the school.
 - q. Fee schedule
 - r. Completed and Signed Certificate of Non-Discrimination Form
 - s. Completed and Signed Request for Proposal Agreement
 - t. Exceptions
4. Insurance coverage for this request includes:
- a. Commercial Property and Liability
 - b. Umbrella/Excess Liability
 - c. General Liability
 - d. Commercial Crime
 - e. Automobile
 - f. Directors and Officers Legal Liability
 - g. Student Accident Liability
 - h. Volunteers Liability
 - i. Worker's Compensation
 - j. Employment Practices Liability
5. The Proposal should reflect a Comprehensive package for all the insurance coverage required and requested.
6. Proposer to submit five (5) complete hardcopy sets (original and 4 copies). Time, date and name of RFP must be clearly marked on face of sealed envelope. All price quotations and related materials must be in a sealed envelope.
7. Estimated proposal timing:
- | | |
|---------------------------|----------------|
| a. RFP Issued | March 20, 2018 |
| b. Deadline for Questions | April 15, 2018 |
| c. RFP Due | April 16, 2018 |
| d. RFP Evaluation Begins | April 16, 2018 |
| e. Presentations | April 17, 2018 |

- f. Board Approval April 17, 2018
 - g. Implementation April 18, 2018
8. The proposals will be evaluated, and a vendor selected using the following criteria:
- a. Project Plan
 - b. Firm Experience, Qualifications, and Personnel
 - c. Cost
 - d. References related to K-12 Schools

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

Charter Safe Bid.zip



RESPONSE TO REQUEST FOR PROPOSAL (RFP) FOR

Insurance Broker for American Indian Model Schools

April 16, 2018



PRESENTED BY

ALLIANT INSURANCE SERVICES, INC.

1301 Dove Street, Suite 200, Newport Beach, CA 92660 | (949) 756-0271 | www.alliant.com

Insurance License No. 0C36861



April 16, 2018

American Indian Model Schools
Attn: Susan Schickman
171 12th Street
Oakland, CA 94607
Via email finance@aimschools.org.

Response to Request for Proposal for Insurance Broker

Dear Ms. Schickman,

Alliant Insurance Services, Inc. (Alliant) would like to thank you for the opportunity to provide our qualifications to American Indian Model Schools (AIMS). We believe Alliant is uniquely qualified to assist AIMS with your Risk Management and Insurance program.

If you need any clarification about this response, or have other questions for us, we would be happy to respond. Otherwise, we hope to demonstrate our skills to you in practice.

Best regards,

A handwritten signature in black ink, appearing to read "Tom Boobar", is written over a light blue horizontal line.

Tom Boobar
First Vice President – K-12 Education Practice Leader
tom.boobar@alliant.com
(949) 260-5096 (Office)
(818) 371-9000 (Cell)

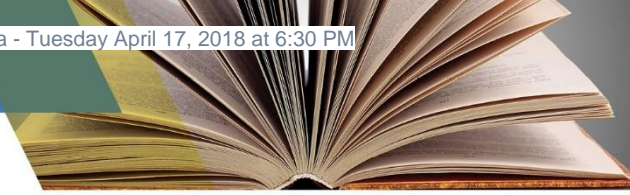
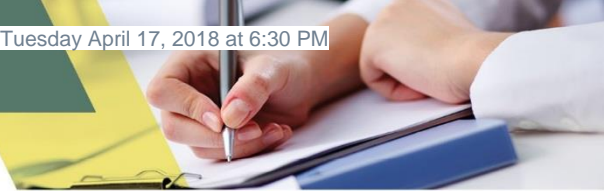


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E. Required Forms	



REQUEST FOR PROPOSAL RESPONSE

a. *Executive summary, company organization, primary contact for this proposal.*

Alliant is a full service insurance brokerage firm with the ability, resources and desire to be AIMS's partner in meeting its insurance and risk management objectives. We have grown to become California's leading broker for schools due to a culture that emphasizes a passion for expertise, creativity, and customer service.

Our goal is to take a consultative approach in delivering the services you need to protect your school community. We commit to spend the necessary time with your staff to gain a meaningful understanding of your existing operations and programs, and what you desire for the future. Next, we commit to applying what we know and have learned to design a service plan, underwriting specifications, and a coverage structure that achieves your coverage goals. Finally, we commit to providing the risk management consultative services to support and enhance your risk management efforts.

With this approach, the wealth of our education section expertise, and our strong relationships with school insurers, we can deliver superior results for AIMS. Key features of our education practice are as follows:

- **Education Specialists:** Over the past 30 years, Alliant has developed custom insurance and risk management programs for our school clients. We provide brokerage services for the largest and most complex educational institutions in the country which includes private, public, and higher education school networks in various states. Our service team will apply this experience to the benefit of AIMS. Our education team prides itself not only in its expertise, but in its 24/7 responsiveness.
- **Risk Manager and School Broker:** Alliant is qualified to consult as AIMS's Risk Manager and provides support to 950 charter schools on a national basis including 30 other states. We will provide onsite Risk Assessment visits conducted by your assigned Team Leader and broker Tom Boobar, a Certified Safety Professional with 27 years of experience. The visits will be consultative and interactive designed to work closely with staff onsite to discuss all potential risks facing your school.
- **Fully Insured Program with AM Best "A" rated insurance carriers:** Our program will only place AIMS's with AM Best A-rated and fully insured insurance carriers with significant asset size. The coverage we place for AIMS will have no potential for future premium assessments, no joint purchase or sharing of risk with other smaller charter schools, and allow AIMS to develop an experience modification and take ownership of customized loss control efforts.
- **Defined Client Service and Marketing Process:** We center our service activities on a *Defined Client Service and Marketing Process*. This process is designed to provide consistency in quality service, and provides checkpoints and timelines for monitoring our jointly agreed upon service standards.

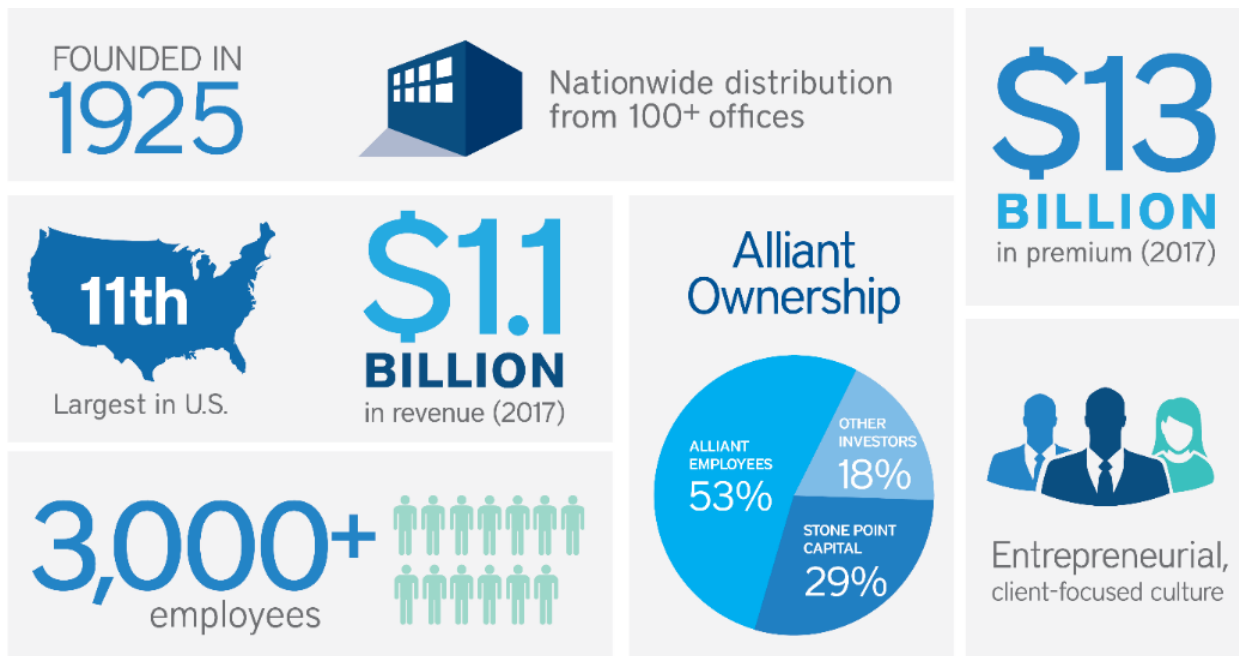
REQUEST FOR PROPOSAL RESPONSE

- **Choice of Counsel:** Our aforementioned program provides Choice of Counsel for general, professional school board, educators legal, and employment practices liability. Our program carriers believe in working with counsel closest to AIMS to resolve claims as quickly as possible.
- **Protect and Manage Risk for AIMS's Extracurricular Activities:** Alliant's school safety team will help manage AIMS's risk for student foreign travel, field trips, sports programs, arts and music, clubs and other school organizations.
- **Technology and Online Communication:** AIMS will have access to *AlliantConnect*, which is our web-based or "App" portal system that offers secure 24 hour access to your insurance information. It is especially useful for maintenance of all policy data and large document sharing. This portal provides seamless integration with our OASYS Net property system and CSR 24 certificate tracking system.
- **Help Manage Transportation Risk and implement a Premise Use Special Events program:** We will assist by proactively reviewing current transportation policies, help understand insurance and risk implications, and closely monitor special event risk to be sure AIMS is covered appropriately. Our special events program is operated by a dedicated team member who will help AIMS with all associated risks. We can conduct in service training to AIMS personnel to ensure your practices remain current and consistent with your peer schools.

REQUEST FOR PROPOSAL RESPONSE

b. Provide a brief description of the history and organization of the firm and of any proposed subcontractor.

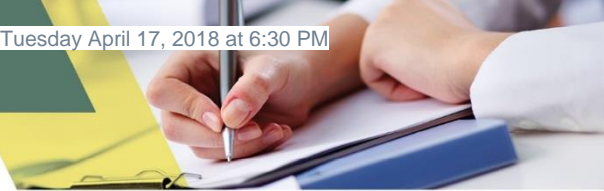
Alliant was established in 1925 in San Diego, California as the Robert F. Driver Company. Today, it is a privately held corporation headquartered in Newport Beach, California. As a firm, we are the largest specialty insurance broker in the country, with our focus devoted to selected industry segments including public entity, education, construction, real estate, healthcare, tribal nations, hospitality, non-profits, and legal professionals. *Business Insurance* ranks Alliant as the second largest privately held broker.



Primary contact: **Tom Boobar MBA, MS, CSP**
First Vice President
D (949) 260-5096
M (818) 371-9000
E tom.boobar@alliant.com

c. Describe your firm's internal organization and the way Services will be furnished. Provide an example of the structure of servicing a current account like American Indian Model School.

Our education team works throughout California in twenty-two offices. Our day to day teams assigned to AIMS would be:



REQUEST FOR PROPOSAL RESPONSE

Primary: 1301 Dove Street, Suite 200 Newport Beach, CA 92660; Total employees at this location: 246
Secondary: 100 Pine St. 11th Floor, San Francisco, CA 94111; Total employees at this location: 100

Local Capabilities: The Alliant offices in Newport Beach and San Francisco have full service risk consulting and insurance brokerage capabilities with many professionals dedicated to providing a complete range of insurance related services to the educational sector. The Newport Beach office tends to cater more to K-12 clients, and San Francisco more toward higher education clients, but both offices do both.

The three most important responsibilities of a broker include:

- Professional commitment to providing a superior insurance and risk management service and help AIMS avoid surprises with 24/7 availability and personalized approach.
- Complete disclosure and transparency in compensation.
- Execution and delivery of our product on a timely basis.

We take the servicing of our accounts very seriously. Our step by step servicing model discussed in the Description of renewal processes later in the RFP response, the ***Defined Client Service and Marketing Approach***, coupled with an in depth six (6) part Risk Identification Plan, will ensure the high quality of service we provide to our school clients. Both of these resources will be facilitated on behalf of AIMS. These processes allow us to bring the most technologically advanced products and methodologies while implementing them in such a way that meets and hopefully exceeds your servicing expectations.

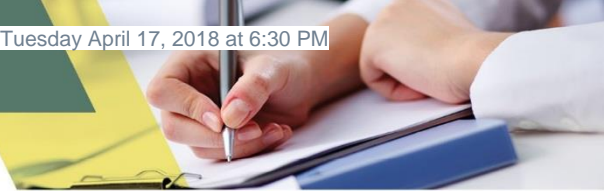
A critical piece of the interaction we will have with your team is the feedback we will get from you as we perform the activities that comprise our service plan. This section outlines the ways in which we evaluate our performance, time management, as well as your needs and level of satisfaction. To illustrate our attention to detail regarding the servicing of our clients, we have provided below an excerpt from our Service Standards Guidelines that outlines our service delivery guidelines:

Activity/Key Deliverable	Delivery Timeframe
Request for contractual insurance requirements	Acknowledged within 24 hours of receipt of request. Completion date will be as agreed between AIMS and Alliant.
Phone Calls Returned	Phone call received in the morning returned in the morning. Calls received in the afternoon returned in the afternoon.
E-mail Returned	Review regularly (morning and afternoon) and respond within 24 hours to acknowledge receipt.
Summons & Complaints	Upon receipt or prior to end of business day.



REQUEST FOR PROPOSAL RESPONSE

Activity/Key Deliverable	Delivery Timeframe
Claim First Report to Carrier	Immediate or no later than prior to end of business, even if complete data is not available.
Claim follow up with Carrier & Client	Within 24 hours of first report of loss.
Open Activities & Suspense	Daily.
Pre-Renewal Letters to Client	120 days prior to expiration.
Renewal Business Applications to Market	90 days prior to expiration.
Binders	Same day coverage is bound with approval. If wholesale broker used, we will advise client with written confirmation of coverage.
Binders	Same day coverage is bound with approval. If wholesale broker issued, advise client written confirmation of coverage is on its way.
Agency Bill Binder Billing	No later than the inception date of coverage.
Certificates	Within 24 hours of receipt on a normal schedule and within 8 hours on a rush schedule.
Policy reviewed for accuracy	Within 10 days from receipt from carrier.
Policy delivered to client	Within 10 days from receipt from carrier and within 90 calendar days of their effective date.
Agency Bill Additional and Return Premium Endorsements	Within 5 days of receipt into the agency.
Claims Review with Client	60 days prior to expiration, including any prior year with open losses.
Claims History and Loss Runs	Annually or any time upon request.
Semi-Annual Stewardship Report	Two weeks after the end of each 6 month calendar year period.
Audit review and processing	Within 48 hours of receipt.
Contract Costs Statement	Annually.
Premium Rates/Commission Rates (per market per layer)	Within 30 calendar days of binding.
State of the Market	Annually, or as requested.



REQUEST FOR PROPOSAL RESPONSE

Meetings/Reports to Management

Built within our standard service plan are regularly scheduled meetings and/or reports that allow opportunities to review our progress on a regular basis. These include:

- **Monthly Open Items Meetings** – A key objective for AIMS and the Alliant team is to ask if there are any service issues and to determine the most important items that need to be completed. Our Open Items Report is updated to reflect these issues and your Alliant team will take whatever corrective actions need to be undertaken, if any.
- **Annual Renewal Strategy and Stewardship Meetings** – Our strategy meetings, whether they are formal or informal, also allow us to ask how we are meeting AIMS expectations and determine what service corrections, if any, need to be taken.

d. Must be licensed in the State of California. Copies of business licenses, professional certifications or other credentials, together with evidence that the firm and its principals are in good standing and qualified to conduct business in California. Proof of Errors and Omissions coverage is required.

Alliant’s State of California license and good standing have been included in **Appendix A**. A copy of Alliant’s Errors and Omissions certificate of insurance is included in **Appendix B**.

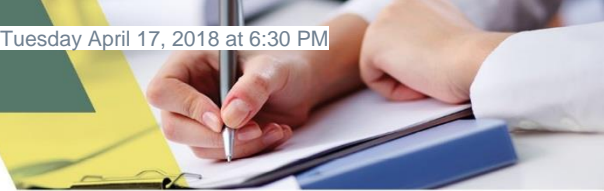
e. Minimum of five (5) years in business as a firm.

Alliant has been in business since 1925, see above answers to items “a” and “b”.

f. Company background and qualifications referenced: Five (5) clients from whom you have currently provided comparable services for K-12 or higher education within the last two (2) to three (3) years. Please include contact name, address, telephone number, and email address.

Alliance College Ready Public Schools – 15,000 + Students, 1500 Employees

Contact:	Cynthia Leonard, Vice President of Operations
Broker:	Tom Boobar
Phone:	(213) 604-5024
Address:	601 South Figueroa Street, Los Angeles, CA 90017
E-Mail:	cleonard@laalliance.org
Line(s) of coverage:	Package, Workers Compensation, Umbrella, Crime, Cyber, Student Accident, Builders Risk



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KIPP Bay Area Schools – 5,000 + Students, 500 Employees

Contact:	Ruchi Thiru, Managing Director of Operations and Information
Broker:	Tom Boobar
Phone:	(415) 548-1536
Address:	1404 Franklin St #500, Oakland, CA 94612
E-Mail:	ruchi.thiru@kippbayarea.org
Line(s) of coverage:	Package, Workers Compensation, Umbrella, Crime, Cyber, Student Accident, Builders Risk

*Note: Alliant’s clients include a National program for all 200+ KIPP Schools

Achievement First Inc. located in NY, CT, RI –13,000+ Students, 1900 Employees

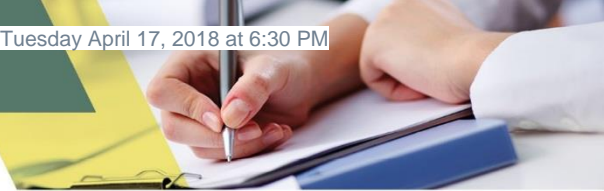
Contact:	Pete Cymrot, General Counsel
Broker:	Tom Boobar
Phone:	(917) 435-7012
Address:	335 Adams Street, Suite 700, Brooklyn NY 11201
E-Mail:	petercymrot@achievementfirst.org
Line(s) of coverage:	Package, Workers Compensation, Umbrella, Crime, Cyber, Student Accident, Builders Risk

New Education for the Workplace – Schools in Multiple States 2,000 + Students, 200 Employees

Contact:	Larrie Hall, Executive Operations Officer
Broker:	Tom Boobar
Phone:	(760) 631-7538
Address:	2611 Temple Heights Drive, Oceanside, CA 92056
E-Mail:	larrie.hall@siatech.org
Line(s) of coverage:	Package, Workers Compensation, Umbrella, Crime, Cyber, Student Accident

Los Angeles Unified School District – 640,000 Students

Contact:	Robert Reider, Director of Risk Management
Broker:	Daniel Howell
Phone:	(213) 241-1843
E-Mail:	robert.reider@lausd.net
Line(s) of coverage:	Property, Liability, Boiler & Machinery, Crime, Travel Accident



REQUEST FOR PROPOSAL RESPONSE

g. A qualified principal with five (5) years' experience in commercial lines insurance brokerage in California.

See Tom Boobar's qualifications in Resume which include 27 years of Risk Management and Insurance experience.

h. Experience providing insurance brokerage services to Government entities in California.

Over the past 30 years, Alliant has developed custom insurance and risk management solutions for our clients. We provide services to over 6000 public entity clients and School Programs in over 43 states, many with significant catastrophe exposures. Schools represent approximately 20% of our clientele with over 1000 across the United States. We are the broker for three of the five largest public school districts in California and the broker for the Los Angeles County Office of Education. Our education team in Newport Beach works exclusively with K-12 charter schools in California and nationally similar to AIMS.

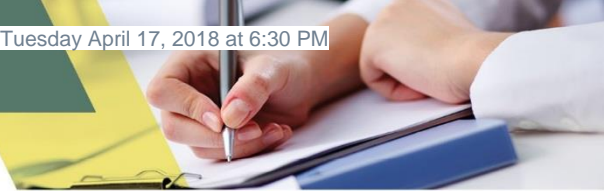
Alliant has significant expertise in assessing our school clients' insurance exposures and at least annually recommends program design improvements as either the insurance market or the clients exposures evolve. Our school brokerage specialists have many years of experience placing some of the most complex and diverse educational risks in the global insurance marketplace. We place coverage for smaller community based charter schools such as Vista Oaks in Lodi California, to the largest school districts in the state, Los Angeles Unified School District, as well as, the California State University Risk Management Authority, and several California community colleges. We know schools and understand the unique exposures that you face.

i. Safety and Loss Control experience.

We strongly believe all Risk Control services provided to our clients should be focused on its needs and not focused primarily on the needs of the insurance company. There can be tremendous benefit from Risk Control services tailored to each client's exposures, needs, and culture. We believe a collaborative risk management approach that includes the client, broker, underwriter, and Risk Control representative is the best solution to addressing your needs. Our Risk Control services will be focused on identifying and reducing exposures and will be part of an overall risk management program strategy.

Access to Safeschools.com	Risk Control Hotline & Alerts	Smart Phone Emergency Preparedness Application
Risk Control Webinars	Newsletters	Fact Sheets

We have listed below various Risk Control services which will be made available to AIMS if selected as your partner broker.



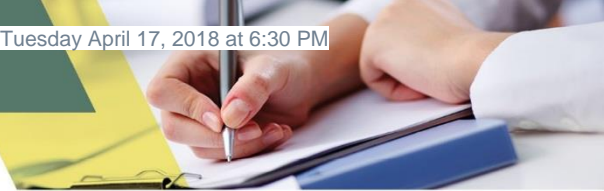
REQUEST FOR PROPOSAL RESPONSE

Special Events Risk Management – When your organization is planning a special event it is time to consider what can go wrong and what harm can come to your assets – the people, income, reputation, and goodwill of the organization. This session will help your organization be ready to deal with unexpected large crowds, guests that out-stay their welcome, unpredictable weather, alcohol/food service, onsite volunteers, permits, and contracts with vendors, certificates of insurance, security details, and parking.

- Property Risk Control Surveys
- Risk Assessment Surveys
- Fire Investigation and Root Cause Analysis
- Property Loss Control Training
- Safety Training
- Compliance and Quality Assurance reviews
- First Aid/CPR/AED Training
- Office Ergonomics
- Industrial Hygiene Services
- Air Sampling Hearing Conservation
- ADA Assessments
- OSHA Compliance
- Safety Program Review
- Lockout-Tagout & Hazardous Energy
- Bloodborne Pathogens Plan
- Confined Space Entry
- Respiratory Protection Program
- Construction Safety
- Contractor Selection & Control
- Return-to-Work & Transitional Duty
- Powered Industrial Lifts
- Hazard Communication
- Workers' Compensation Claims Administration

Customized Webinars – As an Alliant client, AIMS will have access to our extensive webinar library as well as upcoming webinars. Our webinars are developed and presented by both Alliant staff members and third party experts. In addition to site inspections, and onsite training, we have crafted unique services geared towards institutional buyers of property insurance. These services include web-based safety training “webinars” with a property focus. They are free of charge and offered on a monthly basis. Below is a sample of property related webinars that we have presented in the past. These are available to “play back” on-line at any time:

- Modeling Catastrophic Exposures and Calculating Probable Maximum Loss
- Secondary Characteristics for Wind and Earthquake Modeling



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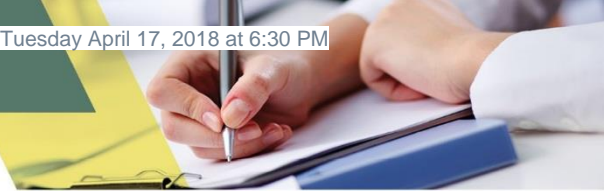
- Incident Investigation and Root Cause Analysis
- Identifying and Managing Electrical Hazards
- Preventing and Responding to Flood and Water Damage
- Lessons learned from Earthquakes
- Beyond Disaster Recovery: IT and Business Recovery
- Understanding Catastrophic Exposures
- Using Infrared Surveys in Property Loss Control
- Preparing for a Pandemic or Other Catastrophic Event
- Life Safety for School Facilities
- How to Reduce the Impact of Fraud on Your Organization

Menu of General K-12 Loss Control Services Available:

1. Safety Management Organization and Orientation
2. Safety Integration/Behavior Based Safety
3. Special Education Loss Control
4. Safety Process Measurement
5. Safety, Profitability, and Organizational Efficiency
6. OSHA Regulations and Inspection Handling and Appeals

Online Training – Alliant offers the following on-line K-12 specific training courses from our online training provider SafeSchools.

- Mandatory Reporting Course (for Child Abuse Cases)
- Active Shooter for Administrators and School Staff
- Reasonable Suspicion Course
- Food Service Safety Course
- Blood Borne Pathogen - Universal Precautions Course
- Sports Facility Safety Course (Inspection & Maintenance-using customized checklists available in English and Spanish)
- CPR Course (all but the hands-on practice is included)
- First Aid for Playground Safety Course
- New Hire Orientation Course (can be adapted for member district specific requirements)
- Slips, Trips, & Falls Course
- Lifting Back Injury Prevention Course
- Sexual Harassment Course (Student Behavior Response)
- School Violence Preparedness Course (Dealing with Weapons)
- School Safety Behavior (Bullying, Predators, Intruders, & Cyber Issues)
- Conflict Management Course



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- General Health Awareness Course (Diabetes, Allergies, Seizures, & Asthma)
- Ergonomics Course
- General School Safety Course
- Transportation Safety for Children with Special Needs

The Responsiveness of our Loss Control Department

We currently operate a K-12 risk management Solution Center for other schools and typically provide answers to client questions and requests for assistance before the close of the same business day or no later than the next business day. We would provide at least this level of responsiveness to AIMS's requests, and strive to exceed AIMS's expectations for service.

Quality is Integral

Fundamental to our operations is that quality is an integral component of our business model. It pervades all aspects of our work culture and our delivery of value-added services. Our commitment to quality is an active work process that includes:

- Maintaining standard operating procedures for critical work processes.
- Requiring that all work products undergo a technical peer review by a senior technical expert.
- Having document deliverables reviewed by a technical editor prior to release to clients.
- Requiring consultants to attend annual professional development programs in order to maintain their technical competence.
- During the hiring process, performing criminal background checks as well as verifying education and personal references.
- Requiring new employees to qualify in areas of practice through a technical mentoring program prior to being allowed to deliver such services to clients.

Having senior managers audit the project files of consultants to ensure project documentation meets internal recordkeeping standards.

Continuing our commitment to risk management technology for AIMS, we will work with AIMS to develop a tailored Risk Control plan from the onset of our relationship. One example of other risk management services vital to AIMS's goal of keeping students, staff, and community members' safe each day is risk control services for Emergency Preparedness.

Emergency Preparedness

Most emergency plans are not in the hands of who needs it when a crisis occurs. Schools typically have a comprehensive Emergency Plan, although very few employees have it handy when an actual crisis occurs. As a result, individuals often panic and respond in a manner that jeopardizes the safety of themselves and others.

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Our Emergency App can be downloaded to any iOS, Android or Amazon device. The App has the flexibility to deliver plans that are 100% customized by:

- Location
- Situation
- Audience
- Policy
- Expertise



Emergency procedures and instructions are easily managed by via an online dashboard and pushed in real time to smart-phones and tablets.

Authorized administrators have the ability to modify plans, send push notifications, create security passwords, control users and delete plans.

Every Emergency Mobile App includes:

- Convenient access to emergency information with features such as diagrams, one-tap calling, push notifications, maps and more.
- Replacement of traditional paper-based flip-charts, laminated wallet cards or lengthy standard operating procedures.
- Improved efficiency by aligning event-specific information with contacts.
- Unlimited updates, Unlimited users, Unlimited update notifications, Unlimited downloads.
- Secure cloud storage of plan.
- Printable plans.
- Peace of mind knowing your organization’s emergency information is within an arm’s reach.

Plan Image	Plan Type	Plan Name	Version	Published	Last Activity	Statistics
	Custom	BAA Member Office	07	7/9/16	05/05/2015 2:05 PM	47 pages 74 downloads 15.93 MB
	Custom	BAA Member Office	25	5/2/16	05/05/2015 11:30 AM	25 pages 58 downloads 11.93 MB
	Custom	ICOC Demo	27	1/9/16	07/05/2015 11:10 AM	3 pages 11 downloads 0.04 MB
	Custom	BAA Member Office	11	1/1/16	05/05/2015 2:05 PM	14 pages 45 downloads 0.04 MB
	Historical	Palmer Park	6	4/8/16	05/05/2015 2:05 PM	22 pages 11 downloads 0.04 MB

Plans to be Approved
 There are no plans available to be approved.
Full Emergency Administrators: Events Supervisor, Risk Management, Admin, Fund, Safety, Board

j. Identify the account team structure your firm would use with American Indian Model School. List the names of the proposed account service team and describe each member’s service role. Include at least two qualified individuals from your firm having a minimum of five years’ experience. Provide the Number of full time employees.

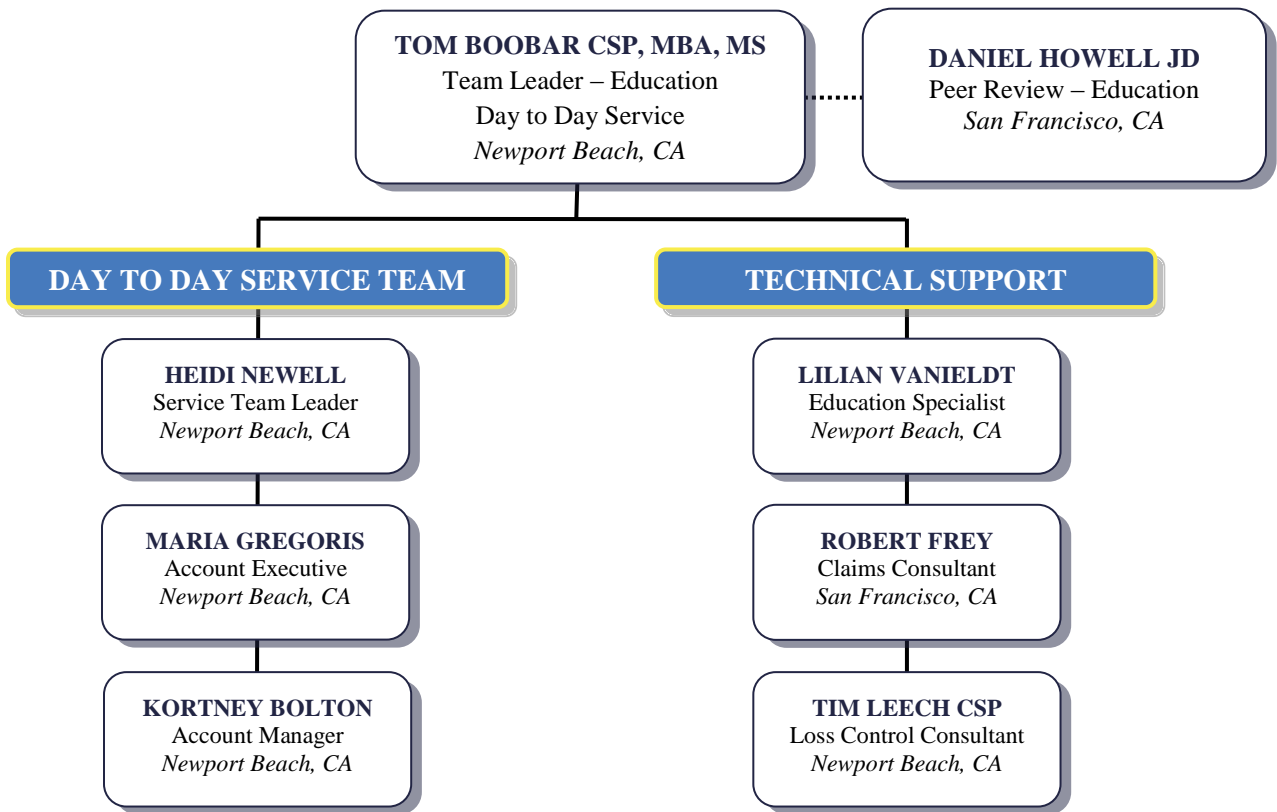
Alliant understands that selection and assignment of project staffing is critical to establishing the foundation of a long term, healthy partnership with our clients. Our proposed team is comprised of full-time Alliant employees and represents a wealth of school, construction, real estate and property specific insurance brokering and risk management experience. We identify each proposed team member below and a description of the services they would provide. (Note: Alliant has over 3,000 employees).

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Collectively, our team has worked with hundreds of schools and we bring to AIMS unparalleled knowledge of your unique exposures and the best way possible to address them. Included is a perspective derived from years of hands-on experience working with education entities of all sizes.

Please refer to **Appendix C** for complete resumes for all service team members.

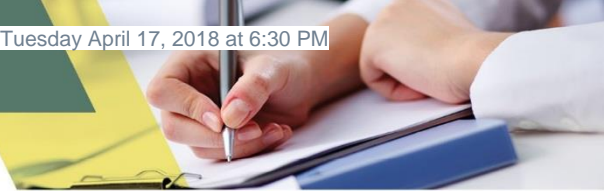
AIMS/Alliant Service Team



Tom Boobar CSP, MBA, MS, First Vice President | Team Leader (Day to Day Service)

Tom will be the principle Team Leader for AIMS. He will lead the service team and have overall responsibility for all services delivered, including the management of insurance placements, program timeline development, project deliverables, risk management services, and client communication.

Tom responsibilities will include the development of the marketing strategy and negotiations with insurance markets. He will have the overall responsibility for the design and implementation of AIMS’s insurance and risk management program. Tom will also provide Safety and Health Services as a licensed “Certified Safety Professional.” Tom will manage the insurance programs from the Newport Beach office with help from his service team. He will be responsible for ensuring that all questions are answered accurately and in a timely fashion.



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Tom is a licensed Fire and Casualty insurance broker in all 50 states and holds an active Certified Safety Professional license. Tom has a Bachelors and Masters of Science in Environmental Health and Safety (CA State University, Northridge) and a Masters of Business Administration with emphasis in Finance (Pepperdine University). Tom has 27 years of Risk Management and Safety experience with catastrophic onsite accident investigations and specific K-12 risk management work.

Daniel Howell, Sr. Executive Vice President | Peer Review

Daniel joined Alliant in 1998 and offers an extensive property and casualty background including many years guiding public entity and education clients. His expertise enables him to provide insightful understanding of issues and well-reasoned solutions to those issues. Daniel's education includes an A.B. in History from Stanford University, and a Juris Doctorate from UC Hastings College of Law. He also holds designations in good standing for both the Chartered Property Casualty Underwriter (CPCU) and the Associate in Risk Management (ARM-P) and is an active member of the California State Bar.

For AIMS, Daniel's role will be to serve as senior contact for peer review of Tom Boobar, including design and implementation of all programs. He will also be responsible for timely achievement of all deliverables and personally participate in strategic planning and execution.

Heidi Newell, Account Executive (Day to Day Service)

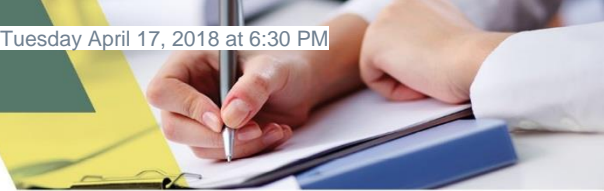
Heidi's responsibilities will be to assist Tom and any consultants in providing day-to-day quality administrative services, including insurance market specifications preparation, endorsement requests, policy reviews, policy summaries, assistance with excess reporting, claims interaction, and premium invoicing. Heidi is dedicated solely to managing school clients. Heidi will provide oversight to a service team of experienced professionals skilled at providing accurate policy review, prompt policy and certificate issuance and answers to coverage questions. Heidi will also act as AIMS's conduit when seeking services from Alliant's loss control division. Heidi has been in the insurance industry for over 20 years, with the past 10 years focused solely on program account management. Heidi is a licensed Fire and Casualty insurance broker.

Maria Gregoris, Assistant Vice President | Account Executive (Day to Day Service)

Maria's responsibilities will be to technical and administrative services, including such items as insurance carrier specification(s) preparation, certificates of insurance processing, endorsement requests, policy reviews, policy summaries, invoicing, and monthly bordereaux processing. Maria has been in the insurance industry for over 20 years, with the past 10 years focused solely on program account management for California school districts. Maria is a licensed Fire and Casualty insurance broker and has earned her Certified Schools Risk Manager (CSRSM) designation.

Kortney Bolton, Account Manager (Day to Day Service)

Kortney's responsibilities will be to assist Heidi and Maria with certificates of insurance processing, endorsement requests, policy reviews, policy summaries, invoicing, and monthly bordereaux processing.



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Lilian Vanvieldt, Senior Vice President | Education Specialist

Lilian will assist Tom as needed with direct placement of the insurance coverage. Lilian provides a comprehensive approach to risk financing and alternative risk analysis with emphasis on claims advocacy. In her role as schools team leader for Alliant, she brings a distinctive understanding of the risk exposures faced by large school programs. Her expertise includes developing, implementing, and managing programs throughout the United States.

Robert Frey, First Vice President | Claims Consultant

As head of the Specialty Group Claims department in Alliant's San Francisco office, Bob will be AIMS's primary contact for reporting claims and working with carriers on all claims. His most valuable role will be to act solely as a claim consultant and advocate on difficult and severe claims. Bob's role will be to complement and supplement your efforts in obtaining quick and equitable claims resolutions while acting as a claims resource. His responsibilities include ensuring the assistance of his dedicated claims staff, the initial reporting of claims to both primary and excess carriers, tracking the status of large open claims, and coordinating carrier claims meetings. Where necessary, Bob will be supported by senior professionals within our office who have substantial experience in helping our Specialty Group clients negotiate settlements on large, complex property and liability claims.

Tim Leech, First Vice President – Risk Control Consultant | Loss Control Consultant

With over 20 years' experience in loss control, safety and risk management, Tim will work with Tom Boobar as AIMS's dedicated loss control consultant. At Alliant, his role includes identifying loss trends, developing risk management solutions, and serving as a dedicated resource for AIMS.

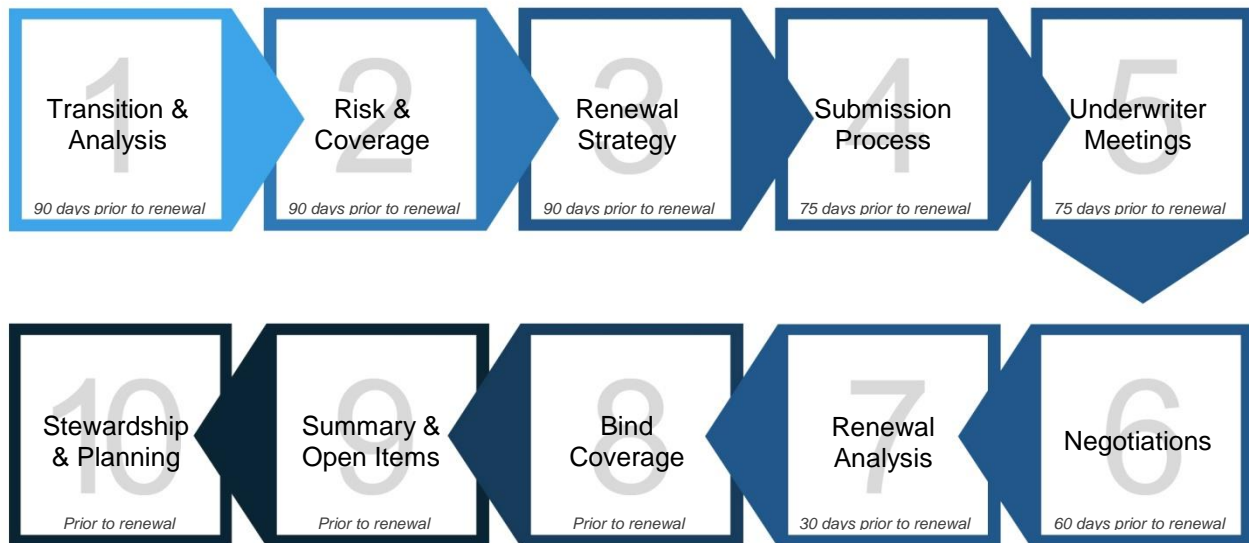
k. Describe the steps you would take in reviewing the School's current insurance program and designing changes to the program. Include specific techniques and procedures your firm may use to assist in identifying current and anticipated new exposures to loss.

Alliant is widely recognized as a leader in the education sector. As such, we have the experience and working knowledge of how best to access carriers that want to see education business. We identify preferred insurers by individual coverage requirements and several key elements, including market stability, financial strength, flexibility, and capacity.

Alliant's Defined Client Service and Marketing Process is the framework for our business approach and a technical practice implemented in a manner that aligns with AIMS's goals. This process has been developed through our years of experience and is fully customizable to suit each client's needs. The Alliant approach provides consistency in quality service, checkpoints, and timelines for monitoring our jointly agreed upon service standards, and ensures the appropriate planning occurs well in advance of the expiration date. In addition, we use Quality Committees to continuously monitor the implementation of these best practice standards.

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Purposefully, this process begins with transition planning, and includes an in-depth risk management analysis, in addition to service and marketing activities. What follows is an illustration of this process, with each step containing a detailed explanation along the way. As we base our proprietary Defined Client Service and Marketing Process on our “Risk on a Broader Perspective” philosophy, we are confident in saying that we know of no other broker that adheres to such a process as vigorously as Alliant.



1

TRANSITION PLAN/ANALYTICS & DIAGNOSTICS (90 days prior to renewal)

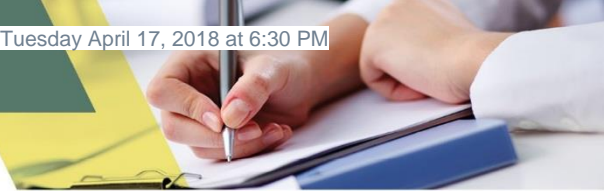
Once appointed as AIMS’s Broker of Record, we will begin to transition the work flow from your current broker(s) to Alliant. Given the absolute importance of a successful transition for each new Alliant client, we will employ the following steps during the implementation of the program to make the transition as seamless as possible for AIMS.

Step 1: Identify Appropriate Personnel and Discuss the Defined Service and Marketing Process

- Identify individuals who will be involved in the transition from Alliant and AIMS.
- Discuss Defined Service and Marketing Process and tailor it to AIMS’s unique needs.
- Facilitate dialogue between key personnel at Alliant and AIMS; including claims, loss prevention, accounting, board members, etc.

Step 2: Notify Carriers

- Alliant will prepare Broker of Record Letters (BORs) for AIMS and then file it with the appropriate carriers.
- Confirm acceptance of all BORs filed.



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Step 3: Information Gathering/Data Acquisition

- Financial statements
- Audits
- Actuarial studies
- Bylaws
- Claims data
- Corporate information
- Exposure data
- Draft submissions
- Exposure data
- Historical Policy Digest
- Policies/Summaries
- Schedules or other data elements

Step 4: Administrative

- Create Open Items Report.
- Further develop annual work plan to include all key stewardship tasks/dates/milestones.
- Develop protocol for execution of all key deliverables.
- Identify and plan for any other key administrative tasks as defined by AIMS.
- Provide laminated team charts/contact cards.
- Execute service agreement.

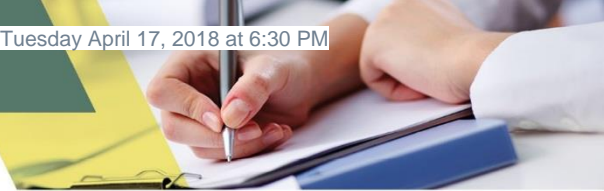
Step 5: Risk Identification

- Review all data accumulated from the information gathering/data acquisition process.
- Discuss with key operational personnel (operations, finance, legal, quality, risk, claims).
- Strategic discussions regarding mission, key AIMS initiatives, financial goals, short- and long-term operational and financial goals, unique financial issues, risk philosophy.
- Discuss unique claims or risk issues as defined by AIMS.

Step 6: Documentation and Implementation

- Prepare a summary report detailing the process, observations, and key findings.
- Review summary document and confirm findings.
- Develop renewal timeline in conjunction with the Annual Work Plan.

Our service team will coordinate these activities to help ease the administrative burden on AIMS. Our priority is to become intimately familiar with your overall insurance program and unique loss exposures. Therefore, we will get to know AIMS through a thorough review of your website, financial statements, and loss runs; an analysis of your policy language and coverage to determine the exact coverage being provided; personal discussions; and on-site visits. We will use our unique five-part Risk Identification Model to identify and analyze your unique loss exposures.



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2

RISK & COVERAGE PROFILE *(90 days prior to renewal)*

For coverage assigned to us, we will develop a Risk Profile unique to AIMS. We will compare this Risk Profile to your current insurance coverage to: determine any serious or unanticipated gaps that exist; review the retentions and insurance limits; and provide you with a written report outlining our observations and recommendations.

3

RENEWAL STRATEGY MEETING *(90 days prior to renewal)*

At least 90 days before your major renewal date(s), we will coordinate a Renewal Strategy Meeting to:

- Review our Risk and Coverage Analysis, the resultant Risk Profile and the adequacy of your current insurance portfolio.
- Update AIMS on the current insurance market.
- Discuss recent renewal results for similar clients.
- Provide an analysis of viable underwriter alternatives, their capacity, and deductible preferences.
- Obtain your thoughts on the desirability of any particular market, i.e., your past history with that carrier, the carrier's financial rating, etc.
- Provide renewal pricing ranges.
- Suggest a renewal timeline and renewal options.

Our goal is to provide you with a concise report outlining our mutually agreed upon game plan.

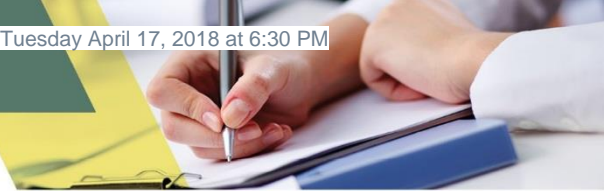
4

UNDERWRITING SUBMISSION & PRESENTATION *(75 days prior to renewal)*

The underwriting submissions we prepare are unrivaled in our industry. Our responsibility is to portray, with integrity, your unique Risk Profile for each line of coverage. Your underwriters will know that our submission will portray your unique risks and operations correctly, succinctly and in a clear and easily understandable format. We encourage meetings between you and the underwriters.

Our goal is to distinguish you from your peers and we do so by creating first class underwriting presentations that demonstrate your unique risk characteristics. We will help you structure the material and provide input and guidance on the graphic representation of your unique results, risks and operations.

The underwriting submission and the underwriter presentation will be available to the market at least 75 days prior to your renewal date.



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5

UNDERWRITER MEETINGS *(75 days prior to renewal)*

We will coordinate all underwriter meetings benefiting AIMS and our renewal strategy. Where possible, we will attempt to schedule these at your office.

6

NEGOTIATIONS *(60 days prior to renewal)*

To execute a successful renewal, we must focus on two key areas – market canvassing and the exploration of options. At our Renewal Strategy Meeting, we will have reviewed the listing of all possible market alternatives, solicited your input and agreed to those we want to approach. We will review alternative limit, retention and coverage structures. We will provide you with weekly renewal updates to keep you informed and to get your feedback and thoughts on the underwriters' responses.

7

RENEWAL PROPOSAL & ANALYSIS *(30 days prior to renewal)*

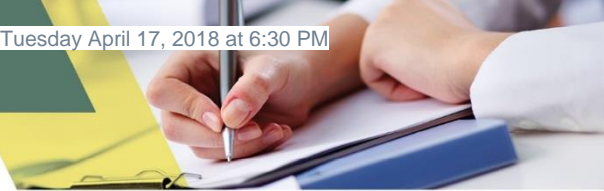
We are aware that while our clients want to have a bottom line comparison of all renewal alternatives, they also want to know the intricate details of each quotation. Therefore, our renewal proposals feature both an Executive Summary and a detailed Coverage Analysis section. Our analysis will help you make a more educated renewal decision.

8

BIND COVERAGE *(Prior to renewal)*

Once you have reviewed your renewal options and have selected an alternative, we will immediately process the following documents, all designed to be completed before your renewal date:

- Confirmations of Coverage
- Certificates of Insurance
- Premium Finance Agreements (if applicable)
- Claims Reporting Instructions
- Program Limits Charts



REQUEST FOR PROPOSAL RESPONSE

9

DESK REFERENCE & OPEN ITEMS REPORTS *(Prior to renewal)*

We will create a Desk Reference that will include insurance summaries of the coverage's bound, claims reporting instructions and contact information for your dedicated service team.

Our Monthly Open Items Reports and meetings are formalized events helping both of us and your underwriters to stay focused on unresolved items as well as, to discuss new risks or operational issues.

10

STEWARDSHIP REPORT/STRATEGIC PLANNING MEETING *(Prior to renewal)*

The Stewardship Report and Strategic Planning Meeting are designed to evaluate our performance, review the results of your renewal, discuss any new operations or acquisitions you are contemplating, identify new and emerging risks, update you on recent market conditions/trends, and plan our next renewal strategy meeting.

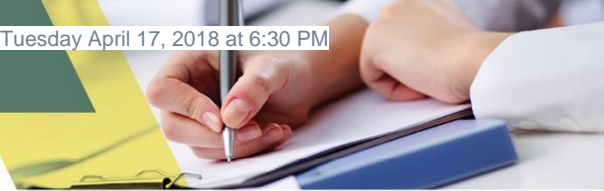
S

SUMMARY

Our Defined Client Service and Marketing Process has been designed to provide details specific activities related to transitioning your insurance to us. This strategic framework allows us to effectively market your renewal as we gain a better understanding of your coverage and risk exposures. Through this process, you will have an opportunity to evaluate our performance, from which we will collaborate on increasing the likelihood of favorable renewal outcomes for your organization.

Property & Casualty Benchmarking

We are equipped to prepare benchmarking studies for AIMS specific to your peer group K-12 schools. See *Appendix D* for an example. These benchmarks combine information from our database, information from our insurance carrier partners, and industry available information. Additionally, we have purchased access to national benchmarking data bases. We have found the client of the size and level of sophistication of AIMS often pursues benchmarking on their own. In these cases our team is happy to augment those studies with additional data and function as a supplement to those studies. Beyond the normal benchmarking comparison of retentions, limits, premium ratios, losses, program costs, and program structure, we often develop benchmarking studies on unique risk issues. Standard benchmarking studies are provided at no additional costs.



REQUEST FOR PROPOSAL RESPONSE

- l. A detailed cost proposal, including any travel costs and other expenses. As the School may award a contract based on the initial offer, the initial offer should be made on the most favorable terms available. Include broker service compensation on the basis of, one (1) fee for service or two (2) commission. If compensation is commission based, provide detailed commission structure in the proposal.*

Alliant supports full transparency and disclosure with regards to all aspects of compensation. **Alliant does not collect contingent income on any of our school placements.** Alliant does not own a wholesale broker and we typically utilize direct relationships for placing coverage. We only engage independent wholesale intermediaries when necessary to achieve the best result for our schools.

We would like to present options for consideration: **brokerage commission or brokerage flat fee.** Our proposed structure is inclusive of services outlined in the scope of work of this RFP. As requested we have listed our proposed structures.

1. Brokerage Commission: We will accept standard commissions included in carrier premiums which range from 10-17.5% by line of coverage for placement of coverage and all Risk Management Services described in this RFP response. No contingent commission is received.

- OR -

2. Brokerage Flat Fee: We are open to discussing a fee arrangement for service and net out all commissions from the insurance carriers. We typically base our fees on current premiums so we are willing to discuss this further with AIM's management and board (net of all commission, 0%).

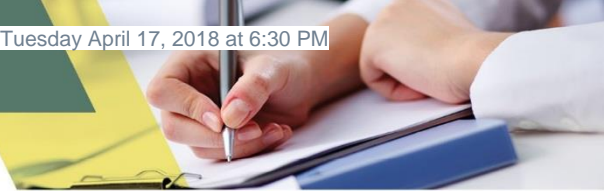
We do not want our proposed compensation to be seen as "rigid" and would emphasize that we are willing and agreeable to discuss a variety of compensation structures with commission, fee, performance based or a commission cap structure.

Note: Alliant is willing to put a significant portion of our compensation at risk. We are confident in our superior service delivery and would be interested in discussing a fee arrangement that would place a percentage (up to 25%) of our compensation at risk should we fail to meet pre-determine performance measures. These measures are agreed upon between parties and outline the required scope of services. We are graded on our ability to meet pre-set criteria, ranging from the frequency of contact to the delivery of certificates our any issue that you would choose to evaluate.

NOTE: all travel and other expenses would be included in the commission or broker fee options above.

- m. Emergency contact. 24-Hour Emergency Name and Telephone Number.*

Tom Boobar: 818-371-9000 (cell phone)



REQUEST FOR PROPOSAL RESPONSE

n. Must have an A.M. Best Rating of A- or better. If not A.M. Best, then a copy of most recent financial statement filed with the California Department of Insurance. It should include the most recent year's annual reports, or comparable document, including detailed current profit and loss, assets and liabilities, and other relevant data.

Alliant utilizes only fully insured AM best rated A- VII or better for placement of coverage for education clients. All insurance companies will provide financial statements and are vetted by AM Best rating standards.

o. Proposal plan.

Please refer to answer “k” for the Alliant’s Defined Client Service and Marketing Process.

p. Support services and training. Provide the company name, address, telephone number, fax number and E-mail address of the branch that will directly serve the school.

Our education team works throughout California in twenty-two offices. Our day to day teams assigned to AIM would be:

Primary: 1301 Dove Street, Suite 200 Newport Beach, CA 92660

Main Contact: Tom Boobar | (949) 260-5096 – Office | (949) 756-2713 - Fax | tom.boobar@alliant.com

Local Capabilities: The Alliant offices in Newport Beach have full service risk consulting and insurance brokerage capabilities with many professionals dedicated to providing a complete range of insurance related services to the educational sector.

q. Fee schedule.

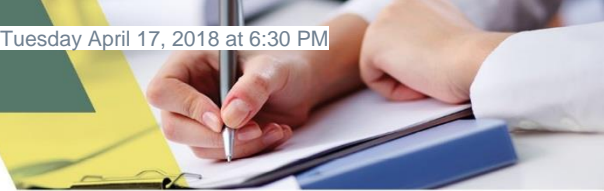
Please refer to answer “l” for compensation and fee schedule described in detail.

r. Completed and Signed Certificate of Non-Discrimination Form.

This form was not provided in the RFP. We can complete this upon request.

s. Completed and Signed Request for Proposal Agreement.

The completed Request for Proposal Agreement is included in **Appendix E**.



REQUEST FOR PROPOSAL RESPONSE

t. *Exceptions.*

Confirmed, None.

APPENDIX

- A. State of California License and Good Standing
- B. Errors and Omissions Certificate of Insurance
- C. Service Team Resumes
- D. Benchmarking Study Example
- E. Required Forms

APPENDIX

A. State of California License and Good Standing

Please refer to the following page(s).

California Department of Insurance

ALLIANT INSURANCE SERVICES, INC.

License # 0C36861

Pursuant to the requirements of the State of California Insurance Code,
ALLIANT INSURANCE SERVICES, INC. is authorized to act in the following capacity:

<u>License</u>	<u>Effective Date</u>	<u>Expiration Date</u>
Resident Insurance Producer	09/02/1998	09/30/2018
<u>Qualifications</u>		
Accident and Health Agent	09/02/1998	
Casualty Broker-Agent	09/02/1998	
Life-Only Agent	09/02/1998	
Property Broker-Agent	09/02/1998	
Special Lines Surplus Lines Broker	09/02/1998	
Surplus Lines Broker	09/02/1998	
Variable Contracts Agent	09/02/1998	

Business Address: 701 B Street, 6th Floor, San Diego, California 92101


Dave Jones, Insurance Commissioner



State of California
Secretary of State

CERTIFICATE OF STATUS

ENTITY NAME:

ALLIANT INSURANCE SERVICES, INC.

FILE NUMBER: C2028182
REGISTRATION DATE: 03/06/1998
TYPE: FOREIGN CORPORATION
JURISDICTION: DELAWARE
STATUS: ACTIVE (GOOD STANDING)

I, DEBRA BOWEN, Secretary of State of the State of California,
hereby certify:

The records of this office indicate the entity is qualified to
transact intrastate business in the State of California.

No information is available from this office regarding the financial
condition, business activities or practices of the entity.



IN WITNESS WHEREOF, I execute this certificate
and affix the Great Seal of the State of
California this day of May 23, 2013.

Debra Bowen

DEBRA BOWEN
Secretary of State

APPENDIX

B. Errors and Omissions Certificate of Insurance

Please refer to the following page(s).



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
12/06/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

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

PRODUCER New York- E.45th-Alliant Ins Svc Inc 140 East 45th St Ste 6B New York, NY 10017	CONTACT NAME: michele.rodriguez@alliant.com PHONE (A/C, No, Ext): _____ FAX (A/C, No): _____ E-MAIL ADDRESS: _____ INSURER(S) AFFORDING COVERAGE NAIC # INSURER A: AIG Specialty Insurance Company 26883 INSURER B: _____ INSURER C: _____ INSURER D: _____ INSURER E: _____ INSURER F: _____
INSURED Alliant Holdings, LP c/o Alliant Insurance Services, Inc. 1301 Dove St Ste 200 Newport Beach, CA 92660	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER: _____						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ _____ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ _____ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED _____ RETENTION \$ _____						EACH OCCURRENCE \$ AGGREGATE \$ _____ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y / <input type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Prof. Liability			03-406-33-93	12/15/2017	12/15/2018	Each Claim/Aggregate 10,000,000
A				03-406-33-93	12/15/2017	12/15/2018	Retention 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 This is a Claims Made Policy.

CERTIFICATE HOLDER <div style="text-align: center; padding: 20px;"> For Informational Purposes Only </div>	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
--	--

APPENDIX

C. Service Team Resumes

Please refer to the following page(s).

THOMAS BOOBAR

VICE PRESIDENT PUBLIC ENTITY GROUP



ACCOMPLISHMENTS AND AREAS OF EXPERTISE:

Tom recently joined Alliant Insurance Services team in 2014 as a Public Entity Broker and Joint Powers Authority (JPA) specialist. Tom's experience includes working as a risk management and insurance consultant with public school districts, charter, and private schools in 32 states. He helped launch a Joint Powers Authority pool which has grown to 500+ member locations and assisted in creating a national insurance program for schools throughout the country. He has been involved in the formation of a Risk Purchase Group and Captive involving manuscript coverage documents and complex business operations. His passion for education has dedicated him to public schools and serving as a risk management trusted advisor.

DETAILED EXPERIENCE:

Tom's knowledge includes multi-line property and casualty broker, with over 22 years of expertise in risk management, safety, environmental health, and insurance placement for large self insured education groups. Tom began his career in 1991 with Six Flags Magic Mountain and later joined Keenan and Associates as a Risk Control Consultant for schools. He also worked as Senior Loss Control Consultant and Vice President at Arthur J. Gallagher for 15 years.

EDUCATION, PROFESSIONAL, AND PERSONAL INTERESTS:

Tom holds a Masters of Science, Environmental, and Occupational Health from California State University, Northridge and a Masters of Business Administration with an emphasis in Finance from Pepperdine University.

Tom has a Certified Safety Professional license and is licensed by the California Department of Insurance as a Fire and Casualty Broker-Agent.

Outside of his duties at Alliant, Tom enjoys playing sports, especially tennis and basketball, and he also enjoys playing the jazz trumpet, watching the Lakers and action movies.

DANIEL HOWELL, J.D., ARM-P, CPCU
SENIOR EXECUTIVE VICE PRESIDENT
MANAGING DIRECTOR, PUBLIC ENTITY GROUP



ACCOMPLISHMENTS AND AREAS OF EXPERTISE:

Daniel joined the Alliant Insurance Services team in 1998 following over a decade with Fred S. James and Sedgwick. He offers a wide breadth of expertise including the development, implementation, and management of property and casualty insurance and self-insurance programs. Dan understands issues for entities with complex operations and is especially adept at building consensus among a broad array of stakeholders.

DETAILED EXPERIENCE:

Dan currently serves as the Managing Director for the Public Entity Group. Since joining Alliant, he has served as Program Director for the California State University Risk Management Authority (CSURMA), and the broker for the University of California, State of California, Port of Seattle, and Port of Oakland, among many clients. His multi-line property and casualty experience dates from 1987, when he started with Fred S. James, which later became a part of Sedgwick. His expertise ranges from professional liability, public officials liability, educator's legal liability, excess workers' compensation, to major property lines.

EDUCATION, PROFESSIONAL, AND PERSONAL INTERESTS:

Daniel holds an A.B. in History from Stanford University and a Juris Doctorate from UC Hastings College of Law. He also possesses designations in good standing for both the Chartered Property Casualty Underwriter (CPCU) and the Associate in Risk Management (ARM-P). Daniel is a licensed Property & Casualty retail and wholesale broker in several states, and he is an active member of the State Bar of California.

When he is not practicing his profession, he enjoys spending time with his family and outdoor activities.

HEIDI NEWELL, CSRM

ACCOUNT EXECUTIVE
PUBLIC ENTITY GROUP



ACCOMPLISHMENTS AND AREAS OF EXPERTISE:

Heidi joined the Alliant Insurance Services team in 2001. She specializes in national pool clients with an emphasis on educational entities. She authored a manual, “How to Bind Your Insurance” currently used by State of Maine School Districts. Her manual remains the standard used across the state, and results indicate an increase in pool membership.

In addition, she assisted in launching a national captive that placed insurance for national pool accounts. Heidi is an active member of the leadership team at Alliant, and oversees three staff members who are responsible for handling the majority of the national clients in the office.

DETAILED EXPERIENCE:

Having a vast array of public entity insurance coverage expertise, Heidi is well-rounded in many coverage areas including professional liability, public official’s liability, educator’s legal liability coverages, and major property lines.

EDUCATION, PROFESSIONAL, AND PERSONAL INTERESTS:

Licensed by the California Department of Insurance as a Fire and Casualty Broker-Agent, Heidi has completed many hours of continuing education. In addition, she earned her Certified School Risk Management designation and is in process of completing the professional designation of Certified Insurance Counselor (CIC).

When Heidi is not practicing her profession, she enjoys costuming and helps run a small theater with her husband. She also serves as an assistant scoutmaster for her sons Cub Scout troop.

MARIA GREGORIS, CSRМ

VICE PRESIDENT
PUBLIC ENTITY GROUP



ACCOMPLISHMENTS AND AREAS OF EXPERTISE:

Maria joined Alliant's Public Entity Division in 2003. Maria provides account management service to individual school districts, community colleges, and other public entities as well as the administration of Joint Powers Authorities (JPA). Maria has experience in the marketing process of all lines of coverage including liability, workers' compensation, commercial crime, property, cyber liability, and boiler & machinery. Maria works closely with clients to identify exposures and provides innovative solutions for their marketing and risk management needs.

DETAILED EXPERIENCE:

Prior to joining Alliant, Maria worked at Keenan & Associates as a Property and Liability Claims Supervisor and Account Manager specializing in educational entities. Maria continues to specialize in the marketing and the management of school districts as well as JPA administration of two K-12 insurance pools. Maria understands insurance issues affecting public entities. Her primary focus is on client retention, development, and service with an emphasis on insurance program management.

EDUCATION, PROFESSIONAL, AND PERSONAL INTERESTS:

Maria received her Bachelor of Arts Degree from the University of California, Los Angeles. She is licensed by the California Department of Insurance as a Fire and Casualty Broker-Agent and holds a Certified Schools Risk Manager (CSRМ) certification. Maria continues to participate in risk management and industry related classes including 100+ hours of continuing education endorsed by the State of California, Department of Insurance.

Outside of her work at Alliant, Maria's personal interests include photography, tennis, and travelling.

KORTNEY BOLTON, CIC

ACCOUNT MANAGER
PUBLIC ENTITY GROUP



ACCOMPLISHMENTS AND AREAS OF EXPERTISE:

A proud member of the Alliant Insurance Service team since 2010, Kortney currently works on with charter schools and large national accounts. Well organized and a quick learner, she efficiently handles the day-to-day service needs of numerous public entity clients.

DETAILED EXPERIENCE:

Kortney started her Alliant career working on specialized property programs for non-profits and smaller districts in the Special Property Insurance Program (SPIP). Soon after, she took on the added opportunity to learn about pollution coverage and started handling pollution accounts. Always learning and willing to expand her workload, she is now responsible for the daily servicing and renewal needs of several national accounts. Her expertise now extends to workers' compensation, reinsurance liability, property, crime, auto, and other specialized coverage lines.

EDUCATION, PROFESSIONAL, AND PERSONAL INTERESTS:

Kortney earned her Bachelor's of Science in Business Administration from the California Maritime Academy, CSU located in Vallejo, California. Licensed by the California Department of Insurance as a Fire and Casualty Broker-Agent, she has completed many hours of continuing education. In addition, Kortney has obtained the designation of Certified Insurance Counselor (CIC) in 2012. Kortney excels at professional studies and is in the process of earning her Certified Risk Manager (CRM) designation.

When not busy with her Alliant responsibilities, Kortney enjoys spending time with her dog, is active in her church, and is a volunteer mentor for the Orangewood Children's Foundation. A talented knitter, she often knits or crochets baby hats and donates them to an area hospital for critically ill children.

LILIAN A. VANVIELDT

SENIOR VICE PRESIDENT EDUCATIONAL ENTITIES PRACTICE LEADER



ACCOMPLISHMENTS AND AREAS OF EXPERTISE:

Lilian joined the Alliant Insurance Services team in 2001 as an Educational Entities Broker and Joint Powers Authority Executive Director. Lilian provides a comprehensive approach to risk financing and alternative risk analysis for her clients. In her role as a pool administrator, she brings a distinctive understanding of the risk exposures faced by joint power authorities. Her expertise includes developing, implementing, and managing property and casualty insurance and self-insurance programs. Recognized as an educational entities insurance specialist, Lilian expertly manages complex operations, creates strategic plans, and designs manuscript coverage documents.

DETAILED EXPERIENCE:

Since joining Alliant, Lilian has served as lead broker for six public school insurance pools. In addition, she provides peer review for eight other school pools. Lilian's wealth of knowledge includes her role as a multi-line property and casualty broker, with over two decades of noted expertise in claims administration, underwriting, and program marketing. She began her career at Industrial Indemnity and later joined Keenan and Associates as an Account Executive. Her core competencies include a solid knowledge of risk management and loss mitigation policies and practices. Lilian often provides insurance coverage consulting for a wide range of coverages including educator's legal liability, workers' compensation, and various property lines.

EDUCATION, PROFESSIONAL, AND PERSONAL INTERESTS:

Lilian holds a Bachelor of Arts with a major in History and Economics from the University of California at Los Angeles (UCLA). Licensed by the California Department of Insurance as a Fire and Casualty Broker-Agent, Lilian has completed many hours of continuing education. In addition, she holds Property & Casualty Retail/Wholesale Broker licenses in 27 additional states. Lilian is in the process of completing her Chartered Property Casualty Underwriter (CPCU) designation.

In her free time, Lilian spends time with family and friends. Some of her favorite activities include time with her church, basketball and other team sports, reading, and cooking.

ROBERT A. FREY, RPA

SENIOR VICE PRESIDENT, CLAIMS MANAGER

NATIONAL CLAIMS ADVOCACY



ACCOMPLISHMENTS AND AREAS OF EXPERTISE:

Robert joined the Alliant team in 2002 and created the Alliant Brokerage Claims Advocacy practice. He manages a team of highly trained professionals who provide technical claim service to various Alliant practice groups. Some of these groups include Public Entity, Healthcare, Commercial, and Real Estate. In addition, he takes the lead handling large losses, complex losses, and losses with coverage disputes. His expertise also covers real estate development and management and includes high-rise office risks, industrial office/manufacturing risks, hospitality industry, regional shopping centers, and strip mall shopping centers. Robert is well versed in claims handling for construction risks including OCIP, high tech, biotech, and higher education clients. Currently, he serves as the Alliant client advocate for all aspects of the insurance claims process.

DETAILED EXPERIENCE:

Robert is a seasoned professional who offers almost four decades of extensive experience handling property and casualty claims. His insurance career began with Bayly, Martin, & Fay. He then moved on to an advanced position with Morris & Associates, and then to a Claims Executive at Marsh Risk Services. Robert began leading the Claims Advocacy Practice team at Alliant over ten years ago. He is an in-demand speaker and frequently addresses audiences at risk management conferences including PARMA, the Building Owners Managers Association (BOMA), and the International Council of Shopping Centers (ICSC). He has been a guest speaker for the California State University Risk Management Authority (CSURMA) on multiple occasions. In addition, Robert was an instructor at the College of Alameda where he taught classes on personal insurance coverage, claims handling, and adjusting.

EDUCATION, PROFESSIONAL, AND PERSONAL INTERESTS:

He is a charter member of the Registered Professional Adjusters Program as a Registered Professional Adjuster (RPA) and is a former faculty member of the International Council of Shopping Centers (ICSC).

When Robert is not handling claims, he spends time with his family. He enjoys basketball and for many years coached youth and woman's teams. Recently, Robert added a few new interests that include learning to play piano and oil painting.

TIM LEECH, CSP, ARM

FIRST VICE PRESIDENT RISK CONTROL SERVICES



ACCOMPLISHMENTS AND AREAS OF EXPERTISE:

Tim joined the Alliant Insurance Services team in 2010. He leads the Alliant National Risk Control Consulting practice. Tim's experience and expertise includes over 25 years working in the environmental, health and safety field as a leader of staff, project management, and consulting. In his current capacity, Tim works closely with Alliant underwriters and broker teams to ensure staff deliverables are a value added and contribute to client proactive loss mitigation strategies.

DETAILED EXPERIENCE:

Considered an industry generalist, Tim is well qualified in property and casualty risk control consulting. He brings significant expertise in the following industries: Public Entity, Education, Hospitality, Healthcare, Manufacturing, Waste & Trash Haulers, and General Industry.

Prior to choosing Alliant, Tim worked for a retail brokerage as a Director in their Global Risk consulting practice. During this time, he acted a consultant for global and large risk management clients, managed a regional claims and risk control staff, and strategized total cost of risk reduction projects. His broad range of industry experience also includes working as a pipe fitter, engineer/designer of fire protection systems, insurance loss control consultant, and industry environmental, health and safety engineer.

EDUCATION, PROFESSIONAL, AND PERSONAL INTERESTS:

Tim holds a Bachelor of Science degree in Fire Protection and Safety Engineering from Oklahoma State University. He also has obtained two Associate of Science degrees in engineering related disciplines. Tim is a certified Safety Professional and a licensed Property and Casualty Insurance Broker. In Addition, Tim is a member in good standing with an Associate in Risk Management (ARM) designation.

In addition to faith and family, Tim enjoys mountain biking, training, and competing in triathlons. He is a proud member of the "50 Mile Ride for Project Rwanda" planning team, which during its initial five-year history raised over \$250,000.

APPENDIX

D. Benchmarking Study Example

Please refer to the following page(s).

SAMPLE SCHOOL_____

Loss Summary

Valued as of _____

Presented by:



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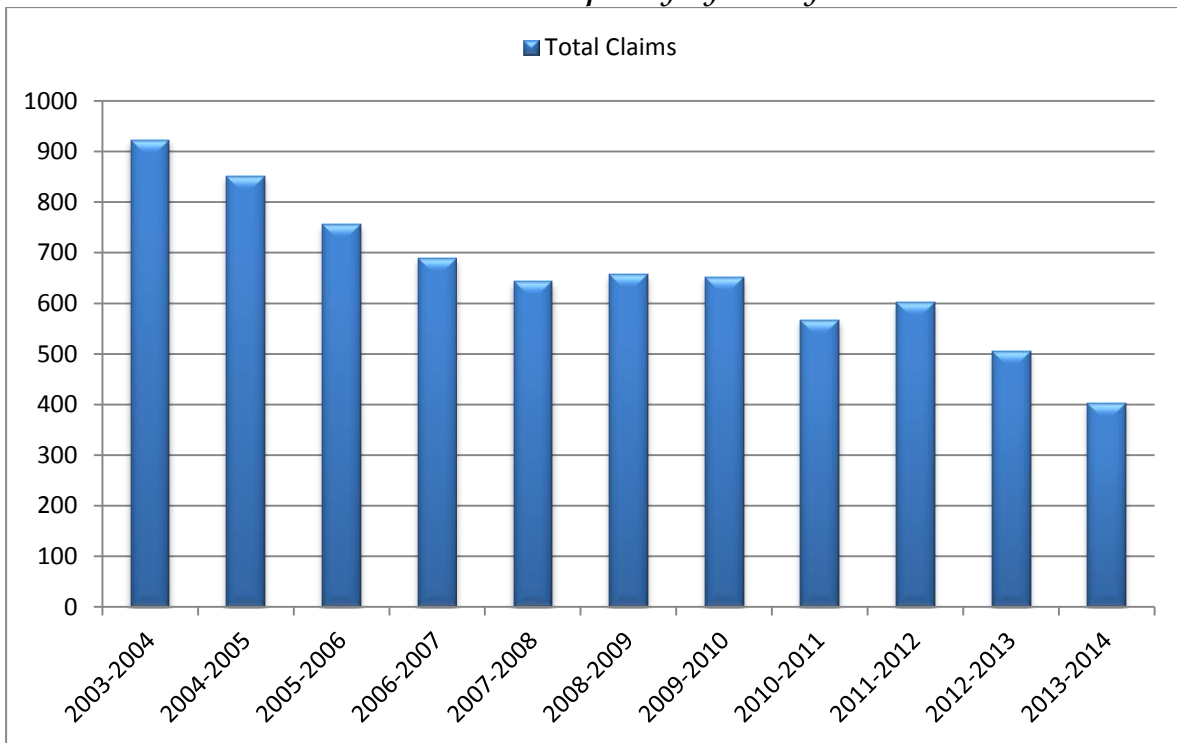
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SCHOOL SAMPLE Loss Summary

Table 1: Total Incurred Summary from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

Program Year	Total Paid	Total Reserve	Total Incurred	# of Claims
2003-2004	\$12,263,832	\$1,018,448	\$13,282,280	923
2004-2005	\$11,270,065	\$1,661,116	\$12,931,181	852
2005-2006	\$9,515,368	\$2,307,403	\$11,822,771	756
2006-2007	\$9,635,581	\$2,533,159	\$12,168,739	689
2007-2008	\$10,722,500	\$1,847,734	\$12,570,234	643
2008-2009	\$8,563,311	\$2,004,062	\$10,567,373	657
2009-2010	\$8,846,708	\$2,806,029	\$11,652,737	652
2010-2011	\$6,696,356	\$3,189,421	\$9,885,778	567
2011-2012	\$5,255,448	\$2,975,585	\$8,231,034	602
2012-2013	\$3,837,936	\$3,534,688	\$7,372,624	505
2013-2014	\$1,281,626	\$2,272,274	\$3,553,900	403
TOTAL	\$87,888,730	\$26,149,920	\$114,038,650	7249

Chart 1a: Claim Frequency by Policy Year



SCHOOL SAMPLE Loss Summary

Table 2: Loss Ratio Summary from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

Program Year	Total Incurred	Payroll	Loss Rate
2003-2004	\$13,282,280	\$3,022,580	439.44%
2004-2005	\$12,931,181	\$2,803,700	461.22%
2005-2006	\$11,822,771	\$2,678,298	441.43%
2006-2007	\$12,168,739	\$2,776,497	438.28%
2007-2008	\$12,570,234	\$2,723,861	461.49%
2008-2009	\$10,567,373	\$2,775,177	380.78%
2009-2010	\$11,652,737	\$2,612,561	446.03%
2010-2011	\$9,885,778	\$2,449,805	403.53%
2011-2012	\$8,231,034	\$2,323,631	354.23%
2012-2013	\$7,372,624	\$2,267,441	325.15%
2013-2014	\$3,553,900	\$2,267,440	156.74%
TOTAL	\$114,038,650	\$28,700,991	397.33%

Table 3: Developed Loss Ratio Summary from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

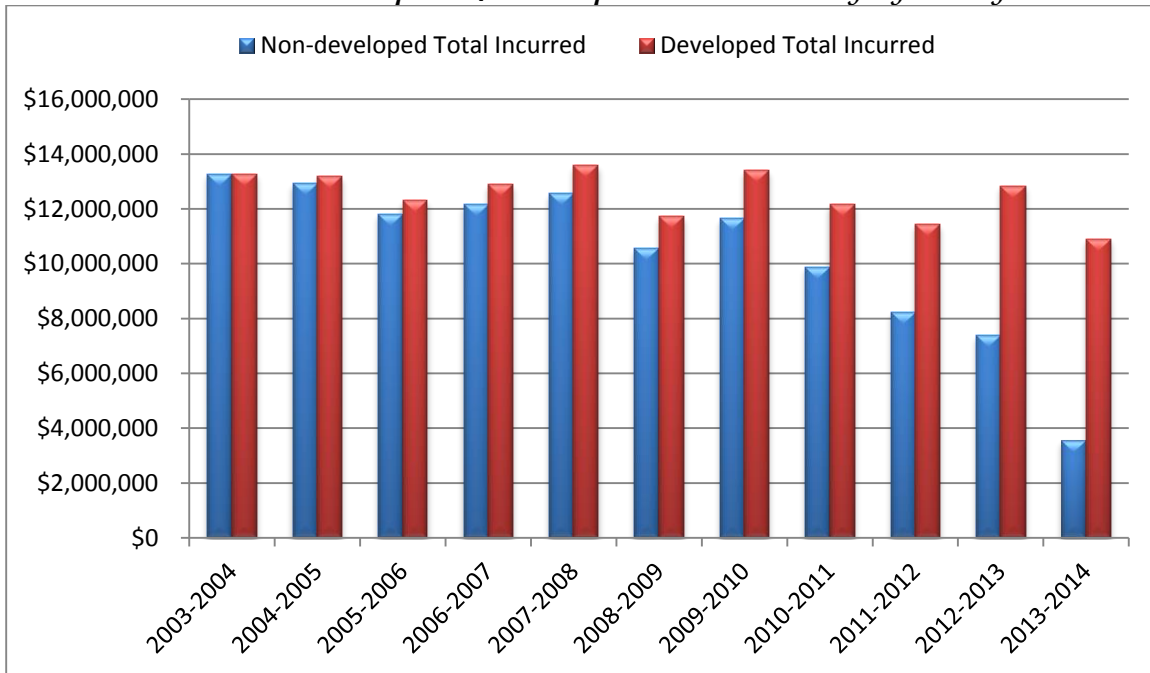
Program Year	Developed Total Incurred	Payroll	Loss Rate
2003-2004	\$13,282,280	\$3,022,580	439.44%
2004-2005	\$13,189,805	\$2,803,700	470.44%
2005-2006	\$12,295,682	\$2,678,298	459.09%
2006-2007	\$12,898,864	\$2,776,497	464.57%
2007-2008	\$13,575,853	\$2,723,861	498.40%
2008-2009	\$11,729,784	\$2,775,177	422.67%
2009-2010	\$13,400,647	\$2,612,561	512.93%
2010-2011	\$12,159,506	\$2,449,805	496.35%
2011-2012	\$11,441,137	\$2,323,631	492.38%
2012-2013	\$12,828,366	\$2,267,441	565.76%
2013-2014	\$10,910,472	\$2,267,440	481.18%
TOTAL	\$137,712,396	\$28,700,991	479.82%

SCHOOL SAMPLE Loss Summary

Table 4: Developed Claims Over \$10,000 from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

Program Year	Development Factor	Total Incurred	Developed Total Incurred	Total Over \$10,000	Total Over \$125,000	\$0	\$10,000
						to \$10,000	to \$125,000
2003-2004	1.000	\$13,282,280	\$13,282,280	\$10,891,609	\$3,489,199	\$2,390,671	\$7,402,410
2004-2005	1.020	\$12,931,181	\$13,189,805	\$11,065,117	\$4,631,101	\$2,124,688	\$6,434,016
2005-2006	1.040	\$11,822,771	\$12,295,682	\$10,372,520	\$4,787,748	\$1,923,163	\$5,584,772
2006-2007	1.060	\$12,168,739	\$12,898,864	\$10,974,305	\$4,847,931	\$1,924,559	\$6,126,374
2007-2008	1.080	\$12,570,234	\$13,575,853	\$11,806,497	\$4,523,855	\$1,769,355	\$7,282,642
2008-2009	1.110	\$10,567,373	\$11,729,784	\$9,986,026	\$3,922,799	\$1,743,757	\$6,063,227
2009-2010	1.150	\$11,652,737	\$13,400,647	\$11,407,110	\$3,129,195	\$1,993,537	\$8,277,915
2010-2011	1.230	\$9,885,778	\$12,159,506	\$10,441,975	\$3,092,645	\$1,717,532	\$7,349,329
2011-2012	1.390	\$8,231,034	\$11,441,137	\$9,485,580	\$1,727,711	\$1,955,557	\$7,757,868
2012-2013	1.740	\$7,372,624	\$12,828,366	\$10,754,813	\$2,380,563	\$2,073,553	\$8,374,250
2013-2014	3.070	\$3,553,900	\$10,910,472	\$8,577,002	\$1,135,460	\$2,333,470	\$7,441,542
TOTAL		\$114,038,650	\$137,712,396	\$115,762,554	\$37,668,207	\$21,949,842	\$78,094,346

Chart 4a: Non-Development/Developed Claim Severity by Policy Year



SCHOOL SAMPLE Loss Summary

Table 5: Developed Loss Stratification from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

Stratification Severity

Program Year	Development Factor	Developed Total Incurred	\$0	\$5,001	\$10,001	\$25,001	\$50,001	\$100,001	Over
			to	to	to	to	to		
			\$5,000	\$10,000	\$25,000	\$50,000	\$100,000	\$250,000	
2003-2004	1.000	\$13,282,280	\$537,413	\$333,258	\$579,413	\$1,628,783	\$2,821,359	\$3,704,393	\$3,677,660
2004-2005	1.020	\$13,189,805	\$511,763	\$312,924	\$690,334	\$1,282,483	\$1,107,118	\$3,877,210	\$5,407,972
2005-2006	1.040	\$12,295,682	\$469,987	\$323,176	\$649,281	\$757,471	\$1,449,429	\$3,754,055	\$4,892,284
2006-2007	1.060	\$12,898,864	\$464,810	\$279,749	\$581,579	\$855,826	\$1,752,452	\$4,125,552	\$4,838,896
2007-2008	1.080	\$13,575,853	\$374,594	\$184,762	\$513,577	\$880,672	\$1,683,415	\$4,873,134	\$5,065,699
2008-2009	1.110	\$11,729,784	\$422,103	\$261,654	\$439,187	\$796,685	\$2,040,685	\$3,911,456	\$3,858,014
2009-2010	1.150	\$13,400,647	\$416,056	\$287,481	\$395,666	\$916,776	\$1,706,520	\$7,620,431	\$2,057,717
2010-2011	1.230	\$12,159,506	\$324,110	\$198,421	\$493,180	\$762,605	\$1,954,509	\$4,866,182	\$3,555,500
2011-2012	1.390	\$11,441,137	\$409,917	\$185,641	\$527,867	\$784,608	\$3,098,236	\$4,526,613	\$1,908,256
2012-2013	1.740	\$12,828,366	\$380,139	\$233,414	\$434,556	\$1,109,481	\$2,959,412	\$5,544,129	\$2,167,235
2013-2014	3.070	\$10,910,472	\$348,454	\$375,016	\$734,965	\$825,124	\$3,832,369	\$3,981,442	\$813,102
TOTAL		\$137,712,396	\$4,659,346	\$2,975,495	\$6,039,605	\$10,600,513	\$24,405,505	\$50,784,596	\$38,242,335

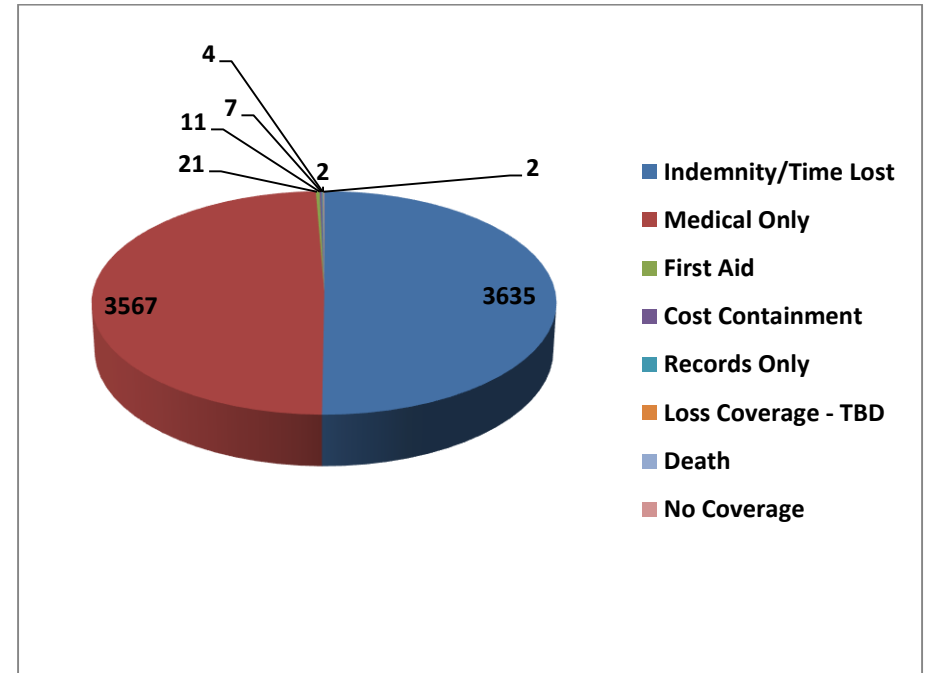
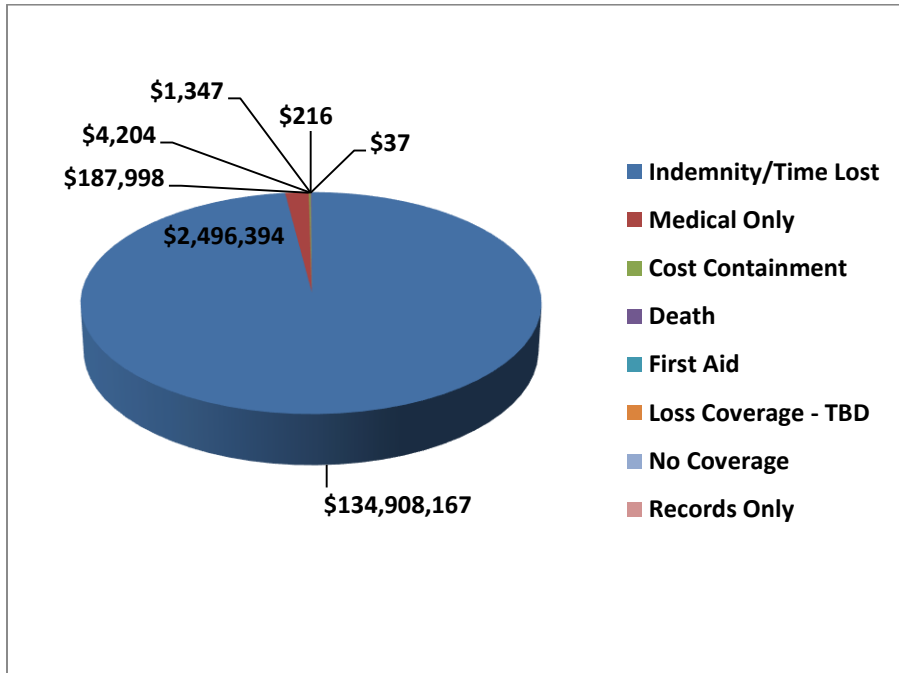
Stratification Frequency

Program Year	\$0	\$5,001	\$10,001	\$25,001	\$50,001	\$100,001	Over
	to	to	to	to	to	to	
	\$5,000	\$10,000	\$25,000	\$50,000	\$100,000	\$250,000	
2003-2004	725	46	36	45	39	24	8
2004-2005	680	42	43	34	15	25	13
2005-2006	599	44	39	21	21	25	7
2006-2007	535	36	37	25	22	25	9
2007-2008	496	26	30	25	22	31	13
2008-2009	514	37	24	22	29	22	9
2009-2010	482	41	25	26	24	48	6
2010-2011	418	29	29	19	27	34	10
2011-2012	440	26	33	21	43	33	6
2012-2013	324	35	28	32	42	37	7
2013-2014	191	51	53	23	55	27	3
TOTAL	5,404	413	377	293	339	331	91

SCHOOL SAMPLE Loss Summary

Table 6: Developed Severity and Frequency by Claim Type from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

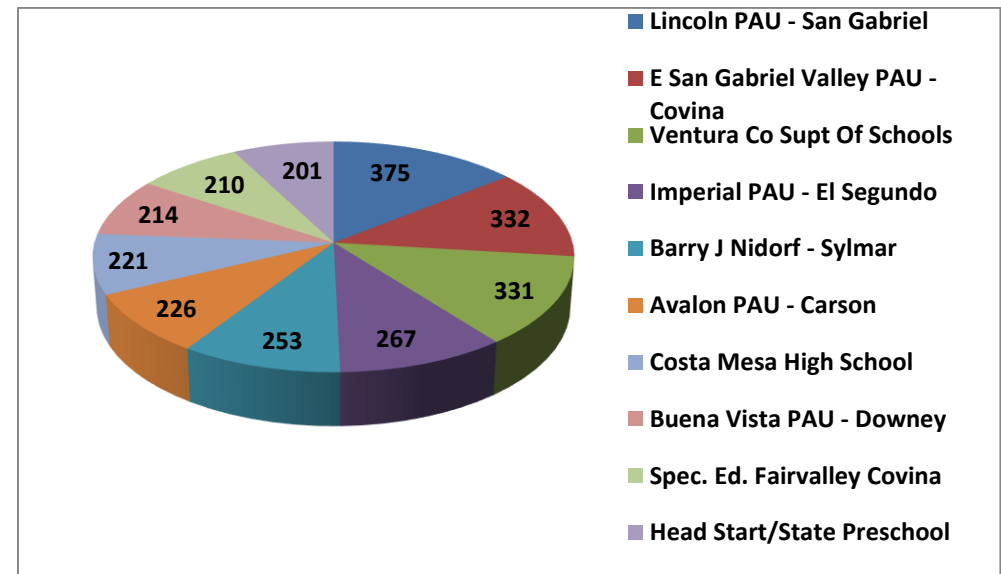
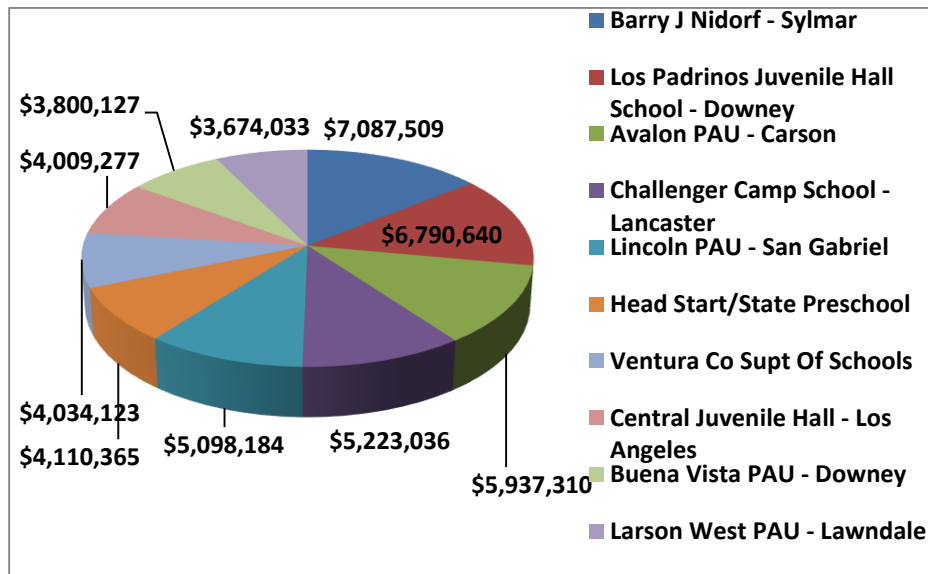
Claim Type	2003/2004		2004/2005		2005/2006		2006/2007		2007/2008		2008/2009		2009/2010		2010/2011		2011/2012		2012/2013		2013/2014		Total Incurred	# of Claims
Indemnity/Time Lost	\$13,048,639	487	\$13,021,416	412	\$12,139,324	369	\$12,592,096	335	\$13,412,313	311	\$11,578,785	345	\$13,279,080	342	\$12,018,670	280	\$11,258,495	297	\$12,623,176	274	\$9,936,173	183	\$134,908,167	3,635
Medical Only	\$154,419	434	\$155,137	438	\$138,153	373	\$179,332	348	\$150,765	330	\$142,327	311	\$111,699	309	\$130,513	286	\$170,668	303	\$189,119	218	\$974,263	217	\$2,496,394	3567
Cost Containment	\$79,222	2	\$13,252	1	\$15,956	1	\$12,549	1	\$12,776	1	\$8,672	1	\$9,868	1	\$10,323	1	\$11,974	1	\$13,406	1	\$0	0	\$187,998	11
Death	\$0	0	\$0	0	\$0	0	\$114,033	1	\$0	0	\$0	0	\$0	0	\$0	0	\$0	1	\$0	0	\$0	0	\$114,033	2
First Aid	\$0	0	\$0	1	\$2,249	13	\$637	2	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$1,318	5	\$0	0	\$4,204	21
Loss Coverage - TBD	\$0	0	\$0	0	\$0	0	\$0	0	\$0	1	\$0	0	\$0	0	\$0	0	\$0	0	\$1,347	1	\$0	2	\$1,347	4
No Coverage	\$0	0	\$0	0	\$0	0	\$216	2	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$216	2
Records Only	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	6	\$37	1	\$37	7
TOTAL	\$13,282,280	923	\$13,189,805	852	\$12,295,682	756	\$12,898,864	689	\$13,575,853	643	\$11,729,784	657	\$13,400,647	652	\$12,159,506	567	\$11,441,137	602	\$12,828,366	505	\$10,910,472	403	\$137,712,396	7,249



SCHOOL SAMPLE Loss Summary

Table 7: Top Ten Developed Severity and Frequency by Location from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

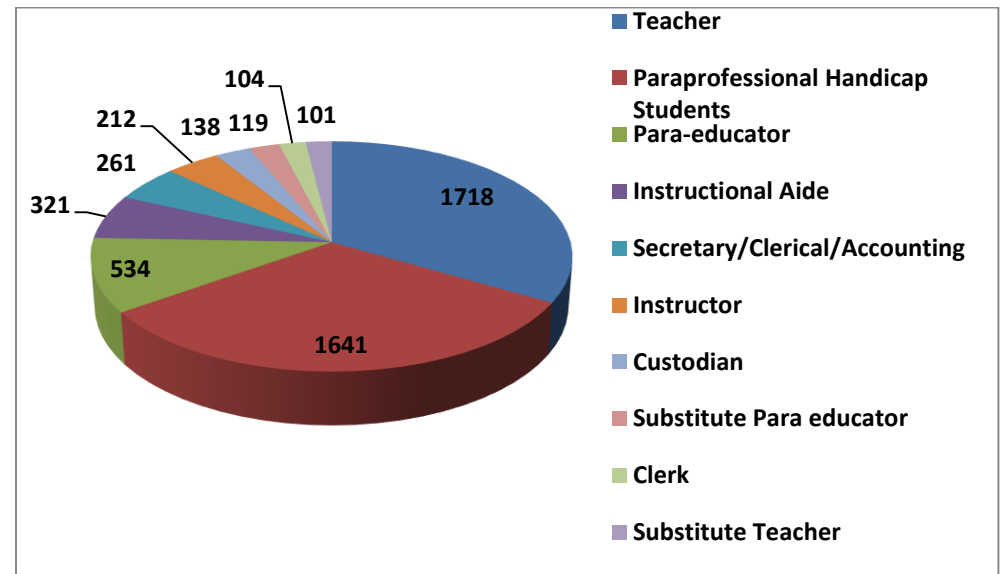
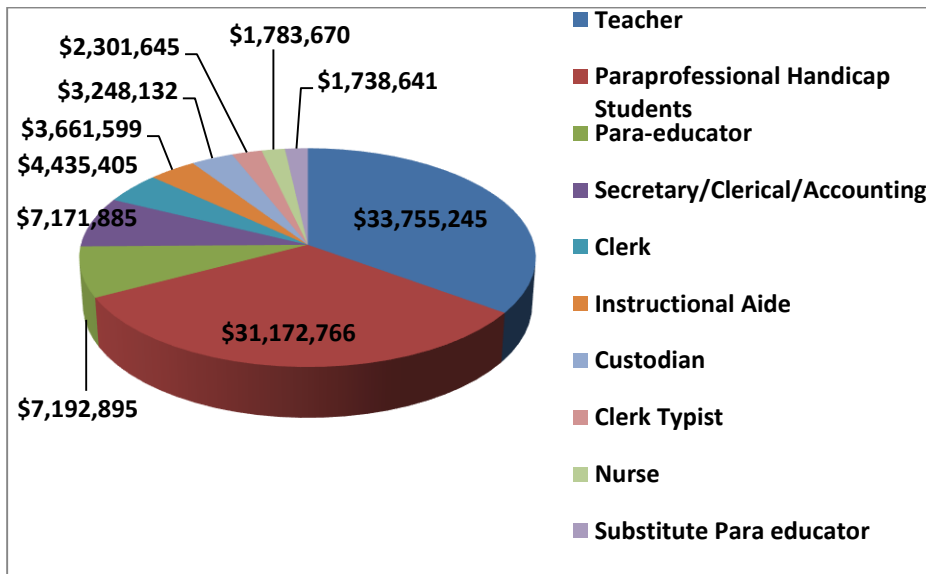
Location	2003/2004		2004/2005		2005/2006		2006/2007		2007/2008		2008/2009		2009/2010		2010/2011		2011/2012		2012/2013		2013/2014		Total Incurred	# of Claims
Barry J Nidorf - Sylmar	\$103,277	23	\$1,165,058	26	\$103,770	20	\$1,017,254	32	\$325,934	32	\$1,816,647	32	\$853,071	28	\$1,230,017	26	\$45,198	21	\$149,255	6	\$278,028	7	\$7,087,509	253
Los Padrinis Juvenile Hall School - Downey	\$249,975	17	\$75,047	12	\$3,216,806	23	\$195,115	11	\$631,469	18	\$203,818	11	\$147,983	13	\$561,134	9	\$698,030	13	\$579,632	27	\$231,632	8	\$6,790,640	162
Avalon PAU - Carson	\$1,041,501	31	\$864,448	43	\$548,212	27	\$32,134	19	\$164,719	13	\$476,721	18	\$19,866	6	\$500,302	12	\$905,005	27	\$590,830	11	\$793,570	19	\$5,937,310	226
Challenger Camp School - Lancaster	\$191,323	9	\$959,509	16	\$403,563	10	\$1,224,566	12	\$3,305	4	\$218,772	12	\$899,448	29	\$459,061	15	\$404,647	14	\$193,607	5	\$265,234	6	\$5,223,036	132
Lincoln PAU - San Gabriel	\$271,323	51	\$328,085	48	\$208,983	36	\$270,962	34	\$386,736	38	\$385,300	31	\$638,409	31	\$101,501	29	\$1,069,712	44	\$1,184,788	32	\$252,385	1	\$5,098,184	375
Head Start/State Preschool	\$895,426	42	\$477,220	41	\$981,741	37	\$507,509	20	\$7,724	6	\$94,668	4	\$564,938	18	\$51,338	9	\$254,236	15	\$180,625	4	\$94,940	5	\$4,110,365	201
Ventura Co Supt Of Schools	\$58,245	2	\$4,325	5	\$115,636	22	\$310,783	51	\$35,499	9	\$62,357	21	\$1,278,537	51	\$700,294	42	\$277,858	40	\$308,071	34	\$882,519	54	\$4,034,123	331
Central Juvenile Hall - Los Angeles	\$903,547	11	\$34,904	13	\$116,290	11	\$256,331	12	\$1,011,541	20	\$394,863	8	\$478,412	10	\$280,144	12	\$402,685	14	\$117,484	9	\$13,077	5	\$4,009,277	125
Buena Vista PAU - Downey	\$599,514	25	\$293,886	29	\$312,626	19	\$263,885	12	\$354,935	12	\$361,202	17	\$326,443	11	\$155,063	16	\$236,921	20	\$477,327	26	\$418,324	27	\$3,800,127	214
Larson West PAU - Lawndale	\$248,488	17	\$599,256	17	\$32,751	19	\$265,489	17	\$167,047	19	\$312,708	21	\$59,102	10	\$607,112	19	\$202,576	31	\$560,353	16	\$619,151	12	\$3,674,033	198
TOTAL	\$4,562,620	228	\$4,801,739	250	\$6,040,378	224	\$4,344,026	220	\$3,088,910	171	\$4,327,057	175	\$5,266,210	207	\$4,645,965	189	\$4,496,868	239	\$4,341,972	170	\$3,848,859	144	\$49,764,605	2,217



SCHOOL SAMPLE Loss Summary

Table 8: Top Ten Developed Severity and Frequency by Occupation from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

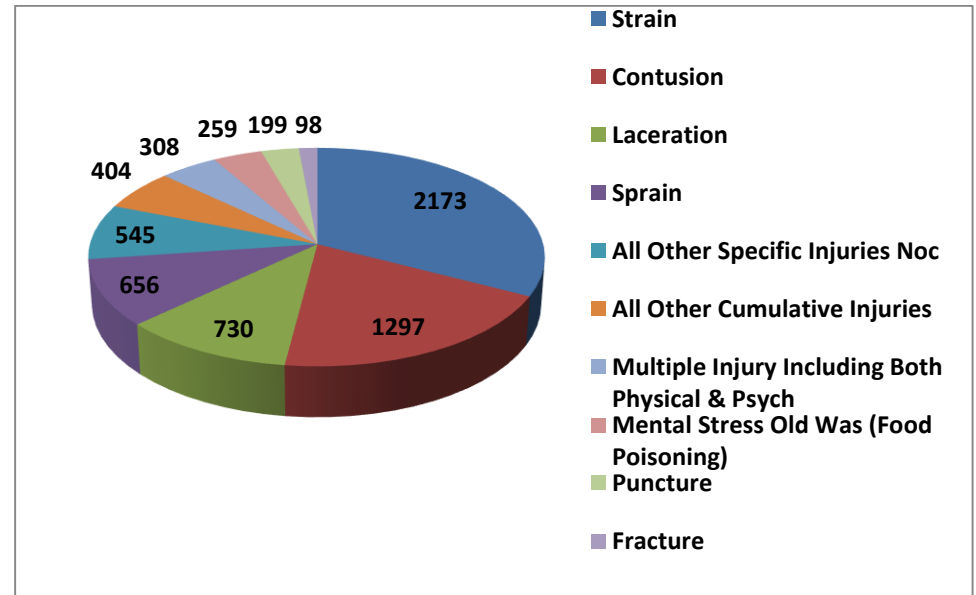
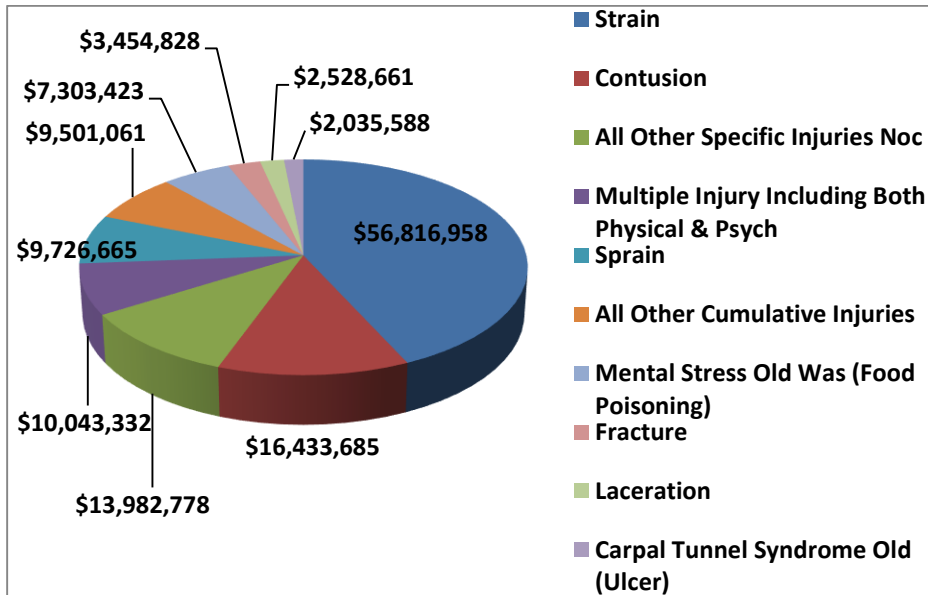
Occupation	2003/2004		2004/2005		2005/2006		2006/2007		2007/2008		2008/2009		2009/2010		2010/2011		2011/2012		2012/2013		2013/2014		Total Incurred	# of Claims
Teacher	\$1,523,446	206	\$2,884,926	203	\$4,475,623	188	\$3,190,236	184	\$3,563,417	153	\$3,383,022	172	\$2,417,160	139	\$3,892,186	122	\$2,515,405	137	\$3,022,045	126	\$2,887,778	88	\$33,755,245	1718
Paraprofessional Handicap Students	\$2,948,977	157	\$2,165,716	180	\$2,311,168	158	\$3,419,829	160	\$3,202,930	158	\$2,420,758	155	\$3,710,346	171	\$2,042,120	131	\$2,864,296	153	\$3,364,664	132	\$2,721,962	86	\$31,172,766	1,641
Para-educator	\$496,242	37	\$361,977	48	\$295,760	48	\$205,282	42	\$520,677	36	\$51,339	45	\$1,379,258	69	\$907,691	51	\$694,130	57	\$1,105,745	47	\$1,174,794	54	\$7,192,895	534
Secretary/Clerical/Accounting	\$754,602	35	\$539,486	38	\$695,723	27	\$247,775	30	\$623,583	25	\$209,114	19	\$558,532	18	\$1,416,344	25	\$813,507	20	\$756,392	11	\$556,826	13	\$7,171,885	261
Clerk	\$1,047,491	8	\$629,365	11	\$189,573	10	\$925,560	18	\$179,609	6	\$206,290	12	\$481,136	10	\$224,578	13	\$240,325	4	\$283,100	10	\$28,377	2	\$4,435,405	104
Instructional Aide	\$2,345,523	155	\$828,096	76	\$173,935	34	\$110,686	29	\$141,765	22	\$317	1	\$428	1	\$0	1	\$0	0	\$0	0	\$60,850	2	\$3,661,599	321
Custodian	\$309,186	14	\$251,619	21	\$77,410	11	\$394,225	16	\$72,520	12	\$158,985	9	\$407,915	13	\$198,917	8	\$140,813	9	\$461,260	12	\$775,282	13	\$3,248,132	138
Clerk Typist	\$168,022	14	\$113,838	15	\$440,996	13	\$668,657	9	\$1,267	4	\$46,156	7	\$303,245	7	\$149,282	9	\$1,488	5	\$390,539	3	\$18,155	5	\$2,301,645	91
Nurse	\$448	4	\$6,191	3	\$1,305	2	\$672,546	5	\$31,945	2	\$409,265	5	\$0	0	\$11,239	4	\$464,246	5	\$131,765	1	\$54,719	1	\$1,783,670	32
Substitute Para educator	\$0	0	\$0	0	\$0	0	\$9,193	3	\$349,076	14	\$121,482	15	\$124,078	19	\$124,434	17	\$338,444	25	\$350,284	17	\$321,650	9	\$1,738,641	119
TOTAL	\$9,593,938	630	\$7,781,214	595	\$8,661,492	491	\$9,843,991	496	\$8,686,789	432	\$7,006,726	440	\$9,382,097	447	\$8,966,792	381	\$8,072,656	415	\$9,865,795	359	\$8,600,394	273	\$96,461,883	4,959



SCHOOL SAMPLE Loss Summary

Table 9: Top Ten Developed Severity and Frequency by Injury Type from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

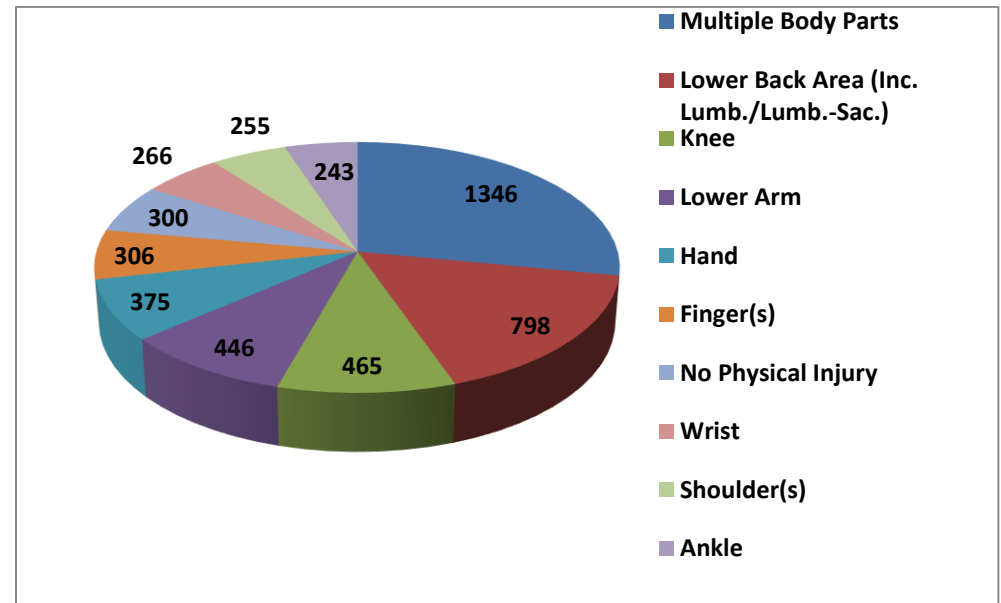
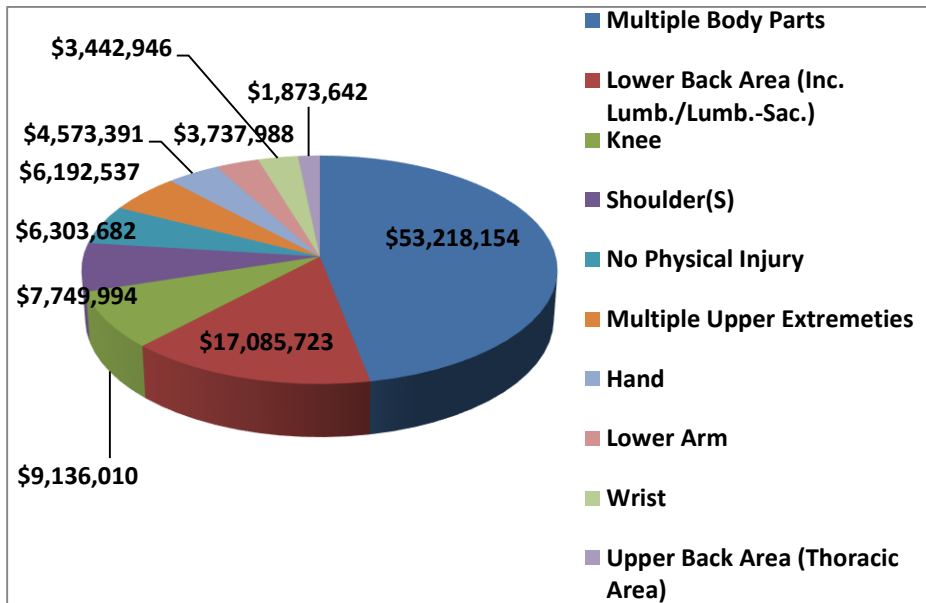
Injury Type	2003/2004		2004/2005		2005/2006		2006/2007		2007/2008		2008/2009		2009/2010		2010/2011		2011/2012		2012/2013		2013/2014		Total Incurred	# of Claims
	Value	Count	Value	Count	Value	Count	Value	Count	Value	Count	Value	Count	Value	Count	Value	Count	Value	Count	Value	Count	Value	Count		
Strain	\$7,485,536	364	\$5,805,420	276	\$5,270,132	204	\$6,466,922	220	\$6,716,134	224	\$4,102,433	174	\$4,578,914	172	\$2,990,838	118	\$3,666,135	127	\$4,800,114	168	\$4,934,381	126	\$56,816,958	2173
Contusion	\$2,538,766	210	\$898,667	114	\$970,356	76	\$936,366	73	\$528,243	75	\$1,268,893	71	\$1,239,413	115	\$1,525,807	155	\$2,728,446	200	\$2,004,446	107	\$1,794,282	101	\$16,433,685	1,297
All Other Specific Injuries Noc	\$340,882	38	\$1,118,654	45	\$1,278,364	71	\$1,466,160	68	\$912,551	50	\$755,612	46	\$2,519,160	57	\$2,933,101	57	\$1,444,893	53	\$481,114	26	\$732,285	34	\$13,982,778	545
Multiple Injury Including Both Physical & Psych	\$322,890	6	\$879,235	51	\$1,189,820	66	\$992,131	37	\$2,163,003	32	\$1,713,059	30	\$1,114,631	44	\$1,125,951	28	\$161,499	9	\$171,031	2	\$210,083	3	\$10,043,332	308
Sprain	\$500,864	56	\$718,794	62	\$885,162	83	\$1,372,829	91	\$540,503	51	\$373,055	44	\$1,231,795	64	\$1,166,471	67	\$1,184,102	53	\$727,467	42	\$1,025,622	43	\$9,726,665	656
All Other Cumulative Injuries	\$104,402	18	\$867,164	39	\$826,058	41	\$643,436	28	\$1,585,033	86	\$1,708,643	116	\$558,370	7	\$194,489	11	\$238,024	14	\$1,994,652	30	\$780,789	14	\$9,501,061	404
Mental Stress Old Was (Food Poisoning)	\$650,154	49	\$1,377,489	27	\$388,958	25	\$173,212	16	\$440,624	15	\$565,381	25	\$1,301,488	44	\$860,280	19	\$951,078	24	\$246,157	11	\$348,603	4	\$7,303,423	259
Fracture	\$406,333	11	\$462,513	8	\$333,031	5	\$291,939	9	\$221,901	8	\$430,330	14	\$226,413	17	\$396,703	6	\$94,884	6	\$222,859	6	\$367,921	8	\$3,454,828	98
Laceration	\$97,326	75	\$455,993	137	\$735,423	108	\$241,900	68	\$20,691	51	\$25,717	60	\$23,980	72	\$311,576	58	\$143,683	58	\$362,408	24	\$109,966	19	\$2,528,661	730
Carpal Tunnel Syndrome Old (Ulcer)	\$178,247	13	\$286,866	10	\$244,770	4	\$101,677	4	\$64,921	3	\$85,892	7	\$107,072	3	\$225,958	5	\$122,163	4	\$569,508	5	\$48,514	2	\$2,035,588	60
TOTAL	\$12,625,399	840	\$12,870,794	769	\$12,122,075	683	\$12,686,572	614	\$13,193,605	595	\$11,029,015	587	\$12,901,237	595	\$11,731,175	524	\$10,734,908	548	\$11,579,755	421	\$10,352,446	354	\$131,826,980	6,530



SCHOOL SAMPLE Loss Summary

Table 10: Top Ten Developed Severity and Frequency by Body Part from 7/1/2003 to 6/30/2014 valued as of 6/30/2014

Body Part	2003/2004		2004/2005		2005/2006		2006/2007		2007/2008		2008/2009		2009/2010		2010/2011		2011/2012		2012/2013		2013/2014		Total Incurred	# of Claims
Multiple Body Parts	\$4,104,645	107	\$2,110,430	117	\$7,188,406	143	\$4,097,913	101	\$6,943,253	152	\$5,060,297	125	\$5,256,098	141	\$3,884,022	103	\$4,792,737	137	\$5,148,790	115	\$4,631,563	105	\$53,218,154	1346
Lower Back Area (Inc. Lumb./Lumb.-Sac.)	\$1,578,660	101	\$3,264,375	116	\$917,372	100	\$2,053,265	93	\$1,137,022	72	\$1,766,302	68	\$1,097,748	49	\$2,094,952	58	\$1,323,992	55	\$799,506	53	\$1,052,529	33	\$17,085,723	798
Knee	\$832,981	61	\$774,055	62	\$593,665	43	\$1,032,842	51	\$1,234,706	42	\$209,965	34	\$739,677	40	\$1,037,945	42	\$1,119,497	41	\$902,768	26	\$657,910	23	\$9,136,010	465
Shoulder(S)	\$673,908	42	\$611,168	39	\$250,942	18	\$1,642,286	29	\$924,146	21	\$400,117	23	\$684,860	19	\$809,432	20	\$410,110	14	\$889,294	22	\$453,731	8	\$7,749,994	255
No Physical Injury	\$363,948	40	\$373,863	17	\$477,144	21	\$256,329	17	\$446,047	13	\$465,482	33	\$1,412,740	48	\$735,962	26	\$818,518	33	\$341,860	39	\$611,788	13	\$6,303,682	300
Multiple Upper Extremities	\$1,141,976	38	\$952,117	21	\$488,290	36	\$21,929	5	\$589,984	14	\$340,400	14	\$610,951	15	\$537,196	26	\$199,959	17	\$1,087,723	17	\$222,013	12	\$6,192,537	215
Hand	\$553,753	49	\$419,934	46	\$438,218	27	\$174,624	35	\$225,931	33	\$531,422	33	\$518,142	40	\$522,380	33	\$407,917	35	\$516,824	24	\$264,245	20	\$4,573,391	375
Lower Arm	\$517,004	63	\$240,572	52	\$379,017	46	\$513,771	53	\$236,568	38	\$60,601	40	\$973,994	46	\$305,273	41	\$210,683	28	\$17,063	14	\$283,442	25	\$3,737,988	446
Wrist	\$635,399	40	\$305,851	34	\$248,631	27	\$245,462	35	\$269,281	20	\$197,911	27	\$378,287	20	\$104,197	15	\$125,605	20	\$698,206	15	\$234,116	13	\$3,442,946	266
Upper Back Area (Thoracic Area)	\$789,246	17	\$10,946	8	\$19,784	5	\$22,742	7	\$3,030	2	\$830,639	13	\$132,994	7	\$14,550	6	\$8,320	6	\$1,120	2	\$40,271	7	\$1,873,642	80
TOTAL	\$11,191,520	558	\$9,063,313	512	\$11,001,469	466	\$10,061,162	426	\$12,009,967	407	\$9,863,136	410	\$11,805,491	425	\$10,045,908	370	\$9,417,338	386	\$10,403,154	327	\$8,451,607	259	\$113,314,067	4,546



APPENDIX

E. Required Forms

Please refer to the following page(s).



American Indian Model Schools

171 12th Street
 Oakland, CA 94607-4900
 510.893.8701
 www.aimschools.org

Building on Success

**REQUEST FOR PROPOSAL
 FOR AN INSURANCE BROKER**

MARCH 15, 2018

American Indian Model School (AIMS) is a public charter school within the Oakland Unified School District serving student from grade K-12. The school operates two (2) elementary schools and one (1) high school. The school operates under a Board of Directors who have authority over the governance of the schools.

American Indian Model School (AIMS) is requesting proposals from qualified proposers to serve as an Insurance Broker for their three (3) charter schools consisting of American Indian Public Charter School, American Indian Public Charter School II, and American Indian Public High School.

Proposals are due no later than 4:00 P.M. Pacific Time, April 16, 2018 to the Superintendent’s Office, American Indian Model School, 171 12th Street, Oakland, CA 94607. Proposals will be accepted by electronic media to the email address: finance@aimschools.org.

Proposer also certifies the it does not discriminate against any employee or applicant for employment on the grounds of race, age, color, national origin, religion, sex, gender, disability, genetic information, or any other classification protected by federal, California state constitutional, or statutory law; and does not and will not maintain or provide its employees any segregated facilities at any of its establishments.

American Indian Model School offers educational and employment opportunities without regard to race, age, color, national origin, religion, sex, gender, disability or genetic information.

Alliant Insurance Services, Inc.

COMPANY NAME
 1301 Dove Street, Suite 200
 ADDRESS
 Newport Beach CA 92660
 CITY STATE ZIP

(949) 260-5096 (949) 756-2713
 PHONE FAX
 tom.boobar@alliant.com
 E-MAIL ADDRESS

Names and signatures below certify that you understand and agree to all information in this Request for Proposal.

Tom Boobar
 AUTHORIZED REPRESENTATIVE (Print)

 4/13/18
 Signature Date

American Indian Model Schools
 171 12th St. Oakland, CA 94607
 510.893.8701 www.aimschools.org

Coversheet

Discussion and Possible Action Regarding

Section: III. Action Items
Item: D. Discussion and Possible Action Regarding
Purpose: Vote
Submitted by:
Related Material: 2018 Carrier Service Agreement.pdf

Carrier Commercial Service
Contractor License#499642
600 McCormick Street
Suite B
San Leandro, CA 94577
510.347.2000
Fax 510.347.2099



January 9, 2018

American Indian Public Charter II
171 12th Street
Oakland, CA 94607
Attention: Tiffany Tung

Subject: Carrier Service Agreement No. 271A30003

Job Name: American Indian Public Charter II
Job Address: 171 12th Street
Job City: Oakland

Dear: Tiffany Tung

We are pleased to renew the above referenced agreement. This renewal will become effective on February 1, 2018 and continue for a like period of 1 Year.

Thereafter, the agreement will automatically renew at each contract anniversary for an additional like term unless terminated by either party by giving written notice to the other at least ninety (90) days prior to the end of the then current term delivered via overnight of certified mail.

The agreement price in year one of the renewal term will be \$4884.00 payable \$1221.00 quarterly. The total agreement price is \$4884.00 covering the renewal term of 1 Year. After the renewal term, the agreement price will be adjusted annually to reflect the increase in labor and material costs. Invoicing shall occur as noted above. If you need to issue a new purchase order for payment purposes, please indicate the purchase order number below.

Please indicate your acceptance by signing below and returning a copy of this letter to our office via mail, email attachment or facsimile. If you need to revise the billing cycle or have questions about this renewal, please contact our office.

Thank you for the continuing opportunity to allow Carrier to provide your maintenance services. In today's frantic business world, we often forget to express our appreciation for our customers. We realize customers like you are our most important assets, and our employees are dedicated to providing the best service possible.

Sincerely,

Judy Shepherd

Coordinator – Contracts
Judy.Shepherd@Carrier.UTC.com

Authorized Acceptance:

Signature: _____
Title: _____
Date: _____
PO# _____

Coversheet

Discussion and Possible Action Regarding

Section:	III. Action Items
Item:	E. Discussion and Possible Action Regarding
Purpose:	Vote
Submitted by:	
Related Material:	SFS Service Agreement - AIMS 180413.pdf SFS Proposal - American Indian Model Schools 180413.pdf

SERVICE AGREEMENT

This Service Agreement (“Agreement”), effective as of _____, 2018 (“Effective Date”) is entered into by and between American Indian Model Schools, a California educational organization having an address at 171 12th Street, Oakland, CA 94607 (hereinafter “SCHOOL”), and School Food Solutions L3C, a Louisiana low-profit limited liability corporation having an address at 10455 Jefferson Highway Ste 110, Baton Rouge, LA70809 (hereinafter “SFS”).

WHEREAS, SFS has extensive experience in providing foodservice program administration and technical support services to schools, and is being engaged by SCHOOL as an independent contractor to provide such services, as described below, for the duration of the term specified herein;

NOW THEREFORE, for the consideration provided for herein, the parties hereby agree to the following:

1. Scope of Services: SFS shall provide the services listed in its proposal to SCHOOL dated April 13, 2018 (the “Proposal”), a copy of which is attached hereto. The Services may be modified from time to time by agreement in writing between SCHOOL and SFS.
2. Compensation for Services: For the Services provided by SFS to SCHOOL, SCHOOL shall compensate SFS as specified on page 6 of the Proposal. SFS Services excludes cost of postage and handling, POS and software. SFS shall invoice SCHOOL monthly and be paid net 15 days after receipt of the applicable invoice from SFS. SFS must present receipts in a form satisfactory to SCHOOL for reimbursement of any approved out-of-pocket costs and expenses.
3. Term: The Term of this Agreement shall be from June 1, 2018 through June 30, 2019. The Term shall automatically renew for successive one-year periods unless this Agreement is terminated subject to Article 8 below.
4. Relationship of the Parties:
 - a. Independent Contractor Status: SFS understands and agrees that it is acting as an independent contractor and is not an agent or employee of SCHOOL by virtue of this Agreement. SFS will perform the requested services, under the general direction of SCHOOL, but will determine, in its reasonable discretion, the manner and means by which the services are delivered.
 - b. Employment Taxes and Benefits: As an independent contractor, SFS has the responsibility to file all tax returns required by law and assumes sole liability for taxes due on income earned pursuant to this Agreement. SFS acknowledges it is not entitled to any rights or benefits (including vacation, 401k and insurance) to which employees of SCHOOL may be entitled. SFS agrees to indemnify and hold SCHOOL harmless from any liabilities, claims or actions relating to employment taxes or benefits. SFS understands and acknowledges upon signing this Agreement that SCHOOL will not supply any workers' compensation benefit required by any jurisdictions to anyone with independent contractor status and SCHOOL accepts no liability for SFS's (or its employee's/subcontractor's) general health.
5. Confidentiality and Non-Disclosure:
 - a. Confidential Information: As used herein, the term “Confidential Information” shall mean all information, compilations, business plans, technical and financial information, student data and the like, which relate to the products, services or business of SCHOOL and which have not been

disclosed by SCHOOL to the general public or which SFS knows are not generally known to the public.

b. Nondisclosure: SFS acknowledges that it shall not obtain any right or license to any Confidential Information. SFS agrees to use commercially reasonable efforts not to allow any unauthorized person access to Confidential Information and to protect such Confidential Information.

6. Representations and Warranties: SFS represents and warrants that: (a) the Services described herein will be performed in a professional and workmanlike manner in accordance with reasonable industry standard; (b) use by SCHOOL or its affiliates, subsidiaries, assignees and licensees of the materials provided by SFS, if any, will not violate or infringe any patent, copyright, trademark, trade secret or other personal or proprietary rights of any party; (c) SFS will not enjoin or interfere with the distribution, licensing or exploitation of the merchandise or other products of SCHOOL .

7. Indemnification: SFS agrees to indemnify, defend and hold SCHOOL, its affiliates, subsidiaries, assignees and licensees, harmless from and against any losses, costs, expenses (including reasonable attorney's fees), judgments, settlements, and damages resulting from any claim or action arising out of SFS's willful misconduct or gross negligence.

SCHOOL agrees to indemnify, defend and hold SFS, its employees, sub-consultants, affiliates, subsidiaries, assignees and licensees, harmless from and against any losses, costs, expenses (including reasonable attorney's fees), judgments, settlements, and damages resulting from any claim or action arising out of SFS's performance of its services hereunder, except in the case of SFS's gross negligence or willful misconduct.

8. Termination: Either party may terminate this Agreement at least ninety (90) days prior to the end of any Term, by giving notice in writing to the other party. In the event of termination, SFS shall be due its compensation for services and reimbursement for approved expenses through the effective date of termination.

9. Non-solicitation of Employees: During the Term of this Agreement neither party shall hire nor attempt to hire any persons that were employed by the other party in the previous twelve months without the written consent of the other party. In the event written consent is not granted, the sole remedy for violation of this Article 9 shall be a payment of liquidated damages to the offended party equal to 50% of the total compensation of the solicited employee for the prior twelve months.

10. Force Majeure: Neither party shall be liable if the performance of any part or all of this Agreement is prevented, delayed, hindered, or otherwise made impracticable or impossible by reason of any strike, flood, riot, fire, explosion, hurricane, war, act of God, sabotage, accident or any other casualty or cause beyond either party's control, and which cannot be overcome by reasonable diligence and without unusual expense.

11. Limitation of Liability. In no event shall SFS be liable for consequential, indirect, punitive or exemplary damages. Notwithstanding any provision of this Agreement to the contrary, SFS shall not under any circumstances be liable for more than the aggregate amount of six months of its Compensation received under this Agreement.

12. Severability: If any provision herein shall be held to be invalid or unenforceable, the remaining provisions shall continue to be valid and enforceable.

13. Waiver of Contractual Right: The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

14. Remedies: This Agreement shall be governed by the laws of California. The parties agree to cooperate in good faith in all actions relating to this Agreement, to communicate openly and honestly, and generally to attempt to avoid disputes in connection with this Agreement. If, nevertheless, a dispute should arise in connection with this Agreement, the parties agree to use their best efforts to resolve such dispute in a fair and equitable manner and without the need for expensive and time-consuming litigation. In the event any dispute arises between SCHOOL and SFS concerning this Agreement, it shall be resolved in accordance with the Expedited Procedures of the Commercial Arbitration Rules of the American Arbitration Association.

15. Notices: Any notice or other communication required or which may be given hereunder shall be in writing to the party to whom notice is to be given at the addresses first set forth above.

16. Entire Agreement; Amendments: This contract sets forth the entire Agreement between the parties with respect to the subject matter hereof, and it may only be changed in writing signed by both parties. Any prior or contemporaneous agreements, promises, negotiations or representations not expressly set forth in this Agreement are of no force or effect.

ACCEPTED AND AGREED:
American Indian Model Schools

ACCEPTED AND AGREED:
School Food Solutions L3C

By: _____
Name: _____
Title: _____

By: _____
Name: _____
Title: _____



April 13, 2018

Tiffany Tung
Data and Operations Manager
American Indian Model Schools
171 12th Street
Oakland, CA 94607

Dear Ms. Tung,

School Food Solutions is pleased to submit this proposal for Foodservice Administration Services to American Indian Model Schools.

We are strong believers in the power of charter schools to improve the lives of children that might not otherwise have a high quality educational option. We understand that primarily, charter schools are about raising student achievement. By providing efficient and effective Foodservice Administration services, we seek to play a small part in helping you produce better student achievement outcomes for children.

Thank you for the opportunity to submit this proposal!

Sincerely yours,

Tess Bradford
CEO

California
2443 Fillmore St.,
#380-2939
San Francisco, CA
94115

Baton Rouge
10455 Jefferson Hwy.,
Suite 110
Baton Rouge LA
70809

New Orleans
2372 St. Claude Ave.,
Suite 300
New Orleans, LA
70117

New York
8 West 126th St.,
3rd Floor
New York, NY
10027

Company Profile

School Food Solutions (SFS) is highly qualified to provide foodservice administration services to American Indian Model Schools.

- SFS has been providing specialized foodservice administration services to schools for nine years, and now serves over 50 schools. Its clients include independent charter schools, school districts, multi-campus operators, and private schools.
- School Food Solutions' founder Joe Keeney has 20 years of experience serving in the charter school community. Prior to founding SFS, Joe was president of Edison Charter Schools, where he helped open and operate over 50 charter schools serving 30,000 students in 14 states from 1997-2005.
- The SFS team includes full-time & part-time staff with deep expertise in foodservice and school operations, procurement and financial management, and nutrition and cafeteria management. This team includes:
 - Tess Bradford is the Chief Executive Officer of School Food Solutions. Previously the Chief Operating Officer of the oldest and largest Charter Management Organization in New Orleans and Executive Director of the Recovery School District, Tess has more than ten years of experience in charter school operations.
 - Robert Keogh is School Food Solutions' Chief Financial Officer. He previously served as Director of Finance for the Algiers Charter School Association, managing budgets and grants for New Orleans' largest Charter Management Organization. He also served as the Director of Procurement and Finance for the Recovery School District, a special statewide school district administered by the Louisiana Department of Education.
 - Lauren Knight is School Food Solutions' Chief Operating Officer. She was previously a Business Operations Manager at a 600-student PreK-8 school. Lauren is a certified secondary special education teacher and Teach for America alum who taught at KIPP.
 - The School Food Solutions finance & operations team is comprised of: Xiao Lai who holds a Master of Finance degree from Tulane University; Margo Price who holds a Master of Science in Human Development & Family Studies from the University of Delaware; and Nicholas Goldsobel, a Culinary Nutrition graduate pursuing his Registered Dietician license.
- The School Food Solutions team successfully managed twelve (12) CDE audits in 2016-17, with no financial findings for any of our clients.

Food Service Administrator Scope of Services

School Food Solutions proposes to deliver the following Provider Services, subject to the execution of a contract specifying the roles and responsibilities of each party and other terms and conditions. The services detailed below may be customized depending on your school's unique needs.

School Food Authority RFP Management

1. Help SFA find a vendor in compliance with USDA & state regulations
 - a. Manage foodservice vendor RFP and competitive bid process through the following phases:
 - i. RFP creation
 - ii. Advertisement
 - iii. Distribution to local vendors
 - iv. Pre-Bid Meeting and walkthrough (if elected)
 - v. Question and Answer phase
 - vi. Taste Test (if elected)
 - vii. Bid Opening and Evaluation
 - viii. Award Notification
 - ix. Contract Negotiation
2. Conduct small purchase/micro-purchase procurement process for Point of Sale (POS) software system

Annual Set-up

1. Closeout and rollover the Point of Sale (POS) system for new school year.
2. Complete CNIPS application packet on behalf of SFA.
3. Establish paid meal prices in accordance with *USDA Paid Equity Tool*.
4. Provide *Unpaid Meal Policy* template and assist SFA with customizing for their school families.
5. Provide *Local Wellness Policy* Updates and guide SFA through implementation steps.
6. Customize paper and online eligibility materials: Letters to Households; Instructions for Families; updated Free and Reduced Lunch applications for SFA.
7. Conduct training to SFA staff on compliant and complete applications and procedural execution.

On-going Support

1. Provide training, as necessary to SFA staff regarding POS meal counts and completion of all required documents for filing site applications and claims under the Program.
2. Perform the required daily and monthly edit checks of meal counts.
3. Develop and implement a system for follow-up on those meal counts which suggest the likelihood of meal counting problems.
4. Assist SFA in creation of internal controls which ensure the accuracy of meal counts prior to the submission of the monthly claims for reimbursement of FRL meals served, including but not limited to review of edit check worksheets, providing follow-up for potential meal counting problems, and provide technical assistance.
5. Perform resource management services for SFA with respect to its food service account, including, but not limited to tracking amounts owed to Vendor for meals served, and amounts owed to SFA, if any, by Vendor and/or DOE under the Program.
6. Within fifteen (15) business days following the end of each month, based upon meal counts provided by SFA, but no more than once per month, submit all information and proper forms regarding meal counts to DOE, USDA, or other applicable authority, for reimbursement claims under the Program.
7. Provide the independent periodic audits of claims for reimbursement, as required by the Program. Ensure resolution of Program review and audit findings.
8. Conduct a periodic on-site review of the meal counting and claiming system employed by SFA, at least once per fiscal year.
9. Perform periodic on-site inspections of Vendor's performance in providing food and services within Program requirements.
10. Hold a mid-year and end of year review of the Program with SFA point-of-contact.

Eligibility Management

1. Review and perform data entry of all paper and online FRL applications received by SFA in accordance with program requirements within ten (10) days of receipt.
2. Review and approve all FRL applications for SFA and maintain files of approved and denied FRL applications for 3+ years.
3. Send FRL notification letters to all households who submitted applications in accordance with program requirements.
4. Maintain student eligibility roster on SFA's POS platform.
5. Conduct *Second Review of Applications* and state reporting when required.

6. Conduct *Verification for Cause* and *Annual Verification* and report all findings to the state by designated deadline;
 - a. Calculate sample size and conduct random selection
 - b. Serve as the Confirming Official
 - c. Share verification tracker with SFA
 - d. Notify families of their selection and steps to complete verification – including follow-up communications
 - e. Provide toll-free phone number, fax line, and email address to collect verification documentation from families
 - f. Analyze proof of income submitted and verify
 - g. Send out Verification Approvals and Adverse Actions to families
 - h. Complete *Annual Verification Report*.

Audit Support (if requested)

SFAs are required to go through 2 separate audits once every three years: Procurement Review & Administrative Review. In the event your SFA is selected for either a Procurement Review or Administrative Review, SFS will provide assistance during state and USDA audits and technical assistance visits including:

1. Assessment of current SFA policies in accordance with state and USDA requirements; including but not limited to, Eligibility, Civil Rights, Wellness, Smart Snacks, Food Safety and Storage, Outreach, Professional Standards Procurement, etc. Provide Policy recommendations where needed.
2. Compilation of the Offsite Assessment Tool (OATs) and accompanying documentation uploaded to CNIPs.
3. Composing the Benefit Issuance Document (BID) and multiple reviews of the FRL applications to ensure no findings.
4. Assembly of required Verification documentation and summaries.
5. Review of menus, product formulation statements, CN labels, transport logs, production records and documentation re: trans-fat for test month.
6. Comprehensive review of daily meal counts and edit checks during test month.
7. Completion of the following if applicable or requested by state; Dietary Assessment Tool, Paid Lunch Equity Tool, Revenue from Non-Program Foods.
8. Compiling the Administrative Review Box for state staff prior to onsite review.
9. One pre-audit support visit to each site being reviewed.
10. SFS staff onsite during audit.

Unduplicated Pupil Count Support/ Local Control Funding Formula (LCFF) (if requested)

1. Census Day CALPADS Reporting

- a. Verify student program (SPRG) records for Free/Reduced Eligible students prior to SFA’s submission of CALPADS 1.18 – FRPM /English Learner/Foster Youth – Student List Report.
- 2. Spring Audit Fieldwork of Unduplicated LCFF Pupil Count
 - a. Prepare and package Free/Reduced back-up information for the student sample pool selected by financial auditors

Service Fees

School Food Authority RFP Management

- \$3,500 RFP management; applies to each RFP requested by AIMS and inclusive of all AIMS schools.

Annual Set-up, On-going Support, and Eligibility Management

- AIPCS I and AIPCS II
 - \$2.95 multiplied by the average number of Program Students per day (calculated by total meals served per month divided by number of days of service).
- AIPHS
 - \$2.95 multiplied by the average number of Program Students per day (calculated by total meals served per month divided by number of days of service).

Audit Support (if elected)

- \$6,000 flat fee for Administrative Review
- \$1,500 flat fee for Procurement Review

Unduplicated LCFF Pupil Count Support (if elected)

- Flat rate pricing based on total enrollment:

Student Enrollment	Support Fee
1 - 300	\$500
301 - 600	\$750
601 - 1000	\$1000
1001 - 2000	\$1500
2001+	\$2000

In our experience, this cost is a fraction of the cost of the time spent by the school business management and operations team on the foodservice program, especially at the beginning of the school year when school operations bandwidth is tightest.