

## ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS

**NOTE: As set forth in Section 7 of the RFP: The provisions marked with an (\*) are minimum contract terms and conditions (“Minimum Terms”). A material exception to a Minimum Term may render a proposal non-responsive.**

SUPERIOR COURT OF CALIFORNIA, COUNTY OF VENTURA

**AGREEMENT COVERSHEET** rev 04-10

**For Temporary Staffing Services**

AGREEMENT NUMBER
<b>[Agreement Number]</b>
FEDERAL EMPLOYER ID NUMBER
<b>[Fed. Employer ID Number]</b>

1. In this agreement (the “Agreement”), the term “Contractor” refers to **[Contractor name]**, and the term “COURT” refers to the **Superior Court of California, County of Ventura**.
2. This Agreement becomes effective as of **[Date]** (the “Effective Date”) and expires on **[Date]**.
3. The title of this Agreement is: **Temporary Staffing Services**  
 [The title listed above is for administrative reference only and does not define, limit, or construe the scope or extent of the Agreement.]
4. The parties agree to the terms and conditions of this Agreement and acknowledge that this Agreement (made up of this coversheet, the following **[TBD]** exhibits, and any attached forms) contains the parties’ entire understanding related to the subject matter of this Agreement.

COURT’S SIGNATURE	CONTRACTOR’S SIGNATURE
<b>Superior Court of California,            County of Ventura</b>	CONTRACTOR’S NAME <i>(if Contractor is not an individual person, state whether Contractor is a corporation, partnership, etc.)</i> <b>[Contractor name]</b>
BY	<b>DO NOT SIGN</b>
PRI <b>[N]</b>	
ADDRESS <b>Attn: Finance &amp; Planning Division            800 S. Victoria Avenue            Ventura, CA 93009</b>	ADDRESS <b>[Contractor Address; include addressee]</b>

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**EXHIBIT A  
STANDARD PROVISIONS**

1. Indemnification

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

2. Relationship of Parties

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

3. Termination for Cause

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

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

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- B. In the event the COURT terminates this Agreement in whole or in part, due to the Contractor's failure to perform, the COURT may procure, upon such terms and in such manner as it may deem appropriate, supplies or services similar to those so terminated, and the Contractor shall be liable to the COURT for any excess costs for such similar supplies or services, subject to the limitations contained elsewhere herein; further, the Contractor shall continue the performance of this Agreement or the Order to the extent not terminated under this provision.
  - C. The Contractor shall not be liable for any excess costs if the failure to perform the Order or the Agreement arises out of acts of Force Majeure; but in every case the failure to perform must be beyond the control and without the fault or negligence of the Contractor.
  - D. If, after Notice of termination for default of the Order or this Agreement, it is determined for any reason that the Contractor was not in default under this provision, or that the default was excusable under this provision, the obligations of the COURT shall be to pay only for the services rendered at the rates set forth in the Master Agreement.
  - E. In the event an Assignment is terminated, but neither the Order that authorized that Assignment nor the Agreement is terminated pursuant to this provision, such termination of Assignment shall be per Exhibit E, Description of Services, paragraph 8, Termination of Assignment and Conversion.
  - F. The rights and remedies of either party provided in this provision shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Agreement.
4. No Assignment
- Without the written consent of the COURT, the Contractor shall not assign this Agreement in whole or in part.
5. Time of Essence
- Time is of the essence in the Contractor's performance of this Agreement and any Orders.
6. Validity of Alterations
- Alteration or variation of the terms of this Agreement or any Order shall not be valid unless made in writing and signed by the parties, and an oral understanding or agreement that is not incorporated shall not be binding on any of the parties.

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7. Consideration

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

*END OF EXHIBIT*

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**EXHIBIT B  
SPECIAL PROVISIONS**

1. Definitions

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

- A. **“Amendment”** means a written document issued by the COURT and signed by the Contractor which alters its Order and identifies the following: (i) a change in the work, (ii) a change in Order Amount, or (iii) a change in time allotted for performance; also means a written document issued by the COURT and signed by the Contractor which alters the terms of the Agreement.
- B. **“COURT”** refers to the Judicial Council of California, Administrative Office of the Courts.
- C. **“Standard Agreement Coversheet”** means the form used by the COURT to enter into agreements with other parties.
- D. **“Standard Amendment Coversheet”** means the form used by the COURT to amend agreements with other parties.
- E. **“Assigned Personnel”** refers to the individual(s) named and listed as “Hire Name” in an authorized Order to perform the work of the applicable Order.
- F. **“Assignment”** refers to a temporary post or project that provides for certain responsibilities during an estimated time period.
- G. **“Billing Rate”** refers to the hourly rate that the Contractor will bill and the COURT will pay to the Contractor for the work performed for an Assignment by an Assigned Personnel pursuant to an Order issued under this Agreement. A Billing Rate, as set forth in an Order, shall be in accordance with the appropriate Billing Rate set forth in Exhibit D, Schedules, or it shall be pursuant to an agreement, documented in writing by the parties in accordance with this Agreement, which shall be incorporated into Exhibit D, Schedules, via a subsequent Amendment to this Agreement. A Billing Rate includes, as appropriate, either (i) the Salary Rate, to be paid by the Contractor to the Assigned Personnel for performing the work set forth in an applicable Order, and the Contractor Mark-up; (ii) the Conversion Salary Rate, to be paid by the Contractor to the Assigned Personnel for performing the work set forth in an applicable Order, and the Contractor Mark-up; (iii) the Salary Rate, to be paid by the Contractor to the Assigned Personnel, who was referred by the COURT, for performing the work set forth in an applicable Order, and the COURT Referral Mark-up; or (iv) the Subcontractor Billing Rate, to be paid by the Contractor to a Subcontractor when subcontracted Assigned Personnel perform the work set forth in an applicable Order, and the Subcontractor Mark-up.

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- H. “**Classification**” refers to the description of the qualifications, capabilities, and abilities, generally required of the job/position, for temporary services requested for an Assignment, pursuant to this Agreement. Classifications are set forth in Exhibit F, Classifications, but may be approved in writing, by the parties in accordance with this Agreement, for incorporation via a subsequent Amendment.
- I. The “**Contract Documents**” constitute the entire integrated agreement between the COURT and the Contractor, as attached to and incorporated by a fully executed COURT Standard Agreement Coversheet, including, without limitation, the Agreement, and any and all Orders authorized by COURT.
- J. “**Confidential Information**” means trade secrets, financial, statistical, personnel, technical, and other Data and information relating to COURTS business or the business of its constituents. Confidential Information does not include (i) information that is already known by the receiving party, free of obligation of confidentiality to the disclosing party; (ii) information that becomes generally available to the public, other than as a result of disclosure by the receiving party in breach of this Agreement; (iii) information that is independently developed by the receiving party without reference to the Confidential Information; and (iv) information that the receiving party rightfully obtains from a third party free of the obligation of confidentiality to the disclosing party.
- K. The “**Contractor**” means the individual, association, partnership, firm, company, consultant, corporation, subsidiaries, or combination thereof, including joint ventures, contracting with the COURT to provide the contracted work.
- L. “**Contractor Mark-up**” refers to the percentage, as set forth in Exhibit C, Payment Provisions, used to calculate the amount charged by the Contractor for compensation of services rendered, which the COURT will pay in addition to a Salary Rate or Conversion Salary Rate as part of a Billing Rate, when billed for services rendered by an Assigned Personnel employed by the Contractor. The Contractor Mark-up will be the Contractor’s compensation for its services rendered under this Agreement.
- M. “**Conversion Fee**” refers to a fee, unallowable under this Agreement, which is associated with hiring a temporary employee from a temporary staffing agency prior to an agreed-upon duration.
- N. “**Conversion Period**” refers to an acceptable period of time, during which an Assigned Personnel must work, prior to accepting employment directly from the COURT. Conversion Period is set forth in Exhibit E, Description of Services; however, per agreement by the parties, a period at least equal to if not less than such period may be set forth in an Order as the Conversion Period.

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- O. **“Conversion Salary Rate”** refers to actual take-home hourly rate that the Contractor pays to Assigned Personnel for performing the work of an Assignment set forth in an Order, when such Assigned Personnel were converted to providing temporary services for the Contractor from the COURT’s previous temporary staffing agency. A Conversion Salary Rate is a component of the Billing Rate paid by the COURT for services rendered by the Contractor’s Assigned Personnel. A Conversion Salary Rate shall be in accordance with the appropriate Conversion Salary Rate, as set forth in Exhibit D, Schedules.
- P. **“Data”** means all types of raw data, articles, papers, charts, records, reports, studies, research, memoranda, computation sheets, questionnaires, surveys, and other documentation in written or electronic form.
- Q. **“Day”** means calendar day, unless otherwise specified.
- R. **“End Date”** refers to the date that the COURT anticipates as the last day of an Assignment. The End Date will be set forth in each authorized Order.
- S. **“Force Majeure”** means a delay which impacts the timely performance of work which neither the Contractor nor the COURT are liable for because such delay or failure to perform was unforeseeable and beyond the control of the party. Acts of Force Majeure include, but are not limited to:
- i. Acts of God or the public enemy;
  - ii. Acts or omissions of any government entity;
  - iii. Fire or other casualty for which a party is not responsible;
  - iv. Quarantine or epidemic;
  - v. Strike or defensive lockout; and,
  - vi. Unusually severe weather conditions.
- T. **“COURT Referral Mark-up”** refers to the percentage, as set forth in Exhibit C, Payment Provisions, used to calculate the amount charged by the Contractor for compensation of services rendered pursuant to an Order, which the COURT will pay in addition to a Salary Rate as part of a Billing Rate, when billed for services rendered by an Assigned Personnel who was referred to the Contractor for employment by the COURT. The COURT Referral Mark-up will be the Contractor’s compensation for its services rendered under this Agreement.
- U. **“Key Staff”** refers to the Contractor’s personnel named in Exhibit G, Contractor’s Key Staff, whom the COURT has identified and approved to function in a key capacity in managing the work of the Agreement.
- V. **“Agreement”** means the component of the Contract Documents that sets forth the terms and conditions under which the COURT retains the Contractor and the

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Contractor will provide temporary staffing services to the COURT, pursuant to authorized Orders.

- W. **“Material”** means all types of tangible personal property, including but not limited to goods, supplies, equipment, commodities, and information and telecommunication technology.
- X. **“NIC”** or **“Not Authorized in Contract”** refers to an item, so designated in this Agreement that is within scope of the Agreement, but not yet authorized. NIC items, upon agreement by the parties, will be incorporated into the Agreement via Amendment.
- Y. **“Notice”** means a written document initiated by the authorized representative of either party to this Agreement or Order and given by:
- i. Depositing in the U. S. Mail (or approved commercial express carrier) prepaid to the address of the appropriate authorized representative of the other party, which shall be effective upon date of receipt; or
  - ii. Hand-delivered to the other party’s authorized representative, which shall be effective on the date of service.
- Z. **“Order”** refers to an ordering document (e.g., work order(s) and purchase order), used by the COURT to authorize commencement of temporary personnel services from the Contractor, pursuant to this Agreement. A purchase order is used to place and fund associated work orders: the purchase order shall include a statement that the terms and conditions of this Agreement shall prevail over any purchase order terms and conditions, and any work order issued shall be substantially in the form of Form 3, Sample Work Order Template. The Order shall include the following, at a minimum:
- i. The Agreement Number;
  - ii. The Order Number;
  - iii. The name of the Assigned Personnel (listed as “Hire Name” on the Order);
  - iv. The name of the Reports To;
  - v. The Start Date and the End Date of the Assignment;
  - vi. The Work Location and the Work Schedule/Hours;
  - vii. A list of certifications that the Assigned Personnel may be required to obtain and maintain to perform the requested work;
  - viii. The Billing Rate;
  - ix. An estimated amount of charges for candidate background checks;
  - x. The estimated Travel Expenses, if applicable;
  - xi. The Classification;
  - xii. The Conversion Period, as applicable;
  - xiii. A description of the work to be performed by the Assigned Personnel; and



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- xiv. The Order Amount.
- AA. **“Order Amount”** refers to the amount of funds that is allocated by the COURT to an authorized Order for payment purposes. The amount that the COURT may reimburse the Contractor for work provided pursuant to each Order shall not exceed the Order Amount stated therein.
- BB. **“Order Number”** refers to the unique number given to each Order issued by the COURT pursuant to this Agreement.
- CC. **“Overtime Pay”** refers to the amount, based upon the Overtime Rate, the Contractor shall bill and the COURT will pay for allowable overtime work provided by an Assigned Personnel. The Reports To must authorize overtime work before Overtime Pay will be considered an allowable charge under an Order. The Contractor shall bill Overtime Pay, when applicable, without any mark-up, as an item separate from the appropriate Billing Rate.
- DD. **“Overtime Rate”** refers to the rate, as set forth in Exhibit C, Payment Provisions, used to calculate Overtime Pay, which the Contractor may bill and the COURT will pay, if the Assigned Personnel provided work within scope of the Order, in excess of a normal 8-hour work-day, when such overtime was pre-approved by the Reports To.
- EE. **“Pay Period”** means the time period (e.g. weekly, every two (2) weeks, twice a month, monthly, etc.) for which the Assigned Personnel receives payment on a regular basis from that Assigned Personnel’s employer for the work performed pursuant to an Order.
- FF. **“Salary Rate”** refers to the actual take-home hourly rate that the Contractor pays to its Assigned Personnel for performing the work of an Assignment set forth in the applicable Order (in other words, the rate reflected on the temporary employee’s paycheck). A Salary Rate is a component of the Billing Rate paid by the COURT for services rendered by the Contractor’s Assigned Personnel. A Salary Rate shall be in accordance with the appropriate Salary Rate, as set forth in Exhibit D, Schedules, or it shall be pursuant to an agreement, documented in writing by the parties in accordance with this Agreement, which shall be incorporated into Exhibit D, Schedules, via a subsequent Amendment to this Agreement.
- GG. **“Start Date”** refers to the date set forth in an Order that identifies when the Assigned Personnel shall begin performing the work described for an Assignment in the applicable Order.
- HH. **“Stop Work Order”** means the written Notice, delivered in accordance with this Agreement, by which a COURT may require the Contractor to stop all, or any part, of the work of an Order or by which the COURT may require the Contractor to stop all, or any part, of the work this Agreement, for the period set forth in the Stop Work

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Order. The Stop Work Order shall be specifically identified as such and shall indicate that it is issued pursuant to the Stop Work provision in this Exhibit.

- II. **“Subcontractor”** shall mean an individual, firm, partnership, or corporation having a contract, purchase order, or agreement with the Contractor, or with any Subcontractor of any tier for the performance of any part of the Agreement or Orders. For purposes of this Agreement and unless otherwise expressly stated, the term “Subcontractor” includes, at every level and/or tier, all subcontractors, sub-consultants, suppliers, and material men.
- JJ. **“Subcontractor Billing Rate”** refers to the gross hourly rate, prior to the deduction of any taxes, that the Contractor will bill the COURT and the COURT will pay the Contractor for the work performed for an Assignment by the Subcontractor’s Assigned Personnel pursuant to an Order issued under this Agreement. A Subcontractor Billing Rate is the amount the Contractor will pay the Subcontractor for work provided by the Subcontractor’s Assigned Personnel and includes the salary or pay rate, to be paid by the Subcontractor to the Assigned Personnel for performing the work set forth in an applicable Order, and the mark-up charges of the Subcontractor. A Subcontractor Billing Rate shall be in accordance with the appropriate Subcontractor Billing Rate, as set forth in Exhibit D, Schedules, or it shall be pursuant to an agreement, documented in writing by the parties in accordance with this Agreement, which shall be incorporated into Exhibit D, Schedules, via a subsequent Amendment to this Agreement.
- KK. **“Subcontractor Mark-up”** refers to the percentage, as set forth in Exhibit C, Payment Provisions, used to calculate the amount charged by the Contractor for compensation of services rendered pursuant to an Order, which the COURT will pay in addition to a Subcontractor Billing Rate when billed for services rendered by an Assigned Personnel employed by a Subcontractor. The Subcontractor Mark-up will be the Contractor’s compensation for its Subcontractor administration services rendered under this Agreement.
- LL. **“Time Sheet”** refers to the form that the parties use to track the number of hours worked by an Assigned Personnel. A Time Sheet shall be completed for each Pay Period. The Time Sheet must be approved by the Reports To, and the Assigned Personnel. Terms and conditions listed on Time Sheets shall not be binding to the parties of this Agreement or any Order.
- MM. **“To Be Determined”** or **“TBD”** listed herein to represent items that are to be proposed and/or negotiated, and therefore have not been identified or agreed upon in order to include in the contractual terms yet.
- NN. **“Travel Expense(s)”** shall mean necessary transportation, meals, lodging, and other travel related expenses, which are required of the Assigned Personnel to perform the work of an Assignment set forth in an Order, and which must be pre-approved in

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writing by the Reports To, prior to incurring such an expense. Travel Expense, for overnight travel, must be in accordance with the California Victim Compensation and Government Claims Board (formerly State Board of Control) guidelines as follows: (i) meals shall be reimbursed at the actual cost not to exceed **\$8.00** per Day for breakfast, **\$12.00** per Day for lunch, **\$20.00** per Day for dinner, and **\$6.00** per Day for incidentals; and (ii) hotel room rentals shall be reimbursed for the actual cost not to exceed **\$110.00** per Day, plus tax and energy surcharge when applicable, Additionally, Travel Expenses may also include necessary ground transportation, including the actual cost of public transportation and/or a rental car. The Court will reimburse Travel Expenses ground transportation usage at the applicable IRS-approved rate per mile.

- OO. **“Work Location”** refers to the physical location set forth in an Order that identifies where the Assigned Personnel shall report to perform the work of an Assignment.
- PP. **“Work Schedule”** refers to the days of the week and hours during which the Assigned Personnel will report to perform the work of an Assignment for an Order. The Work Schedule shall be set forth in the Order.

### 2. Manner of Performance

The Contractor shall complete all work specified in these Contract Documents to the COURT's satisfaction and in compliance with the nondiscrimination/no harassment clause, as set forth in this Exhibit.

### 3. Ordering

- A. Orders may vary in form and format, but may include a work order or work orders associated with a purchase order, which will reference this Agreement and shall state that the terms and conditions of this Agreement are applicable to the Order.
- B. COURT will be responsible for receipt and acceptance of services ordered and payment pursuant to the terms and conditions set forth in this Agreement.
- C. Any additional or supplemental terms contained in the Order or in any invoice or confirmation of the Order that conflict with or materially alter any term or condition of this Agreement as it relates to an Order will not be deemed part of such agreement.
- D. The COURT will be responsible for the receipt and acceptance of all work which that is ordered from the Contractor and for payment pursuant to the terms and conditions set forth in this Agreement.
- E. Each Order will include the name, address, and email of the COURT's contact person (“Order Project Manager”).

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- F. After an Order has been issued to the Contractor by the COURT, the Contractor shall provide acknowledgement of the Order, within one (1) business day of receipt. The acknowledgement shall be submitted by facsimile or email. The Order is not binding until the Contractor provides acknowledgement of the Order and COURT authorizes the Order.
  - G. The COURT does not guarantee that the Contractor will receive a specific volume of work, a specific total Order Amount, or a specific total amount under this Agreement. Additionally, there will be no limit on the number of Orders the COURT may issue under this Agreement, nor will there be any specific limitation on the quantity, minimum or maximum value of individual Orders.
4. Termination Other Than for Cause
- A. In addition to termination for cause under Exhibit A, Standard Provisions, paragraph 3, the COURT may terminate the Agreement in whole or in part, at any time upon providing the Contractor written Notice at least ten (10) Days before the effective date of termination. Upon receipt of the termination Notice, the Contractor shall promptly discontinue all services affected unless the Notice specifies otherwise.
  - B. In the event an Assignment is terminated, but neither the Order that authorized that Assignment nor the Agreement is terminated in whole or in part, such termination shall be conducted in accordance with Exhibit E, Description of Services, paragraph 8, Termination of Assignment and Conversion.
  - C. If COURT terminates all or a portion of an Order other than for cause, the COURT shall pay the Contractor for the fair value of satisfactory services rendered before the termination, not to exceed the total Order Amount.
5. \* Participating JBE's Obligation Subject to Availability of Funds
- A. COURTS obligation under this Agreement is subject to the availability of authorized funds. The COURT may terminate an Order in whole or in part, without prejudice to any right or remedy for lack of appropriation of funds. If expected or actual funding is withdrawn, reduced, or limited in any way prior to the expiration date set forth in the Order, or in any Amendment thereto, the COURT may terminate the Order, in whole or in part, upon written Notice to the Contractor. Such termination shall be in addition to the COURT'S rights to terminate for convenience or default.
  - B. Payment shall not exceed the amount allowable for appropriation by Legislature. If an Order or the Agreement is terminated for non-appropriation:
    - i. The COURT will be liable only for payment in accordance with the terms of this Agreement for services rendered prior to the effective date of termination; and

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- ii. The Contractor shall be released from any obligation to provide further services pursuant to the Order or this Agreement as are affected by the termination.
  - C. Funding for an Order under this Agreement beyond the current appropriation year is conditional upon appropriation by the Legislature of sufficient funds to support the activities described in an Order or this Agreement. Should such an appropriation not be approved, an Order may terminate at the close of the current appropriation year. The appropriation year ends on June 30 of each year.
- 6. Stop Work
  - A. The COURT may, at any time by written Notice as a Stop Work Order to the Contractor, require the Contractor to stop all, or any part, of the work of an Order or of this Master Agreement, for a period up to ninety (90) Days after the Notice is delivered to the Contractor, and for any further period to which the parties may agree. The Stop Work Order shall be specifically identified as such and shall indicate it is issued under this provision. Upon receipt of the Stop Work Order, the Contractor shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the work covered by the Stop Work Order during the period of work stoppage. Within a period of ninety (90) Days after a Stop Work Order is delivered to the Contractor, or within any extension of that period to which the parties shall have agreed, the State shall either:
    - i. Cancel the Stop Work Order; or
    - ii. Terminate the work covered by the Stop Work Order as provided for in one of the termination provisions of this Agreement.
  - B. If a Stop Work Order issued under this provision is canceled or the period of the Stop Work Order or any extension thereof expires, the Contractor shall resume work. The COURT shall make an equitable adjustment in the delivery schedule and/or the Order Amount, and the Agreement shall be modified, in writing, accordingly, if:
    - i. The Stop Work Order results in an increase in the time required for, or in the Contractor's cost properly allocable to the performance of any part of the Order or of this Agreement; and
    - ii. The Contractor asserts its right to an equitable adjustment within thirty (30) Days after the end of the period of work stoppage; however, if the COURT decides the facts justify the action, the COURT may receive and act upon a proposal submitted at any time before final payment under the Order.
  - C. If a Stop Work Order is not canceled and the work covered by the Stop Work Order is terminated in accordance with the Termination Other Than For Cause provision or the COURT's Obligation Subject to Availability of Funds provision, as set forth under

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this Exhibit, shall allow reasonable costs resulting from the Stop Work Order in arriving at the termination settlement.

- D. The COURT shall not be liable to the Contractor for loss of profits because of the Stop Work Order issued under this provision.

### 7. Agreement Administration/Communication

#### A. COURT Program Manager.

- i. The responsibilities of the COURT Program Manager include but are not limited to the following:
- a. Acts as a liaison between the Contractor and the COURT pertaining to programmatic issues and the Agreement;
  - b. Proactively assists with resolution of issues; and
  - c. Monitors and evaluates the Contractor's performance.
  - d. Acts as a liaison between the Contractor and the COURT, serving as the contact to whom the Contractor shall make all requests and other communications about the Order, including payment status;
  - e. Requests staffing for Assignments from the Contractor;
  - f. Facilitates candidate selection and Order process on behalf of the COURT;
  - g. Proactively assists with resolution of issues; and
  - h. Monitors and evaluates the Contractor's performance.

#### B. Reports To.

- i. Each work order will identify the COURT's representative to function in the role of Reports To. The responsibilities of the Reports To include but are not limited to the following:
- a. Representative is currently in a supervisory or manager COURT classification;
  - b. Assists with the candidate selection process;
  - c. Communicates work requirements to Assigned Personnel;
  - d. Pre-approves any travel or overtime by the Assigned Personnel, prior to incurring any expenses; and
  - e. Provides for the day-to-day supervision of Assigned Personnel's work.

#### C. Hiring Manager.

- i. Each work order will identify a Hiring Manager. The responsibilities of the Hiring Manager include but are not limited to the following:

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- a. Assists with the candidate selection process; and
- b. Manages the requesting unit in which the Assigned Personnel works.

D. Account Manager.

- i. Exhibit G, Contractor's Key Staff, includes identification and resume(s) of the Key Staff.
- ii. The responsibilities of the Account Manager (Key Staff) include but are not limited to the following:
  - a. Responsible for end-results and day-to-day project management;
  - b. Serves as the Contractor's primary contact for the COURT;
  - c. Works closely with the COURT Program Manager;
  - d. Responsible for managing requests for Assignments;
  - e. Facilitates Ordering process on behalf of the Contractor;
  - f. Provides monthly temporary staffing and budget reports; and
  - g. Proactively assists with resolution of issues.

E. Designees.

Any designees shall be set forth in writing for the benefit of the other party.

F. Notices.

Any Notice from the Contractor to the COURT shall be in writing and shall be delivered as follows:

Ventura Superior Court  
Finance and Planning Division  
800 South Victoria Avenue  
Ventura, CA 93009

8. Contractor's And Subcontractor's Personnel Are Not Employees of the COURT's

- A. The Contractor and any Subcontractors, in performance of this Agreement, are acting as independent contractors. Personnel supplied by the Contractor or any Subcontractors, hereunder, are not COURT employees, but are the responsibility to the extent described in this Agreement, of the Contractor or Subcontractor, as applicable, in terms of employment, and the payment of compensation, including all federal, state, and local taxes, charges, fees, applicable city ordinances or contributions required to be paid to their employees, including all Assigned Personnel that provide service or perform work hereunder. The COURT shall not be responsible for payment of Workers' Compensation, Medicare, medical, social

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security, disability or other similar benefits provided by Contractor or any Subcontractors, unemployment or other similar insurance or for withholding income or other taxes of any type for any Contractor or Subcontractor employee, including all Assigned Personnel.

- B. The Contractor, or Subcontractor, as applicable, shall require Assigned Personnel to sign an acknowledgement form that specifically states that the Assigned Personnel is an “at will” employee of that Contractor or Subcontractor.
- C. The Contractor shall inform all Assigned Personnel providing temporary services to COURT, pursuant to an Order under this Agreement, that they are not entitled to the provision of any California State employee benefit.
- D. If the Internal Revenue Service or any other federal or state governmental agency should inquire about, question, or challenge the employee status of Assigned Personnel providing temporary services pursuant to this Agreement, the parties agree that: (i) each shall inform the other party of such inquiry or challenge; and (ii) the COURT shall have the right to participate in any discussion or negotiation occurring with the federal or state agency, without regard to who initiated such discussions or negotiations. In the event the federal or state agency concludes that an employee-employer relationship does not exist between the Assigned Personnel and the Contractor or Subcontractor, as the case may be, the COURT or the Contractor may terminate the Order immediately upon written Notice.

### 9. Temporary Services/Temporary Leasing Employer Status

- A. Upon execution of this Agreement, the Contractor represents and warrants that it is a “temporary services employer” and/or an “employee leasing employer,” as defined in Section 606.5 of the California Unemployment Insurance Code, and that it performs ALL of the following functions in connection therewith:
  - i. Negotiates with clients or customers for such matters as time, place, type of work, working conditions, quality, and price of the services;
  - ii. Determines assignments or reassignments of workers, even though workers retain the right to refuse specific assignments;
  - iii. Retains the authority to assign or reassign a worker to other clients or customers when a worker is determined unacceptable by a specific client or customer;
  - iv. Assigns or reassigns the worker to perform services for a client or customer;
  - v. Sets the rate of pay of the worker, whether or not through negotiations;
  - vi. Pays the worker from its own account or accounts; and
  - vii. Retains the right to hire and terminate workers.
- B. The Contractor further agrees to continue performing all such functions for the term of this Agreement.



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10. Subcontracting

The Contractor shall not subcontract any portion of an Order under this Agreement, pursuant to individual Orders, unless COURT agrees to the subcontracting in writing. The Contractor shall require each Subcontractor to comply with the provisions of this Agreement. No party to this Agreement or any Order shall in any way contract on behalf of or in the name of another party to this Agreement or any Order.

11. COURT's Responsibilities

- A. The COURT agrees to discuss all matters concerning the Assigned Personnel with the Contractor, including, but not limited to, employment, job duties/Assignments, and pay rates/procedures.
- B. The COURT shall provide a Reports To, access to all documents, Materials, and Data that may be necessary for the Assigned Personnel to perform the work of an applicable Order.
- C. All work to be performed by the Assigned Personnel will be performed on the COURT's premises, unless otherwise expressly set forth in an Order.
- D. The COURT agrees to promptly communicate with the Contractor any alleged (i) violation(s) of health or safety requirements; (ii) accidents and/or injuries; and (iii) claims of harassment or discrimination involving Assigned Personnel providing service(s) pursuant to this Agreement.

12. Services Warranty and First Day Guarantee of Assigned Personnel

- A. The Contractor warrants and represents that each of its employees, independent contractors or agents, including Key Staff and Assigned Personnel, assigned to perform any service, provide work or provide any technical assistance under the terms of this Agreement shall have the skills, training, and background reasonably commensurate with his or her level of performance or responsibility, so as to be able to perform in a competent and professional manner. The Contractor further warrants that the service provided hereunder will conform to the requirements of this Agreement. All warranties, including any special warranties specified elsewhere herein, shall inure to the State, its successors, assigns, and any other recipients of the services and work provided hereunder.
- B. The COURT must be completely satisfied with the performance of the Assigned Personnel. If the COURT is for any reason not satisfied with the performance of the Assigned Personnel on the first day that the Assigned Personnel reports to perform the work set forth in the applicable Order, the State may contact the Contractor via electronic mail, telephone or facsimile, following up with a Notice within five (5) Days, and the Contractor will remove the Assigned Personnel from the Assignment

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pursuant to Exhibit E, Description of Services, paragraph 8, Termination of Assignment and Conversion, and credit the State all charges and fees for the first day or any portion thereof.

### 13. Dispute Resolution

#### A. Informal Resolution:

- i. Contractor and the COURT will attempt, in good faith, to resolve informally any disputes under this Agreement or an Order. If the dispute involves this Agreement or the Order, Contractor shall meet with the COURT Program Manager to discuss the matter and any actions necessary to resolve the dispute informally
- ii. If the Order Project Manager and Contractor are unable to resolve an Order dispute, then the Finance and Planning Office Director (or equivalent) and Contractor shall meet to discuss the matter and any actions necessary to resolve the dispute informally.

#### B. Escalation:

- i. If the dispute is not resolved informally by meeting, then either party to the dispute may issue a written Notice of dispute to the other party to the dispute. Following the issue of such Notice, each party's designated representative will meet to exchange information and attempt resolution within fifteen (15) days of receipt of such Notice. Any written notice of dispute shall include a copy to the COURT Program Manager.
- ii. If the matter is not resolved as set forth above, the aggrieved party will submit a second written Notice to the other party to the dispute which will: (a) provide detailed factual information; (b) identify the specific provisions in the Agreement or Order, as applicable, on which any demand is based; (c) advise if the demand involves a cost adjustment and, if so, provide the exact amount, accompanied by all supporting records; and (d) attach a declaration that the demand is made in good faith, the supporting data are accurate and complete, and the amount requested properly reflects the necessary adjustment. Notice must be signed by an authorized representative of the aggrieved party. The Court Executive Officer or another member of the executive management team will submit the second written Notice to Contractor. Any written notice of dispute shall include a copy to the COURT Program Manager.
- iii. Each party to the dispute will comply with reasonable requests for additional information. Any additional information will be provided to the requesting

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party within fifteen (15) business days after receipt of a written request from the requesting party, unless otherwise agreed.

- C. Confidentiality during Dispute Resolution: All dispute resolution negotiations are considered confidential, and will be treated as compromise and settlement negotiations, to which California Evidence Code Section 1152 applies.
- D. Performance during Dispute Resolution: Pending final resolution of any dispute, Contractor agrees to proceed diligently with the performance of the work, including any work under dispute, unless otherwise directed. Contractor's failure to diligently proceed with the work will be considered a material breach of the Agreement.

### 14. Insurance Requirements

- A. General. The Contractor shall obtain and maintain the minimum insurance set forth in subparagraph B, below. By requiring such minimum insurance, the COURT shall not be deemed or construed to have assessed the risks that may be applicable to the Contractor under this Agreement. The Contractor shall assess its own risks and if it deems appropriate and/or prudent, maintain greater limits and/or broader coverage. For full coverage, each insurance policy shall be written on an "occurrence" form; excepting that insurance for professional liability, when required, may be acceptable on a "claims made" form. If coverage is approved and purchased on a "claims made" basis, the Contractor warrants continuation of coverage, either through policy renewals or the purchase of an extended discovery period, if such extended coverage is available, for not less than three (3) years from the date of completion of the work which is the subject of this Agreement.
- B. Minimum Scope and Limits of Insurance. The Contractor shall maintain insurance that covers the Contractor and the Assigned Personnel employed by the Contractor with limits no less than the following:
  - i. Workers' Compensation at statutory requirements of the State of residency.
  - ii. Employers' Liability insurance shall not be less than **\$1,000,000.00** for injury or death for each occurrence.
  - iii. Comprehensive General Liability Insurance shall be at least as broad as the Insurance Services Office (ISO) Commercial General Liability Coverage "occurrence" form, with no coverage deletions. The limit shall not be less than **\$1,000,000.00** for each occurrence / **\$2,000,000.00** aggregate for bodily injury, property damage and personal injury. Coverage shall be:
    - (a) by "Additional Insured" endorsement add as insureds the COURT, their agents, and employees with respect to liability arising out of or connected with the service provided. In the event the

## ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS

Commercial General Liability policy includes a “blanket endorsement by contract,” the following language added to the certificate of insurance will satisfy the COURT’s additional insured requirement: “The COURT, their directors, agents and employees with respect to liability arising out of the work performed by or for the Contractor are additional insureds under a blanket endorsement”; and

(b) endorsed to specify that the Contractor’s insurance is primary and that any insurance or self-insurance maintained by the COURT shall not contribute with it.

- iv. Business Automobile Liability Insurance coverage shall be at least as broad as the ISO Business Auto Coverage form covering Automobile Liability, code 1 “any auto.” The limit shall not be less than **\$1,000,000.00** each accident for bodily injury and property damage.
- C. Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions must be declared to, and approved by, the COURT. The deductible and/or self-insured retention of the policies shall not limit or apply to the Contractor’s liability to the State and shall be the sole responsibility of the Contractor.
- D. Other Insurance Provisions.
  - i. The General Liability policy required in this Agreement is to contain, or be endorsed to contain, the following provisions:
    - (a) To the extent of the Contractor’s negligence, the Contractor’s insurance coverage shall be primary insurance as respects the COURT, their officers, officials, employees and agents. Any insurance and/or self-insurance maintained by the COURT, their officers, officials, employees or agents shall not contribute with the insurance or benefit the Contractor in any way; and
    - (b) The Contractor’s insurance shall apply separately to each insured against whom a claim is made and/or lawsuit is brought, except with respect to the limits of the insurer’s liability.
  - ii. In the event the Contractor will provide attorney, architectural, engineering, or other professional services, which require a “standard of care” against negligent acts, the Contractor will also maintain Professional Liability insurance, which covers the work provided by the Assigned Personnel, at not less than \$1,000,000.00 per claims made.

## **ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS**

- E. Upon the COURT's request, the Contractor shall provide the COURT certificates of insurance satisfactory to the COURT evidencing all required coverages before Contractor begins any work under this Agreement, and complete copies of each policy.
- F. Subcontractors. The Contractor shall include any Subcontractors, including its Assigned Personnel, as insured under its policies, or shall furnish separate certificates of insurance and policy endorsements for each Subcontractor. Insurance coverage, provided by Subcontractors as evidence of compliance with the insurance requirements of this Agreement, shall be subject to all of the requirements stated herein.
- G. If at any time the foregoing policies shall be or become unsatisfactory to the COURT, as to form or substance, or if a company issuing any such policy shall be or become unsatisfactory to the COURT, the Contractor shall, upon Notice to that effect from the COURT, promptly obtain a new policy, and shall submit the same to the COURT, with the appropriate certificates and endorsements, for approval.
- H. All of the Contractor's policies shall be endorsed to provide advanced written Notice to the COURT of cancellation, nonrenewal, and reduction in coverage, within fifteen (15) Days, mailed to the following address: Ventura Superior Court, Fiscal Department, P.O. Box 6489, Ventura, CA 93006-6489.

### 15. Confidentiality

- A. The Contractor agrees not to disclose Confidential Information to any third party and to treat it with the same degree of care as it would its own confidential information. It is understood, however, that the Contractor may disclose the COURT's Confidential Information on a "need to know" basis to the Contractor's employees and Subcontractors performing services for the COURT. The Contractor shall direct all Assigned Personnel to execute a Temporary Services Employee Agreement, in the form of Form A, prior to commencing work on the Assignment requiring a promise of confidentiality concerning the Confidential Information. All Confidential Information shall remain the exclusive property of the party disclosing such information.
- B. The Contractor shall acquire no right or title to the Confidential Information. The Contractor agrees not to use the Confidential Information for any purpose except as contemplated pursuant to this Agreement. Notwithstanding the foregoing, the Contractor may disclose the Confidential Information (i) to the extent necessary to comply with any law, rule, regulation or ruling applicable to it; (ii) as appropriate to respond to any summons or subpoena applicable to it; or (iii) to the extent necessary to enforce its rights under this Agreement.

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### 16. Copyrights, Ownership and Intellectual Property

- A. Copyrights and Rights in Data: All copyrights and rights in the Data produced with funding from Orders under this Agreement that may presumptively vest in the Contractor shall be transferred to the COURT.
- B. Ownership of Results: Any interest of the Contractor in Data in any form, or other documents and/or recordings prepared by the Contractor during the provision of service or the performance of work under this Agreement shall become the property of the COURT. Upon written request, the Contractor shall provide the COURT with all this Data within thirty (30) Days of the request.
- C. Ownership of Intellectual Property, etc.:
  - i. The Contractor agrees that (a) all documents, deliverables, software, systems designs, disks, tapes, CDs and any other Data or Materials created in whole or in part by the Contractor or its personnel in the course of or related to the provision of service or the performance of work for the COURT shall be treated as if it were “work for hire”, and (b) the Contractor will immediately disclose to the State all discoveries, inventions, enhancements, improvements, and similar creations (collectively, “**Creations**”) made, in whole or in part, by the Contractor or its personnel in the course of or related to providing services or work.
  - ii. All ownership and control of the above Data, Materials, and Creations, including any copyright, patent rights, and all other intellectual property rights therein, shall vest exclusively with the COURT, and the Contractor hereby assigns all right, title, and interest that the Contractor may have in such Data, Materials, and Creations to the COURT, without any additional compensation and free of all liens and encumbrances of any type.

### 17. Limitation on Publication

The Contractor shall not publish or submit for publication any article, press release, or other writing relating to the service provided or the work performed pursuant to the Contract without prior review and written permission by the COURT. The COURT review shall be completed within thirty (30) Days of submission to the COURT Program Manager and, if permission is denied, the COURT shall provide its reasons for denial in writing.

### 18. Replacement of Contractor's Personnel

- A. Replacement of Key Staff.
  - i. The COURT has the right to review resumes and interview the Contractor's proposed Key Staff provided to the COURT under this Agreement prior to

## **ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS**

commencement of the work. If, in the COURT's reasonable opinion, the proposed Key Staff is unsatisfactory or does not meet the COURT's requirements, the Contractor shall submit a different candidate for consideration.

- ii. The Contractor's Key Staff will have the ability and authority to make decisions commensurate with his or her role and level of responsibility regarding the work of this Agreement.
- iii. Exhibit G, Contractor's Key Staff, includes the individual(s) assigned as the Key Staff at the time of agreement, as well as the corresponding resume(s) that demonstrate pertinent qualifications. Any revision to the individual(s) identified as Key Staff must be approved in writing, as set forth in the Changes and Amendments provision of this Exhibit.
- iv. The Contractor shall endeavor to retain the same individuals during the performance of the work of this Agreement. If the Contractor's Key Staff become unavailable during the term of this Agreement, the Contractor will supply a substitute acceptable to the State.
- v. The State reserves the right to disapprove the continuing assignment of the Contractor's Key Staff provided to the COURT under this Agreement, if in the COURT's opinion, the performance of the Contractor's Key Staff is unsatisfactory. If the COURT exercises this right and approves a replacement candidate, the Contractor shall immediately, within a commercially reasonable time, assign the replacement personnel, possessing equivalent or greater experience and skills.
- vi. If the Contractor's Key Staff become unavailable and the Contractor cannot furnish a substitute acceptable to the COURT, the COURT may terminate this Agreement for cause pursuant to Standard Provisions, paragraph 3, as set forth in Exhibit A.

### **B. Replacement of Assigned Personnel.**

- i. If COURT requests that the Contractor remove Assigned Personnel pursuant to Exhibit E, Description of Services, paragraph 8, Termination of Assignment and Conversion, the COURT may, at its sole option, request that the Contractor provide a replacement candidate. If COURT makes such a request, the Contractor shall submit a response to the COURT's request as soon as practicable. The Contractor's response will include resumes of the qualified candidates. In no event will the Contractor require more than ten (10) business days to submit such a response, unless the parties have agreed to an extended time period.

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- ii. If the Contractor identifies a replacement candidate that meets the COURT's requirements and the COURT agrees the COURT may, at its sole option, either amend the Order to reflect the change in Assigned Personnel or issue a new Order.
- iii. In the event the COURT does not agree to a replacement candidate and the Contractor is unable to find another suitable candidate, the COURT may terminate the Order, in accordance with this Exhibit's paragraph 4, Termination Other Than for Cause. Upon the effective date of termination of the Order, the Contractor will not be obligated to complete the work of that Order.

19. Changes and Amendments

- A. Changes or Amendments to any component of the Agreement can be made only with prior written approval from the COURT. Changes or Amendments to any component of an Order can be made only with prior written approval from the Order Project Manager. Requests for changes or Amendments must be submitted in writing and must be accompanied by a narrative description of the proposed change and the reasons for the change. Additional funds may not be encumbered under an Order to this Agreement due to an act of Force Majeure, although the performance period may be amended due to an act of Force Majeure. After review of the request by the COURT, a written decision shall be provided to the Contractor. Amendments to the Agreement shall be authorized only via bilateral execution of a COURT Standard Amendment Coversheet form.
- B. The terms of this Agreement shall not be amended or changed by the terms of any Order, any purchase order, invoice, Time Sheet or any other type of document even though the COURT may have accepted or signed such documents. No failure or delay by a party in exercising any right, power or remedy with respect to any of its rights hereunder shall operate as a waiver thereof.

20. \* Accounting System Requirement

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

21. Retention of Records

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



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22. \* Audit

The Contractor shall permit the authorized representative(s) of the COURT or Bureau of State Audits, or their designees, to inspect or audit all Data relating to performance and billing to the COURT under this Agreement at any reasonable time. The Contractor further agrees to maintain such Data for a period of four (4) years after final payment under an Order of this Agreement.

23. Drug-Free Workplace

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

24. Conflict of Interest

The Contractor will not knowingly violate the conflict of interest principles set forth below:

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

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

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

25. Covenant Against Gratuities

The Contractor warrants by signing this Agreement that no gratuities, in the form of entertainment, gifts, or otherwise, were offered by the Contractor or any agent, director, or representative of the Contractor, to any officer, official, agent, or employee of the COURT

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with a view toward securing the agreement or securing favorable treatment with respect to any determinations concerning the performance of the agreement. For breach or violation of this warranty, the COURT will have the right to terminate the Agreement, either in whole or in part, and any loss or damage sustained by the COURT in procuring, on the open market, any items which the Contractor agreed to supply, shall be borne and paid for by the Contractor. The rights and remedies of the COURT provided in this provision shall not be exclusive and are in addition to any other rights and remedies provided by law or under the Agreement.

26. Non-Exclusivity

This is a non-exclusive agreement. The COURT reserve the right to perform, or have others perform the work of this Agreement. The COURT reserves the right to bid the work to others or procure the work by other means.

27. Permits and Licenses

The Contractor shall observe and comply with all federal, state, city, and county laws, rules, and regulations affecting services and performance of work under this Agreement. The Contractor shall ensure that any and all certifications, permits and/or licenses that may be required of the Contractor for a specific Order are obtained and maintained in full force and effect during performance of the work requested in the Order. The State will provide a list of all such certifications, permits and licenses in the individual Order.

28. California Law

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

29. Severability

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

30. Waiver

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

31. Signature Authority

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The parties signing this Agreement and any subsequent Order certify that they have proper authorization to do so.

32. Survival

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

33. Evaluation of Contractor

The COURT shall evaluate the Contractor's performance under this Agreement.

34. Agreement Term

- A. The Agreement shall commence and expire in accordance with the dates set forth on the executed COURT Standard Agreement Coversheet. This Agreement is of no force and effect until signed by both parties and all approvals are secured. Any commencement of performance prior to Agreement approval shall be done so at the Contractor's own risk. Additionally, any commencement of performance prior to the issuance of an authorized Order shall be done so at the Contractor's own risk.
- B. The parties agree that the COURT may elect to extend the initial term of this Agreement for up to two (2) optional consecutive one-year terms at the rates and the terms and conditions set forth in Exhibit C, Payment Provisions, and Exhibit D, Schedules.
- C. The possible terms of this Agreement are defined as follows:
  - i. July 1, 2014 through June 30, 2017 shall also be identified as the “**Initial Term.**”
  - ii. July 1, 2017 through June 30, 2018 shall also be identified as the “**First Option Term.**”
  - iii. July 1, 2018 through June 30, 2019 shall also be identified as the “**Second Option Term.**”

35. Judicial Branch Contracting Law Provisions

The Judicial Branch Contracting Law (JBCL) provisions are required for compliance with Public Contract Code (“PCC”), part 2.5, enacted under Senate Bill 78 (Stats. 2011, ch. 10), and the Judicial Branch Contracting Manual (“JBCM”) adopted pursuant to that law.

## ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS

- A. **Contractor Certification Clauses.** Contractor certifies that the following representations and warranties are true, and shall cause these representations and warranties to remain true during the term of this Agreement. Contractor shall promptly notify the COURT if any representation and warranty becomes untrue.
- i. **\*Non-discrimination.** Contractor complies with the federal Americans with Disabilities Act (42 U.S.C. 12101 et seq.), and California's Fair Employment and Housing Act (Government Code section 12990 et seq.) and associated regulations (Code of Regulations, title 2, section 7285 et seq.). Contractor does not unlawfully discriminate against any employee or applicant for employment because of age (40 and over), ancestry, color, creed, disability (mental or physical) including HIV and AIDS, marital or domestic partner status, medical condition (including cancer and genetic characteristics), national origin, race, religion, request for family and medical care leave, sex (including gender and gender identity), and sexual orientation. Contractor has notified in writing each labor organization with which Contractor has a collective bargaining or other agreement of Contractor's obligations of non-discrimination.
  - ii. **\*National Labor Relations Board.** No more than one, final unappealable finding of contempt of court by a federal court has been issued against Contractor within the immediately preceding two-year period because of Contractor's failure to comply with an order of a federal court requiring Contractor to comply with an order of the National Labor Relations Board. Contractor swears under penalty of perjury that this representation is true.
  - iii. **\*Not an Expatriate Corporation.** Contractor is not an expatriate corporation or subsidiary of an expatriate corporation within the meaning of PCC 10286.1, and is eligible to contract with the COURT.
- B. **Provisions Applicable Only to Certain Agreements.** The provisions in this section are *applicable only to the types of agreements specified in the title of each subsection*. If the agreement is not of the type described in the title of a subsection, then that subsection does not apply to the agreement.
- i. **Agreements over \$10,000.** This Agreement, including Orders, is subject to examinations and audit by the State Auditor for a period of three years after final payment.
  - ii. **Agreements over \$50,000.** No funds received under this Agreement or any Order will be used to assist, promote or deter union organizing during the term of this Agreement (including Order or any extension or renewal term).
  - iii. **Agreements of \$100,000 or More.** Contractor certifies that it is, and will remain for the term of the Agreement, in compliance with PCC 10295.3, which places limitations on contracts with contractors who discriminate in the

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provision of benefits regarding marital or domestic partner status. Contractor recognizes the importance of child and family support obligations and fully complies with (and will continue to comply with during the term of this Agreement) all applicable state and federal laws relating to child and family support enforcement, including, but not limited to, disclosure of information and compliance with earnings assignment orders, as provided in Family Code section 5200 et seq. Contractor provides the names of all new employees to the New Hire Registry maintained by the California Employment Development Department.

- iv. **Agreements for Services over \$200,000 (Excluding consulting services).** Contractor shall give priority consideration in filling vacancies in positions funded by Orders under this Agreement to qualified recipients of aid under Welfare & Institutions Code section 11200 and PCC 10353.
- v. **Agreements of \$1,000,000 or More.** Contractor certifies either (i) it is not on the current list of persons engaged in investment activities in Iran (“Iran List”) created by the California Department of General Services pursuant to PCC 2203(b), and is not a financial institution extending \$20,000,000 or more in credit to another person, for forty-five (45) days or more, if that other person will use the credit to provide goods or services in the energy sector in Iran and is identified on the Iran List, or (ii) it has received written permission from the COURT to enter into this Agreement pursuant to PCC 2203(c).
- vi. **Agreements for the Purchase of Goods.** Contractor shall not sell or use any article or product as a “loss leader” as defined in Business and Professions Code section 17030.
- vii. **Agreements for the Purchase of Certain Goods, and Printing, Parts Cleaning, Janitorial, and Building Maintenance Services Agreements.** If Contractor will sell to COURT, goods specified in PCC 12207 (for example, certain paper products, office supplies, mulch, glass products, lubricating oils, plastic products, paint, antifreeze, tires and tire-derived products, and metal products), then with respect to those goods: (i) Contractor shall use recycled products in the performance of an Order under this Agreement to the maximum extent doing so is economically feasible, and (ii) upon request, Contractor shall certify in writing under penalty of perjury, the minimum, if not exact, percentage of post consumer material as defined in the PCC 12200, in such goods regardless of whether the goods meet the requirements of PCC 12209. With respect to printer or duplication cartridges that comply with the requirements of PCC 12156(e), the certification required by this subdivision shall specify that the cartridges so comply.
- viii. **Agreements for Furnishing Equipment, Materials, Supplies, or for Laundering Services.** Contractor certifies that no apparel, garments or

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corresponding accessories, equipment, materials, or supplies furnished to COURT under an Order of this Agreement have been laundered or produced in whole or in part by sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor, or with the benefit of sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor. Contractor adheres to the Sweatfree Code of Conduct as set forth on the California Department of Industrial Relations website located at [www.dir.ca.gov](http://www.dir.ca.gov), and PCC 6108. Contractor agrees to cooperate fully in providing reasonable access to Contractor's records, documents, agents, and employees, and premises if reasonably required by authorized officials of the Department of Industrial Relations, or the Department of Justice to determine Contractor's compliance with the requirements under this section and shall provide the same rights of access to the COURT.

- ix. **Agreements for which Contractor Has Committed to Achieve DVBE Participation.** Contractor shall within sixty (60) days of receiving final payment under an Order of this Agreement certify in a report to the COURT: (i) the total amount the prime Contractor received under the Order of this Agreement; (ii) the name and address of any disabled veterans business enterprise ("DVBE") that participated in the performance of the Order; (iii) the amount each DVBE received from the Contractor; (iv) that all payments under an Order of this Agreement have been made to the DVBE; and (v) the actual percentage of DVBE participation that was achieved. A person or entity that knowingly provides false information shall be subject to a civil penalty for each violation.
- x. **Agreements Resulting from Competitive Solicitations.** Contractor shall assign to the COURT all rights, title, and interest in and to all causes of action it may have under Section 4 of the Clayton Act (15 U.S.C. Sec. 15) or under the Cartwright Act (Chapter 2 (commencing with Section 16700) of Part 2 of Division 7 of the Business and Professions Code), arising from purchases of goods, materials, or services by Contractor for sale to COURT. Such assignment shall be made and become effective at the time the COURT tenders final payment to the Contractor. If the COURT receives, either through judgment or settlement, a monetary recovery for a cause of action assigned under this section, the Contractor shall be entitled to receive reimbursement for actual legal costs incurred and may, upon demand, recover from the COURT any portion of the recovery, including treble damages, attributable to overcharges that were paid by the Contractor but were not paid by the COURT as part of the bid price, less the expenses incurred in obtaining that portion of the recovery. Upon demand in writing by the Contractor, the COURT shall, within one year from such demand, reassign the cause of action assigned under this part if the Contractor has been or may have been injured

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by the violation of law for which the cause of action arose and (a) the COURT has not been injured thereby, or (b) the COURT declines to file a court action for the cause of action.

- xi. **Agreements for Legal Services.** Contractor shall: (i) adhere to legal cost and billing guidelines designated by the COURT; (ii) adhere to litigation plans designated by the COURT, if applicable; (iii) adhere to case phasing of activities designated by the COURT, if applicable; (iv) submit and adhere to legal budgets as designated by the COURT; (v) maintain legal malpractice insurance in an amount not less than the amount designated by the COURT; and (vi) submit to legal bill audits and law firm audits if so requested by the COURT, whether conducted by employees or designees of the COURT or by any legal cost-control provider retained by the COURT for that purpose. Contractor may be required to submit to a legal cost and utilization review as determined by the COURT. If (a) the value of this agreement is greater than \$50,000, (b) the legal services are not the legal representation of low- or middle-income persons, in either civil, criminal, or administrative matters, and (c) the legal services are to be performed within California, then Contractor agrees to make a good faith effort to provide a minimum number of hours of pro bono legal services during each year of the agreement equal to the lesser of either (A) thirty (30) multiplied by the number of full time attorneys in the firm's offices in California, with the number of hours prorated on an actual day basis for any period of less than a full year or (B) the number of hours equal to ten percent (10%) of the contract amount divided by the average billing rate of the firm. Failure to make a good faith effort may be cause for non-renewal of the agreement or another judicial branch or other state contract for legal services, and may be taken into account when determining the award of future contracts with a judicial branch entity for legal services.
- xii. **Agreements Allowing for Reimbursement of Contractor's Costs.** Contractor must include with any request for reimbursement from the COURT a certification that the Contractor is not seeking reimbursement for costs incurred to assist, promote, or deter union organizing. If Contractor incurs costs or makes expenditures to assist, promote or deter union organizing, Contractor will maintain records sufficient to show that no reimbursement from the COURT was sought for these costs, and Contractor will provide those records to the Attorney General upon request.
- xiii. **Agreements Performed in California by Contractors that are Corporations, LLCs, or LPs.** Contractor is, and will remain for the term of the Agreement, qualified to do business and in good standing in California.
- xiv. **Agreements that the COURT Cannot Terminate for Convenience.** The COURT's obligations under Orders of this Agreement are subject to the availability of applicable funds. Expected or actual funding may be

## **ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS**

withdrawn, reduced, or limited prior to the expiration or other termination of an Order of this Agreement. Funding beyond the initial appropriation year is conditioned upon appropriation of sufficient funds to support the activities described in an Order of this Agreement. Upon notice, the COURT may terminate an Order, in whole or in part, without prejudice to any right or remedy for lack of appropriation of funds. Upon termination, the COURT will pay Contractor for the fair value of work satisfactorily performed prior to the termination, not to exceed the total Order Amount.

36. Entire Agreement

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

*END OF EXHIBIT*



**ATTACHMENT 2**  
**AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT C**  
**PAYMENT PROVISIONS**

1. Compensation for Contract Work

- A. For performing the work of this Agreement, as authorized by an Order, if any, COURT shall compensate the Contractor for an amount not to exceed the Order Amount set forth in that Order and compensation shall be based upon the actual cost at the applicable contract rates and for allowable expenses, in accordance with this Exhibit, unless otherwise agreed between the parties and set forth in an Order.
- B. The Contractor shall not request nor shall the COURT consider any reimbursement for non-production work including but not limited to time spent traveling to and from the job site or any living expenses.
- C. The basis for compensation for any Order issued under this Agreement is set forth below.

2. Salary Rates and Conversion Salary Rates

- A. Set forth in Exhibit D's Schedule 1, Salary Rates Schedule, are the approved Salary Rates for the Contractor for each approved Classification, by term.
- B. Set forth in Exhibit D's Schedule 2, Conversion Salary Rates Schedule, are the approved Conversion Salary Rates for each approved Classification, by term.
- C. The Salary Rate and the Conversion Salary Rates used to calculate the Billing Rate set forth in an Order for an Assigned Personnel shall be in accordance with the corresponding Conversion Salary Rates or Salary Rates for Assigned Personnel's Classifications.
- D. As further set forth in Exhibit E, Description of Services, in the event the parties agree to a Salary Rate for a new Classification or a Subcontractor Billing Rate for a new Classification or a new Subcontractor, (i) authorization of such agreement must be documented in writing between the parties, prior to proceeding with an Order, and (ii) such changes must be incorporated into the Agreement via a subsequent Amendment.

3. Contractual Mark-up Rates

- A. Set forth in Table 1, below, by term, are the Contractor Mark-up, COURT Referral Mark-up, and Subcontractor Mark-up rates, used to calculate the Billing Rate set forth in a Work Order and the applicable Schedule(s) in Exhibit D.

**ATTACHMENT 2  
AGREEMENT TERMS AND CONDITIONS**

TABLE 1 – MARK-UP

<i>No.</i>	<i>Description</i>	<i>Mark-up Rate – Initial Term</i>	<i>Mark-up Rate - 1st Option Term</i>	<i>Mark-up Rate – 2nd Option Term</i>
1	Contractor Mark-up	[TBD]%	[TBD]%	[TBD]%
2	COURT Referral Mark-up	[TBD]%	[TBD]%	[TBD]%
3	Subcontractor Mark-up	[TBD]%	[TBD]%	[TBD]%

4. Billing Rates

- A. Set forth in Exhibit D’s Schedule 3, Billing Rates Schedule including Contractor Mark-up and Salary Rates, are the approved Billing Rates consisting of Salary Rates with Contractor Mark-up for each approved Classification, by term.
- B. Set forth in Exhibit D’s Schedule 4, Billing Rates Schedule including Contractor Mark-up and Conversion Salary Rates, are the approved Billing Rates, consisting of Conversion Salary Rates with Contractor Mark-up, for each approved Classification, by term.
- C. Set forth in Exhibit D’s Schedule 5, Billing Rates Schedule including COURT Referral Mark-up and Salary Rates, are the approved Billing Rates, consisting of Salary Rates with COURT Referral Mark-up, for each approved Classification, by term.
- D. Set forth in Exhibit D’s Schedule 6, Billing Rates Schedule including Subcontractor Mark-up and Subcontractor Billing Rates, are the approved Billing Rates, consisting of Subcontractor Billing Rates with Subcontractor Mark-up, for each approved Classification, by term.
- E. The Billing Rate set forth in an Order for an Assigned Personnel shall comply with the Billing Rate for that Assigned Personnel’s Classification in the Agreement.
- F. As further set forth in Exhibit E, Description of Services, in the event the parties agree to a Billing Rate for a new Classification or a Subcontractor Billing Rate for a new Classification or a new Subcontractor, (i) authorization of such agreement must be documented in writing between the parties, prior to proceeding with an Order, and (ii) such changes must be incorporated into the Agreement via a subsequent Amendment.

## ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS

- G. With the exception of any allowable and applicable Overtime Pay, Travel Expenses, or background check expenses, as further addressed herein, a Billing Rate in an Order is inclusive of the applicable Salary Rate, Conversion Salary Rate, or Subcontractor Billing Rate; the applicable COURT Referral Mark-up, Contractor Mark-up, or Subcontractor Mark-up; and all other costs, benefits, expenses, fees, applicable city ordinances, overhead, and/or profits payable to the Contractor for services and work provided for this Agreement, pursuant to an Order.
  - H. A four (4) hour minimum charge per day will be incurred once the Assigned Personnel reports for work. All billing for hours worked is subject to and regulated by state and federal laws.
  - I. Upon receipt of an accurate invoice, as further addressed herein, the COURT will pay the Contractor the Billing Rate for work actually provided by the Assigned Personnel, in accordance with the applicable Order. Of the Billing Rate, the Contractor agrees that it will pay its Assigned Personnel or its Subcontractor the applicable Conversion Salary Rate, Salary Rate, or Subcontractor Billing Rate for temporary services provided, and retain the applicable Contractor Mark-up, COURT Referral Mark-up, or Subcontractor Mark-up, as payment for its services rendered under this Agreement.
  - J. Payment for work provided, at the Billing Rate set forth in an Order, along with any other allowable costs and/or expenses for that Order, shall not exceed the Order Amount set forth in that Order.
5. Allowable Overtime Charges
- A. The Billing Rate applies to a normal work-day of eight (8) hours. For work provided for an Assignment, pursuant to an Order, the Contractor may bill the COURT a separate charge from the Billing Rate for actual overtime worked by an Assigned Personnel in excess of a normal 8-hour work-day, if such overtime work (i) was pre-approved by the Reports To, prior to commencement of such work, (ii) is within scope of the applicable Order, and (iii) along with all other allowable charges for the applicable Order, does not exceed the Order Amount set forth in that Order. The Contractor may bill the COURT and the COURT will pay the Overtime Pay, which will equal the Overtime Rate of [TBD] times the applicable Billing Rate.
  - B. For work performed beyond the normal 8-hour work-day, including weekends, the Contractor will pay the Assigned Personnel, who worked the allowable overtime, at either (i) the rate of [TBD] times the applicable Salary Rate, Conversion Salary Rate, or Subcontractor Billing Rate, or (ii) twice the applicable Salary Rate, Conversion Salary Rate, or Subcontractor Billing Rate, if double time is required by the California Industrial Welfare Commission Orders.

## ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS

### 6. Allowable Travel Expenses

- A. If travel is required, as set forth in an authorized Order, and pre-approved by the Reports To prior to incurring any expenses, the Contractor will charge and the COURT will reimburse the Contractor for the Assigned Personnel's actual Travel Expenses, in accordance with state of California guidelines.
- B. The Assigned Personnel will submit to the Contractor original travel receipts for Travel Expenses incurred and the Contractor will reimburse the Assigned Personnel within thirty (30) Days of receipt of such travel receipts.
- C. Payment for Travel Expenses required for an Assignment of an Order, along with any other allowable costs and/or expenses for that Order, shall not exceed the Order Amount set forth in that Order.

### 7. Allowable Expenses for Background Checks

- A. For those candidates considered for an Assignment, the cost of required background checks, or those especially requested by the COURT, shall be a charge set forth in an Order.
- B. The Contractor will invoice the COURT and the COURT shall reimburse the Contractor for the actual and allowable cost associated with processing background checks.
- C. Payment for background checks required for an Assignment, as set forth in an Order, along with any other allowable costs and/or expenses associated with that Order, shall not exceed the Order Amount set forth in that Order.

### 8. Other Expenses

- A. COURT shall not consider reimbursement for costs or expenses not defined as allowable in this Agreement.
- B. Conversion Fees are defined as unallowed under this Agreement.
- C. Rates are inclusive of all burdened elements of cost, including sick leave and health benefits to be provided to any Assigned Personnel.

### 9. Discounts

- A. The Contractor will provide the following discounts to COURT under this Agreement:  
[TBD]

### 10. Taxes

## ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS

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

### 11. Method of Payment

- A. The Contractor shall submit an invoice for work provided and expenses incurred to the COURT , no more often than each Pay Period for each authorized Order; separate invoices are to be submitted for each Assigned Personnel. After receipt of invoice, the COURT will either approve the invoice for payment or give the Contractor specific written reasons why part or all of the payment is being withheld and what remedial actions the Contractor must take to receive the withheld amount. The COURT will make payment in arrears after receipt of the Contractor's properly completed invoice.
  
- B. The Contractor shall submit an invoice, including one (1) correct original and one (1) copies, to the COURT's address shown on the Order. Every invoice shall clearly indicate at least the following:
  - i) The Agreement Number;
  - ii) The Order Number;
  - iii) An unique invoice number;
  - iv) The Contractor's name and address;
  - v) The taxpayer identification (Contractor's federal employer identification number);
  - vi) The name of the Reports To, as indicated on the Order; and
  - vii) A preferred remittance address, if different from the mailing address.
  
- C. In addition to the requirements set forth in subparagraph B, above, invoices shall also include the following, as applicable:
  - i) The Assigned Personnel's name and Classification;
  - ii) The hours and dates the Assigned Personnel provided work for an Assignment and a copy of the Assigned Personnel's Time Sheet(s) for the invoiced Pay Period;
  - iii) The applicable Billing Rate set forth in the Order;
  - iv) The actual cost for background checks: a copy of the receipt or invoice for the checks or an original receipt, if requested;
  - v) For subcontracted work, a copy of the Subcontractor's invoice, including applicable Subcontractor Billing Rate;
  - vi) For allowable travel by the Assigned Personnel: the actual Travel Expense, the dates and purpose for the travel, original copy of the travel receipts, and proof of payment to the Assigned Personnel; and
  - vii) Overtime Pay, if allowable, in accordance with this Exhibit.

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**AGREEMENT TERMS AND CONDITIONS**

- D. Please note that invoices or vouchers not on printed bill heads shall be signed by the Contractor or the person furnishing the supplies or services.

12. Disallowance

If the Contractor claims or receives payment from COURT for a service or reimbursement that is later disallowed, the Contractor shall promptly refund the disallowed amount to the COURT upon request. At COURTS option, the COURT may offset the amount disallowed from any payment due or that may become due to the Contractor under this Agreement or any other agreement.

13. Government or Comparable Favorable Rates

The Contractor agrees that no other government will receive better rates for substantially similar services offered under substantially similar terms and conditions when the volume of business from such other customers is equal to or less than the volume of business the COURT deliver under this Agreement.

*END OF EXHIBIT*

**ATTACHMENT 2  
AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT D  
SCHEDULES**

This Exhibit includes the following schedules:

- 1) Schedule 1, Salary Rates Schedule
- 2) Schedule 2, Conversion Salary Rates Schedule
- 3) Schedule 3, Billing Rates Schedule including Contractor Mark-up and Salary Rates
- 4) Schedule 4, Billing Rates Schedule including Contractor Mark-up and Conversion Salary Rates
- 5) Schedule 5, Billing Rates Schedule including COURT Referral Mark-up and Salary Rates
- 6) Schedule 6, Billing Rates Schedule including Subcontractor Mark-up and Subcontractor Billing Rates

*END OF EXHIBIT*

**ATTACHMENT 2  
AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT D  
SCHEDULE 1  
SALARY RATES SCHEDULE**

<i>No.</i>	<i>Position Title</i>	<i>Rates – Initial Term</i>	<i>Rates – 1st Option Term</i>	<i>Rates – 2nd Option Term</i>
1	Accountant	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
2	Child Care Coordinator	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
3	Collections Officer	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
4	Legal Secretary	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
5	Legal Research Attorney	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
6	Admin/Clerical	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
7	Admin/Clerical - Fiscal	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
8	Admin/Clerical- Legal	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]

*END OF SCHEDULE*



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AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT D  
SCHEDULE 2  
CONVERSION SALARY RATES SCHEDULE**

<i>No.</i>	<i>Position Title</i>	<i>Rates – Initial Term</i>	<i>Rates – 1st Option Term</i>	<i>Rates – 2nd Option Term</i>
1	Administrative Assistant I	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
2	Administrative Assistant II	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
3	Administrative Assistant III	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
4	Administrative Assistant IV	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
5	Office Clerk I	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
6	Office Clerk II	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
7	Office Clerk III	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]
8	Data Entry Technician	[\$[TBD]]	[\$[TBD]]	[\$[TBD]]

*END OF SCHEDULE*

**ATTACHMENT 2  
AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT D  
SCHEDULE 3  
BILLING RATES SCHEDULE INCLUDING CONTRACTOR MARK-UP AND SALARY  
RATES**

<i>No.</i>	<i>Position Title</i>	<i>Rates – Initial Term</i>	<i>Rates – 1st Option Term</i>	<i>Rates – 2nd Option Term</i>
1	Administrative Assistant I	#[TBD]	#[TBD]	#[TBD]
2	Administrative Assistant II	#[TBD]	#[TBD]	#[TBD]
3	Administrative Assistant III	#[TBD]	#[TBD]	#[TBD]
4	Administrative Assistant IV	#[TBD]	#[TBD]	#[TBD]
5	Office Clerk I	#[TBD]	#[TBD]	#[TBD]
6	Office Clerk II	#[TBD]	#[TBD]	#[TBD]
7	Office Clerk III	#[TBD]	#[TBD]	#[TBD]
8	Data Entry Technician	#[TBD]	#[TBD]	#[TBD]

*END OF SCHEDULE*

**ATTACHMENT 2  
AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT D  
SCHEDULE 4  
BILLING RATES SCHEDULE INCLUDING CONTRACTOR MARK-UP AND  
CONVERSION SALARY RATES**

<i>No.</i>	<i>Position Title</i>	<i>Rates – Initial Term</i>	<i>Rates – 1st Option Term</i>	<i>Rates – 2nd Option Term</i>
1	Accountant	\$[TBD]	\$[TBD]	\$[TBD]
2	Child Care Coordinator	\$[TBD]	\$[TBD]	\$[TBD]
3	Collections Officer	\$[TBD]	\$[TBD]	\$[TBD]
4	Legal Secretary	\$[TBD]	\$[TBD]	\$[TBD]
5	Legal Research Attorney	\$[TBD]	\$[TBD]	\$[TBD]
6	Admin/Clerical	\$[TBD]	\$[TBD]	\$[TBD]
7	Admin/Clerical - Fiscal	\$[TBD]	\$[TBD]	\$[TBD]
8	Admin/Clerical- Legal	\$[TBD]	\$[TBD]	\$[TBD]

*END OF SCHEDULE*

**ATTACHMENT 2  
AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT D  
SCHEDULE 5  
BILLING RATES SCHEDULE INCLUDING COURT REFERRAL MARK-UP AND  
SALARY RATES**

<i>No.</i>	<i>Position Title</i>	<i>Rates – Initial Term</i>	<i>Rates – 1st Option Term</i>	<i>Rates – 2nd Option Term</i>
1	Administrative Assistant I	[\$TBD]	[\$TBD]	[\$TBD]
2	Administrative Assistant II	[\$TBD]	[\$TBD]	[\$TBD]
3	Administrative Assistant III	[\$TBD]	[\$TBD]	[\$TBD]
4	Administrative Assistant IV	[\$TBD]	[\$TBD]	[\$TBD]
5	Office Clerk I	[\$TBD]	[\$TBD]	[\$TBD]
6	Office Clerk II	[\$TBD]	[\$TBD]	[\$TBD]
7	Office Clerk III	[\$TBD]	[\$TBD]	[\$TBD]
8	Data Entry Technician	[\$TBD]	[\$TBD]	[\$TBD]
		[\$TBD]	[\$TBD]	[\$TBD]

*END OF SCHEDULE*

**ATTACHMENT 2  
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**EXHIBIT D  
SCHEDULE 6  
BILLING RATES SCHEDULE INCLUDING SUBCONTRACTOR MARK-UP AND  
SUBCONTRACTOR BILLING RATES**

<i>No.</i>	<i>Position Title</i>	<i>For Subcontractor(s) as Specified</i>	<i>Rates – Initial Term</i>	<i>Rates – 1st Option Term</i>	<i>Rates – 2nd Option Term</i>
1	[TBD]	[TBD]	[\$[TBD]	[\$[TBD]	[\$[TBD]

*END OF SCHEDULE*

**ATTACHMENT 2**  
**AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT E**  
**DESCRIPTION OF SERVICES**

1. General Description of Work

The description below generally illustrates the potential services that the Contractor may be asked to provide under this Agreement.

- A. Pursuant to Orders issued under this Agreement, perform temporary staffing agency services throughout the term(s) of the Agreement, in accordance with Exhibit B, Special Provisions, paragraph 36, Agreement Term.
- B. Staff temporary job openings, on request and in the requested time frame, with individuals who possess the required qualifications to perform the job to the fullest capacity.
- C. The Contractor will endeavor to continue providing the COURT with the temporary services of any temporary staff who were providing temporary services through the COURT's previous temporary staffing services provider, just prior to the Effective Date of this Agreement, should the need for the continued temporary services exist.
- D. Provide regular daily follow-up with the COURT or Order Project Manager on temporary positions that have not been filled.
- E. If unable to provide qualified candidates through its database by the designated due date stated on an Order, use subcontracted temporary staffing agency firm(s) to provide qualified candidates.
- F. Provide conduct and background checks, and past employee references for selected candidates within a reasonable time frame, using Form B, Reference Check Template.
- G. Provide the billing rate for each temporary employee, job classification, the applicable mark-up rates, and cost or hours to fulfill for temp-to-hire conversion, if any.
- H. Provide ad hoc and detailed monthly temporary staffing reports, which will include at least: name of employee, unit or office in which temporary employee worked, start and end dates (or anticipated end date), billing rate, classification, total regular hours worked, total overtime hours worked, and total amount invoiced.

## **ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS**

- I. Provide a single point of contact to support the entire account for this Agreement, allowing the COURT to interview potential replacements in the event a change of the point of contact is required.
2. Assignment Request
    - A. An Order Project Manager may call or email the Account Manager to request temporary personnel for an Assignment. Previously approved Classifications are set forth in Exhibit F, Classifications.
    - B. The COURT's request will include, but will not be limited to: (i) a description of the type of service or work requested; (ii) the Start Date and End Date for the Assignment; (iii) the Work Location; (iv) the Work Schedule; (v) any certifications that may be required; (vi) the level of expertise and/or education required; and (vii) any special conditions that may apply to the Assignment.
    - C. The Order Project Manager will forward a draft work order to the Account Manager. Upon the Contractor's receipt of a draft work order from the Order Project Manager, the Account Manager will forward introductions of potential candidates via email to the Order Project Manager.
    - D. The Order Project Manager may occasionally refer a potential candidate for an Assignment. The Account Manager will (i) interview the candidate; (ii) will process the candidate as an employee of the Contractor or employee of a Subcontractor, as appropriate; and (iii) will submit a response to the COURT's request that includes such candidate for consideration of the Assignment.
    - E. Each candidate to be considered for an Assignment shall be introduced in a separate email containing, at a minimum: (i) candidate's resume; (ii) the Salary Rate or Subcontractor Billing Rate, as applicable; (iii) the appropriate Contractor Mark-up, JBE Referral Mark-up, Subcontractor Mark-up, and/or discount, as applicable; (iv) the Billing Rate; (v) the Classification; and (vi) the applicable Conversion Period.
  3. Recruiting, Interviewing and Selection
    - A. The Contractor will pre-qualify the prospective candidates to determine acceptability and the candidate's ability to meet the requirements of the Assignment, including but not limited to, skill level, flexibility, professionalism, and communication skills.

## ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS

- B. The Contractor will verify the prospective candidates' employment information and references. The Contractor shall conduct personal background checks, including criminal background checks at the county level (e.g., counties of residence for the last seven years) on all prospective candidates within one week of beginning an Assignment under this Agreement. The actual cost for any background checks will be paid by the COURT from an Order.
- C. The Contractor will inform all prospective candidates of the Contractor's requirements and the prospective candidate's obligations pursuant to this Exhibit's paragraph 4, Administrative Requirements, below, if the candidate is selected to provide temporary services to the State.

### 4. Administrative Requirements

The Contractor shall inform all Assigned Personnel that: (i) said Assigned Personnel is not entitled to the provision of any State employee benefit, as required in Exhibit B, Special Provisions, paragraph 8, Contractor's And Subcontractor's Personnel Are Not Employees of the COURT; and (ii) said Assigned Personnel is bound by the terms and conditions of Exhibit B, Special Provisions, paragraph 24, Conflict of Interest.

### 5. Use of Approved Subcontractors

- A. Pursuant to Exhibit B, Special Provisions, paragraph 10, Subcontracting, the Contractor may utilize Subcontractors for the work of this Agreement.
- B. All Assigned Personnel that are submitted through an approved Subcontractor will be required to meet the same requirements as Assigned Personnel submitted directly by the Contractor.
- C. For Assigned Personnel submitted through approved Subcontractors, Exhibit C, Payment Provisions, and Exhibit D, Schedules, addresses applicable Subcontractor Billing Rates and Billing Rates with Subcontractor Mark-up.

### 6. New Subcontractor and/or New Classification and Rates

- A. Upon the Order Project Manager's request and on a case-by-case basis, the Account Manager will provide the following, in writing, to the COURT Program Manager, as applicable: (i) quote a new Salary Rate, or Subcontractor Billing Rate, for a Classification, which is not set forth in Exhibit F, Classifications, or (ii) propose a new Subcontractor's name, address, and qualifications, as needed, and quote a new Subcontractor Billing Rate for the applicable Classification, as set forth in Exhibit F, Classifications.
- B. The parties' agreement of a new Classification and the applicable Salary Rate or Subcontractor Billing Rate, and Billing Rate with applicable contractual mark-up,



## ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS

will be documented in writing and incorporated into the Agreement via a subsequent Amendment. Prior to the Amendment, but after the new Classification and rates have been agreed upon and documented in writing, the parties may process an Order, as set forth herein, that includes the new Classification and associated rates.

- C. The parties' agreement of a new Subcontractor and the applicable Subcontractor Billing Rate, and Billing Rate with Subcontractor Mark-up, will be documented in writing and incorporated into the Agreement via a subsequent Amendment. Prior to such Amendment, but after the new Subcontractor and rates have been agreed upon and documented in writing, the parties may process a candidate for an Assignment, as set herein, from the new Subcontractor and associated rates.

### 7. Authorization of An Order

- A. Upon completion of the selection process, in accordance with this Exhibit's paragraph 3, Recruiting, Interviewing and Selection, above, the Order Project Manager will forward the Order to the Account Manager; thereby providing the Contractor an authorized Order.

### 8. Termination of Assignment and Conversion

- A. Termination of an Assignment is set forth under this paragraph; termination of a Order or the Agreement, in whole or in part, is addressed under Exhibit A, Standard Provisions, paragraph 3, Termination for Cause; Exhibit B, Special Provisions, paragraph 4, Termination Other Than for Cause; or Exhibit B, Special Provisions, paragraph 5, COURT's Obligation Subject to Availability of Funds, as applicable.
- B. The Contractor is responsible for informing the Assigned Personnel when an Assignment is terminated, whether for unsatisfactory performance or the end of the Assignment.
- C. If the Assignment is terminated for unsatisfactory performance, the Contractor shall: (i) contact the Assigned Personnel as directed by the COURT and inform the Assigned Personnel that the Assignment has been terminated; (ii) arrange for next-day pick up of any badge, security card, Material or Data that the Assigned Personnel may have in their possession and its return to the COURT; and (iii) arrange for pick up of any personal items left at the COURT's premises on the following business day and return of such items to the Assigned Personnel.
- D. When an Assignment is ended for other than unsatisfactory performance, the COURT will, if it is reasonably able to do so, provide the Contractor Notice five (5) Days prior to the date of termination. Upon such Notice, the Contractor shall: (i) inform the Assigned Personnel of the date that the Assignment will terminate; (ii) instruct the Assigned Personnel that any badge, security card, Material or Data that the Assigned Personnel may have in their possession must be returned to the

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COURT on the last day of the Assignment; and (iii) request that the Assigned Personnel remove any personal items left at the COURT's premises on the last day of the Assignment.

- E. An Assignment may be terminated by the COURT, at no charge, if the COURT elects to hire the Assigned Personnel as an employee, as allowed, after the Conversion Period, which is after the Assigned Personnel has performed [TBD] hours of work for the COURT.
- F. See Exhibit B, Special Provisions, paragraph 18, Replacement of Contractor's Personnel, for conditions pertaining to replacement of Assigned Personnel or Key Staff.

9. Reports

Upon request, the Contractor will provide, at no charge, detailed staffing reports that will include, at a minimum, the assigned Order Number, expenditures under the Order to-date, the name of the Assigned Personnel, the unit or office in which the individual works or worked, the Hiring Manager and/or Reports To person named on the Order, the original Start Date, the current End Date, Classification, and the applicable Billing Rate.

*END OF EXHIBIT*

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**EXHIBIT F  
CLASSIFICATIONS**

<b>CLASSIFICATION TITLE</b>	<b>MINIMUM QUALIFICATIONS (MQs)</b>	<b>DESCRIPTION</b>
Accounting Technician	<p><i>Graduation from an accredited four-year college or university with a major in accounting, business, finance or a closely related field from accredited college or university that is acceptable within the United State's college or university system; or</i></p> <p><i>Successful completion of 12 semester credits of college level accounting or finance coursework from accredited college or university that is acceptable within the United State's college or university system and two (2) years experience at the same level of an Accounting Technician II with the Superior Court of California, County of Ventura.</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>Professional level of work in the maintenance, analysis, interpretation and management of the court financial accounting data. This includes the preparation and posting of various journals, ledgers and accounts, analysis and presentation of financial data, and preparation of financial reports, review and allocation of funds to various court accounts.</li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>Generally accepted accounting principles and theories.</li> <li>Financial statements and reports.</li> <li>Accounting ledgers and journals.</li> <li>Financial record keeping procedures.</li> <li>Computerized accounting procedures and practices.</li> <li>Auditing practices and principles.</li> <li>Principles and practices of sound business communication.</li> </ul>
Child Care Coordinator	<p><i>Completion of 12 post-secondary units in early childhood education or child development; and</i></p> <p><i>Four (4) years of full time experience teaching in a preschool or elementary school OR a college degree that qualifies for licensing as an elementary school teacher and includes student teaching.</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>Coordinate the activities of the children in the Children's Waiting Room including supervising children of parents/guardians who are conducting business with the Court, children who are witnesses for court proceedings, and children attending Family Law Mediation, and performing other duties as assigned.</li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>Child development theories and</li> </ul>

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<b>CLASSIFICATION TITLE</b>	<b>MINIMUM QUALIFICATIONS (MQs)</b>	<b>DESCRIPTION</b>
		<p><i>practices</i></p> <ul style="list-style-type: none"> <li>• <i>Safe and appropriate activities for children</i></li> <li>• <i>Cultural awareness and sensitivity</i></li> <li>• <i>Relevant laws, policies and regulations to ensure that children are safe at all times</i></li> <li>• <i>Basic computer usage and office skills</i></li> <li>• <i>Recognize, understand and address the needs of children with emotional and behavioral issues related to parents and guardians legal affairs and of children who are testifying in court or participating in Family Law Mediation</i></li> <li>• <i>Ensure a positive, safe and encouraging environment for children</i></li> <li>• <i>Be consistent and fair</i></li> <li>• <i>Effectively deal with individuals and groups from diverse cultural, social and economic backgrounds who are experiencing a high level of emotional stress and conflict</i></li> <li>• <i>Demonstrate effective communications skills</i></li> <li>• <i>Demonstrate sound work ethics</i></li> <li>• <i>Ability to work alone or with others</i></li> </ul>
Collections Officer	<p><i>Exercise considerable judgment and tact in locating debtors, researching debtors' assets, evaluating their ability to pay, applying laws and procedures and securing cooperation from debtors in collecting delinquent accounts, and initiating legal action to collect debts.</i></p>	<p><b>Examples of Duties</b> (Includes duties detailed as Administrative Assistant I and II)</p> <ul style="list-style-type: none"> <li>• <i>Provide mid- to high-level administrative support and coordination for projects and programs, transcribe correspondence, coordinate travel plans, research, interpret and prepare data for statistical studies and reports.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b></p>

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<b>CLASSIFICATION TITLE</b>	<b>MINIMUM QUALIFICATIONS (MQs)</b>	<b>DESCRIPTION</b>
		<p><i>(Includes knowledge, skills and abilities detailed as Administrative Assistant II)</i></p> <ul style="list-style-type: none"> <li>• <i>Advanced knowledge of Microsoft Office including: mail merge, formulas, and the creation of basic charts and forms.</i></li> <li>• <i>Ability to work independently with minimal direction.</i></li> <li>• <i>Experience in managing various time-sensitive projects.</i></li> <li>• <i>Ability to demonstrate effective communication and written skills at various levels.</i></li> <li>• <i>Effective organization and time management skills.</i></li> <li>• <i>Experience setting up and coordinating travel plans.</i></li> </ul>
<p>Legal Secretary</p>	<p><i>4-6 years of experience, preferably in the public sector in an administrative role.</i></p> <p><b>High School Diploma AND:</b></p> <p><b>I:</b> <i>1 year of experience in an administrative support role.</i></p> <p><b>II:</b> <i>2-4 years of experience in an administrative support role.</i></p> <p><b>III:</b> <i>4-6 years of experience in an administrative support role</i></p>	<p><b>Examples of Duties</b> <i>(Includes duties detailed as Administrative Assistant I-III)</i></p> <ul style="list-style-type: none"> <li>• <i>Provide executive-level administrative support including handling sensitive/confidential information, coordinate detailed travel plans, review and finalize reports, oversee and coordinate various projects and programs, analyze administrative reports and act as a liaison for executives to communicate agency-wide information.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b>  <i>(Includes knowledge, skills and abilities detailed as Administrative Assistant III)</i></p> <ul style="list-style-type: none"> <li>• <i>Advanced knowledge of Microsoft Office including: mail merge, formulas, and the creation of basic charts and forms.</i></li> <li>• <i>Ability to execute daily responsibilities and duties based on organizational structure and</i></li> </ul>

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		<p><i>protocol.</i></p> <ul style="list-style-type: none"> <li>• <i>Experience in supporting high-level executives.</i></li> <li>• <i>Experience in making and coordinating detailed travel plans.</i></li> <li>• <i>Ability to oversee high-level projects and programs with minimal direction.</i></li> </ul>
Admin/Clerical	<p><i>High School Diploma and 1 year of experience in an administrative role.</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Perform basic data-entry duties including typing, 10-key, transcribing correspondence, organize files and records, input documents completely, legibly and accurately and identify and request corrections, if needed.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• <i>Ability to communicate effectively and recommend solutions where issues arise.</i></li> <li>• <i>Possess great attention to detail and accurateness.</i></li> <li>• <i>Experience working with limited supervision.</i></li> </ul>
Admin/Clerical - Fiscal	<p><i>1 year of clerical experience in the area(s) of administration, procurement and/or accounting.</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Perform basic clerical and administrative duties such as recording and distributing incoming mail, verifying invoices and documents for arithmetic accuracy, screening calls and routing as appropriate, posting transactions and reconciling ledgers and accounting records to the system.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• <i>Basic working knowledge of</i></li> </ul>

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		<p><i>specified computer applications such as MS Word, Excel, Access, etc.</i></p> <ul style="list-style-type: none"> <li>• <i>Knowledge of Business Arithmetic.</i></li> <li>• <i>Basic practices of reviewing documents for completeness and accuracy.</i></li> </ul>
Admin/Clerical-Legal	<p><i>2 years of clerical experience in the area(s) of administration, procurement and/or accounting.</i></p>	<p><b>Examples of Duties</b> (Includes duties detailed as Accounting Clerk I)</p> <ul style="list-style-type: none"> <li>• <i>Perform basic administrative duties including preparing account systems documents (e.g. vouchers, encumbrances, warrants, checks, etc.) for approval and distribution.</i></li> <li>• <i>Verify data/information on accounting documents, filing and retrieval of accounting/financial documents in system.</i></li> <li>• <i>Perform physical inventories of materials and equipment and maintains current vendor and product price listings.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b>  (Includes knowledge, skills and abilities detailed as Accounting Clerk I)</p> <ul style="list-style-type: none"> <li>• <i>Knowledge of accounting, terminology, practices and account coding methodology.</i></li> <li>• <i>Experience with accounting internal control practices.</i></li> <li>• <i>Ability to make accurate arithmetic calculations.</i></li> </ul>
<b>Accounting Clerk III</b>	<p><i>3 years of clerical experience in the area(s) of administration, procurement and/or accounting.</i></p>	<p><b>Examples of Duties</b> (Includes duties detailed as Accounting Clerk I &amp; II)</p> <ul style="list-style-type: none"> <li>• <i>Administer accounting duties including preparing reports on the current and contemplated use of supplies for various operating</i></li> </ul>

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		<p><i>units.</i></p> <ul style="list-style-type: none"> <li>• <i>Review supply requests for completeness, accuracy, cost effectiveness and adherence to standards, codes, policies and procedures.</i></li> <li>• <i>Prepare accounting systems documents (e.g. vouchers, encumbrances, warrants, checks, etc.) for approval and distribution.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b>  <i>(Includes knowledge, skills and abilities detailed as Accounting Clerk I &amp; II)</i></p> <ul style="list-style-type: none"> <li>• <i>Experience reviewing and preparation of reports independently.</i></li> <li>• <i>Ability to perform more difficult and complex work requiring specialized expertise (than Accounting Clerks I and II).</i></li> </ul>
<b>Accountant I</b>	<i>Bachelor's Degree, preferably with major course work in accounting and 1-3 years of experience.</i>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Perform general accounting procedures including maintaining accurate financial records and accurate, timely financial reports, maintaining consistent cash flow analyses for judicial branch entities including grant related funding.</i></li> <li>• <i>Review incoming and outgoing contracts for financial, internal control, and regulatory compliance and signs off as the accounting officer.</i></li> <li>• <i>Conduct site review of grantee and court record keeping procedures.</i></li> <li>• <i>Analyze and review financial</i></li> </ul>



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<b>Accountant II</b>	<i>Bachelor’s Degree, preferably with major course work in accounting and 4-6 years of experience.</i>	<p><i>related legislation and expenditure reports and drafts necessary to issue papers and recommendations.</i></p> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• <i>Knowledge of principles, practices, and applications of general, fund, and governmental accounting.</i></li> <li>• <i>Knowledge of principles and practices of auditing, reviewing financial documents, budget administration, financial data collection, control and grant preparation.</i></li> <li>• <i>Ability to interpret, explain, and apply requirements, rules and regulations related to various funding sources.</i></li> <li>• <i>Ability to review and audit financial documents for completeness and accuracy.</i></li> <li>• <i>Ability to generate and reconcile financial reports using an automated financial system.</i></li> </ul>
<b>Accountant III</b>	<i>Bachelor’s Degree, preferably with major course work in accounting and 6+ years of experience.</i>	<p><b>Examples of Duties</b> (Includes duties detailed as Accountant I and II)</p> <ul style="list-style-type: none"> <li>• <i>Advanced level of accountant duties including preparing reports and presentations regarding findings, conducting special studies and reviews as assigned.</i></li> <li>• <i>Provide backup operational assistance as needed, reviewing and approving month-end</i></li> </ul>

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		<p>reconciliations.</p> <ul style="list-style-type: none"> <li>• <i>Oversee fixed asset accounting operations and grant accounting.</i></li> </ul> <p><b>Knowledge, Skills and Abilities Includes knowledge, skills and abilities detailed as Accountant I and II)</b></p> <ul style="list-style-type: none"> <li>• <i>Ability to review and audit financial documents for completeness and accuracy.</i></li> <li>• <i>Ability to review, post and balance financial data.</i></li> <li>• <i>Ability to generate and reconcile financial reports using an automated financial system.</i></li> </ul>
<b>Contract Specialist I</b>	<i>Bachelor's Degree with major course work in business administration or a closely related field and 1-3 years of relevant experience.</i>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Perform contracting duties including developing and preparing Request for Proposals (RFP), Request for Information (RFI), and complicated bid documents.</i></li> <li>• <i>Provide training to staff and courts in evaluation techniques for RFPs, RFIs, and bid documents.</i></li> <li>• <i>Facilitate bidders' conferences, negotiating price, terms, and conditions with vendors.</i></li> <li>• <i>Provide training to branch staff on negotiation techniques, drafting contracts.</i></li> <li>• <i>Develop general, special, and technical provisions in contracts to ensure maximum competition.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• <i>Knowledge of principles and</i></li> </ul>

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<b>Contract Specialist II</b>	<i>Bachelor’s Degree with major course work in business administration or a closely related field and 4-6 years of relevant experience.</i>	<p><i>practices of acquisition planning, development, and implementation.</i></p> <ul style="list-style-type: none"> <li>• <i>Knowledge on contract administration and termination techniques.</i></li> <li>• <i>Ability to conduct price/cost analysis.</i></li> </ul>
<b>Contract Specialist III</b>	<i>Bachelor’s Degree with major course work in business administration or a closely related field and 6+ years of relevant experience.</i>	<p><b>Examples of Duties</b> (Includes duties detailed as Contract Specialist I and II)</p> <ul style="list-style-type: none"> <li>• <i>Perform high level contract consultation including making policy recommendations on contracting matters.</i></li> <li>• <i>Serve as an expert resource for the branch on policies and procedures related to procurement and contracting.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b>  (Includes knowledge, skills and abilities detailed as Contract Specialist I and II)</p> <ul style="list-style-type: none"> <li>• <i>Knowledge of laws, regulations and rules associated with</i></li> </ul>

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		<p><i>contract development, administration and termination.</i></p> <ul style="list-style-type: none"> <li>• <i>Knowledge of contract types, methods and techniques including cost and incentive contracting, award fee, cost-sharing arrangements, processing of unsolicited proposals and multiple awards.</i></li> </ul>
<p><b>Paralegal</b></p>	<p><b>I:</b> <i>1-3 years of paralegal experience involving complex litigation.</i></p> <p><b>II:</b> <i>4-6 years of paralegal experience involving complex litigation and a paralegal certificate from an accredited institution.</i></p> <p><b>III:</b> <i>6+ years of paralegal experience involving complex litigation and a paralegal certificate from an accredited institution.</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Perform duties associated with paralegal support including working closely with attorneys to gather documentation and supporting information, summarizing court and legal records, maintaining case files and database information, generating indexes, retrieving supporting information and assembling background information and performing legal research, including use of computer assisted legal research systems.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• <i>Ability to research and analyze information.</i></li> <li>• <i>Experience drafting legal documents.</i></li> <li>• <i>Ability to perform legal research on Lexis/Nexis library databases.</i></li> <li>• <i>Possess summarization, discovery, and indexing skills.</i></li> <li>• <i>Intermediate working knowledge of specified computer applications such as: MS Word, Excel, PowerPoint, Email, Internet, Calendar software.</i></li> </ul>

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<b>Attorney</b>	<p><i>Admission to the State Bar of California AND:</i></p> <p><b>I:</b> 2-4 years relevant post-bar experience in a legal setting, such as a private law practice, corporation, government agency, law school, court or legal publishing company.</p> <p><b>II:</b> 4-6 years relevant post-bar experience in a legal setting, such as a private law practice, corporation, government agency, law school, court or legal publishing company.</p> <p><b>III:</b> 6+ years relevant post-bar experience in a legal setting, such as a private law practice, corporation, government agency, law school, court or legal publishing company.</p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Support and perform legal services including consulting with other attorneys and/or professional staff regarding legal issues, serving on committees as required and conducting special legal research and assignments when requested.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• <i>Experience in analysis and drafting of legal and policy memoranda.</i></li> <li>• <i>Experience and involvement in legal publishing, legislation or contracts.</i></li> <li>• <i>Experience providing legal or judicial education.</i></li> <li>• <i>Experience staffing committees.</i></li> <li>• </li> </ul>

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<p><b>Research Attorney</b></p>	<p><b>EDUCATION:</b>  Completion of a Juris Doctorate degree from an accredited college or university.</p> <p><b>EXPERIENCE:</b>  Performing legal research and developing legal opinions with a trial or appellate court</p> <p>OR</p> <p>A minimum of five (5) years experience as a civil litigation attorney with expertise in discovery and law and motion practice.</p> <p><b>LICENSE REQUIREMENT:</b>  Current active membership and good standing with the State Bar of California.</p>	<p><b><u>ESSENTIAL DUTIES:</u></b></p> <ul style="list-style-type: none"> <li>• Reviews and summarizes arguments, evidence, and procedural history on matters submitted to the Court</li> <li>• Identifies and analyzes legal authorities relevant to the disposition of matters</li> <li>• Briefs judicial officers on research and analysis pertaining to matters before the Court, identifies and discusses unresolved issues necessary for the disposition of matters, and formulates dispositions</li> <li>• Responds to judicial officers inquiries on procedural and substantive issues, attends and assists at hearings, as necessary; conducts reviews of documents at the requests of judicial officers, as necessary</li> <li>• Serves as legal adviser to the judicial offices, staff, or judicial committees on specific matters before the Court, as necessary</li> <li>• Assists with the drafting of legal documents and memoranda required by the Court, as necessary</li> <li>• Judgment and Responsibility</li> <li>• Incumbents perform their work under general direction. Court Research Attorneys conduct extensive legal research using independent judgment, discretion, and initiative. Erroneous recommendations or failure to</li> </ul>

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		<p><i>achieve objectives may result in substantial delays and considerable expenditure of resources.</i></p> <p><b>KNOWLEDGE AND ABILITIES:</b></p> <ul style="list-style-type: none"> <li>• <i>Knowledge of legal principles and applications to matters within area of assignment; relevant statutory; constitutional and case law; online legal research methods (i.e. Westlaw or Lexis); rules of evidence and conduct of proceedings in trial, appellate and United States courts; judicial ethics; word processing and other office automation software.</i></li> <li>• <i>Ability to listen to and interact with judicial officers and others involved in the assigned caseload; identify legal issues and research statutes and case law; apply legal principles to case facts and make decisions; prepare and present verbal and written legal analyses and recommendations; coordinate work with others; work in an environment with conflicting priorities; recognize and respect limits of authority and responsibility; uphold judicial ethics; and work independently and as part of a team</i></li> </ul>
<p><b>Labor and Employee Relations Analyst I</b></p>	<p><i>Bachelor’s degree and minimum of 4 years professional experience in a labor and employee relations position as an analyst or in a supervisory role.</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Provide expertise and serve as spokesperson for the court in labor negotiations and during collective bargaining.</i></li> <li>• <i>Serve as an investigator of formal and informal claims of discrimination and drafts responses.</i></li> <li>• <i>Analyze and prepare legal memoranda and issues papers, legal opinions, and other legal memoranda. Participate in the</i></li> </ul>

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		<p><i>development of judicial branch employment policies.</i></p> <p><b>Knowledge, Skills and Abilities: Both levels of Labor and Employee Relations Analysts must possess the following:</b></p> <ul style="list-style-type: none"> <li>• <i>Working knowledge of collective bargaining process in the public and/or private sectors.</i></li> <li>• <i>Knowledge of negotiation principles including negotiations preparation, trust building, effective listening and understanding settlement ranges.</i></li> <li>• <i>Experience resolving disputes and investigatory skills.</i></li> <li>• <i>Knowledge of best alternatives to a negotiated agreement (e.g., impasse procedures).</i></li> <li>• <i>Knowledge of grievance and arbitration procedures.</i></li> <li>• <i>Ability to interpret and apply labor laws and provisions of memoranda of understanding.</i></li> </ul>
<p><b>Analyst</b></p>	<p><b>Bachelor’s Degree AND:</b></p> <p><b>I:</b> <i>1 year of experience in an analyst role in the specified functional area.</i></p> <p><b>II:</b> <i>2-4 years of experience in an analyst role in the specified functional area.</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Perform analytical work and support relating to compiling data, distributing surveys, researching various topics and summarizing results, drafting memos, reports and other documents, testing systems, evaluating and developing work systems, compiling and projecting cost of programs, present findings and recommending solutions.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• <i>Demonstrate knowledge of principles and practices of</i></li> </ul>



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		<p><i>specified field.</i></p> <ul style="list-style-type: none"> <li>• <i>Ability to display organizational, interpersonal and professional skills.</i></li> <li>• <i>Ability to interpret, explain and apply requirements, rules and regulations related to issues in the assigned program area.</i></li> <li>• <i>Display knowledge of the quantitative and qualitative analysis of data.</i></li> </ul>
<p><b>Graphic Designer</b></p>	<p><i>Associates' Degree in Graphic Design or Web Design or closely related field plus 1-2 years experience of a similar capacity.</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Perform specialized design and coding for electronic publishing including designing format of documents, using specialized graphic design software, producing and finalizing graphics and images and coordinate with client and third party vendors to establish design criteria and materials.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• <i>Advanced proficiency with a variety of design and graphics software, including page layout, illustration, slide presentation and image manipulation applications.</i></li> <li>• <i>Experience with peripheral equipment, including graphic tablet, scanner, removable storage devices and output devices.</i></li> <li>• <i>Ability to organize, prioritize, and coordinate multiple work activities and meet critical deadlines with minimal supervision.</i></li> </ul>

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<b>CLASSIFICATION TITLE</b>	<b>MINIMUM QUALIFICATIONS (MQs)</b>	<b>DESCRIPTION</b>
		<ul style="list-style-type: none"> <li>• Ability to establish and maintain effective working relationships with those contacted in the course of work.</li> </ul>
<b>Web Content Strategist</b>	<i>Bachelor’s Degree in Information Systems, Computer Science or closely related field and 4-6 years experience of a similar capacity.</i>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• Perform a strategic consultant role supporting the COURT and various state websites. Tasks include web development, design, programming, testing, traffic management, content production, delivery, software technology concepts and project management.</li> </ul> <p><b>Knowledge, Skills and Abilities</b></p> <ul style="list-style-type: none"> <li>• Strong content and user experience skills.</li> <li>• Proven system development and project management experience (from conception to security and maintenance of web content).</li> <li>• Experience in a lead role developing content strategies for the web and contributing to editorial platforms.</li> </ul>
<b>Facilities Administrator I</b>	<i>Associates Degree and a minimum of 2 years of experience in facility/building management.</i>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• Perform management of day-to-day facilities and building duties including conferring with Building Management and clients to identify and correct facility problems, assist with renovation of existing space, coordinate moves and relocation of staff, including site readiness, resolve move issues.</li> <li>• Maintains database of office and workstation assignments.</li> <li>• Oversee small building alterations, repairs, and</li> </ul>

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<b>CLASSIFICATION TITLE</b>	<b>MINIMUM QUALIFICATIONS (MQs)</b>	<b>DESCRIPTION</b>
		<p><i>maintenance projects.</i></p> <ul style="list-style-type: none"> <li>• <i>Oversee project budgets and control costs.</i></li> </ul> <p><b><i>Knowledge, Skills and Abilities</i></b></p> <ul style="list-style-type: none"> <li>• <i>Principals of vendor management.</i></li> <li>• <i>Knowledge of current practices and materials used to repair buildings and facilities including the technical aspects of building operations.</i></li> <li>• <i>Experience with facility maintenance.</i></li> <li>• <i>Experience with project and schedule management.</i></li> <li>• <i>Knowledge of space analysis and planning techniques.</i></li> <li>• <i>Ability to manage multiple projects and analyze existing space needs.</i></li> <li>• <i>Ability to monitor project budgets and implement cost controls.</i></li> </ul>
<b><i>Facilities Administrator II</i></b>	<i>Bachelor's Degree and a minimum of 4 years of experience in facility/building management.</i>	<p><b><i>Examples of Duties (Includes duties detailed as a Facilities Administrator I)</i></b></p> <ul style="list-style-type: none"> <li>• <i>Perform management of facilities and building duties including participating in the development of criteria for prioritization of preventive maintenance and operations activities.</i></li> <li>• <i>Conduct studies to forecast, evaluate operations and maintenance needs, equipment replacement requirements, staffing requirements, and cost effectiveness of programs, equipment, and procedures.</i></li> <li>• <i>Acts as unit liaison to Superior Court Executive Officers and</i></li> </ul>

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<b>CLASSIFICATION TITLE</b>	<b>MINIMUM QUALIFICATIONS (MQs)</b>	<b>DESCRIPTION</b>
		<p><i>County Administrative Officers.</i></p> <ul style="list-style-type: none"> <li>• <i>Develops a working knowledge of court-specific administrative priorities and appropriately aligning facilities management resources.</i></li> </ul> <p><b>Knowledge, Skills and Abilities</b>  <i>(Includes knowledge, skills, and abilities detailed as a Facilities Administrator I)</i></p> <ul style="list-style-type: none"> <li>• <i>Experience in facility operations and maintenance planning, development and implementation techniques.</i></li> <li>• <i>Knowledge of laws, regulations and standards associated with health and safety, labor compliance, building and government codes.</i></li> <li>• <i>Experience with contract negotiation and administration. Including understanding contract documents such as specifications, proposals and bids.</i></li> <li>• <i>Knowledge of emergency response and coordination procedures, policies, standards and processes.</i></li> <li>• <i>Understand architectural and engineering plans and reports, technical systems and financial analyses.</i></li> </ul>
<p><b>AV Systems Design Engineer</b></p>	<p><i>Bachelor’s Degree with course work in audiovisual systems engineering and:</i></p> <p><b>I:</b> <i>2-4 years of relevant experience;</i></p> <p><b>II:</b> <i>4-6 years of relevant experience; and</i></p>	<p><b>Examples of Duties</b></p> <ul style="list-style-type: none"> <li>• <i>Analyze, design, integrate, install and support audiovisual systems hardware, software, and technical infrastructure.</i></li> <li>• <i>Develop, analyze, review, and evaluate audiovisual and low voltage systems solutions; and</i></li> </ul>

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<b>CLASSIFICATION TITLE</b>	<b>MINIMUM QUALIFICATIONS (MQs)</b>	<b>DESCRIPTION</b>
	<p><b>III:</b> 6+ years of relevant experience.</p>	<p><i>assist with the development of standards and evaluate capital constructions project for conformance;</i></p> <ul style="list-style-type: none"> <li>• <i>Review and comment on schematic plans and specifications prepared by architects and consultants;</i></li> <li>• <i>Investigate, analyze, and evaluate project cost feasibility; review and prepare reports for cost estimates, RFP and contract submittals</i></li> </ul> <p><b>Knowledge, Skills and Abilities:</b> <i>All levels of AV Systems Design Engineer must possess the following:</i></p> <ul style="list-style-type: none"> <li>• <i>Knowledge of principles of audiovisual and low-voltage technologies design, development, engineering, integration and implementation.</i></li> <li>• <i>Knowledge of principles of standards development creation and conformance evaluation.</i></li> <li>• <i>Knowledge of principles of schematic, design, and construction drawing creation and review; and facility design and construction.</i></li> <li>• <i>Knowledge of principles of budget development, contract and Request for Proposal (RFP) creation and evaluation.</i></li> <li>• <i>Knowledge of principles of audiovisual and low-voltage</i></li> </ul>

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<b><i>CLASSIFICATION TITLE</i></b>	<b><i>MINIMUM QUALIFICATIONS (MQs)</i></b>	<b><i>DESCRIPTION</i></b>
		<i>systems performance criteria and analysis, methods and mechanisms for testing and problem resolution.</i>

*END OF EXHIBIT*

**ATTACHMENT 2  
AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT G  
CONTRACTOR'S KEY STAFF**

1. Table 1, below, sets forth the Contractor's Key Staff designated to perform the work of this Agreement.

TABLE 1 – KEY STAFF

<b>Name of Key Staff</b>	<b>Role</b>
[TBD]	Account Manager

2. The resume(s) of the Contractor's Key Staff, identified in Table 1, above, is attached to this Exhibit and set forth on the following pages.

RFP Title: Temporary Staffing Services  
RFP Number: HS-14-5-1-JB

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*[Remainder of page left blank intentionally]*

*END OF EXHIBIT*



**ATTACHMENT 2**  
**AGREEMENT TERMS AND CONDITIONS**

**EXHIBIT H**  
**FORMS**

This Exhibit includes the following attachments:

- 1) Form A, Temporary Services Employee Agreement Form
- 2) Form B, Reference Check Template
- 3) Form C, Sample Work Order Template

*END OF EXHIBIT*

**ATTACHMENT 2  
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**EXHIBIT H  
FORM A  
TEMPORARY SERVICES EMPLOYEE AGREEMENT FORM**

FOR GOOD CONSIDERATION, and in consideration of being assigned by \_\_\_\_\_ (“Agency”) and providing temporary services to \_\_\_\_\_ (“COURT”), I hereby agree and acknowledge:

1. That during the course of my assignment there may be disclosed to me certain information that may include trade secrets, financial, statistical, personnel, technical, business and other data and information relating to the COURT’s business or the business of its constituents (“Confidential Information”).
2. Confidential Information includes, but is not limited, to trade secrets, financial, statistical, personnel, technical, business and other data and information provided by or relating to the COURT’s business or the business of its constituents. Confidential Information does not include (a) information that is already known by the receiving party, free of the obligation of confidentiality to the disclosing party; (b) information that becomes generally available to the public, other than as a result of disclosure by the receiving party in breach of this agreement; (c) information that is independently developed by the receiving party without reference to the Confidential Information; (d) information that the receiving party rightfully obtains from a third party, free of the obligation of confidentiality to the disclosing party; or (e) information that the receiving party obtains from the other party that the receiving party believes is free of the obligation of confidentiality to the disclosing party.
3. During the course of my assignment for the COURT and any time thereafter:
  - a) I shall not use for myself or others, or disclose or divulge to others, including future employers, any Confidential Information received as a result of my assignment to the COURT.
  - b) I shall not acquire any right or title to the Confidential Information.
4. I agree that upon termination of my assignment with the COURT, I shall return to the COURT all Confidential Information, documents and property of the COURT, including but not necessarily limited to: building pass, security badge, pass codes,

## **ATTACHMENT 2 AGREEMENT TERMS AND CONDITIONS**

- drawings, blueprints, reports, manuals, correspondence, computer programs, and all other materials and copies thereof relating in any way to the COURT's business, or in any way obtained by me during the course of my assignment for the COURT. I further agree that I shall not retain copies, notes or abstracts of the foregoing.
5. Notwithstanding the foregoing, it is agreed that, upon written notice to the COURT, the Confidential Information may be disclosed (a) to the extent necessary to comply with any law, rule, regulation or ruling, or (b) as appropriate to respond to any summons or subpoena.
  6. Furthermore, all documents, deliverables, software, systems designs, disks, tapes CDs and any other data or materials that I may create in whole or in part during the course of or related to my assignment for the COURT shall be treated as if it were "work for hire" for the COURT and I will immediately disclose to the COURT all discoveries, inventions, enhancements, improvements, and similar creations (collectively, "Creations") made, in whole or in part, in the course of or related to services that I may provide to the COURT.
  7. All ownership and control of the above data, materials, and Creations, including any copyright, patent rights, and all other intellectual property rights therein, shall vest exclusively with the COURT, and I hereby assign all right, title, and interest that I may have in such data, materials, and Creations to the COURT, without any additional compensation and free of all liens and encumbrances of any type. Upon the COURT's written request, I shall immediately provide the COURT with all such data, materials, and Creations and execute any assignment requested by the COURT.
  8. Additionally, I agree not to publish or submit for publication any article, press release, or other writing relating to the services I provide for the COURT without prior written permission from the COURT.
  9. During the course of my assignment for the COURT, I will not knowingly engage in any illegal actions or perform any work involving any dangerous condition or unusual risk of bodily injury.
  10. I will perform all services for the COURT in a professional manner and I will not disclose any private information of the COURT that is obtained in the performance of providing such services that if disclosed to third parties may be damaging to the COURT.
  11. The Agency may notify any future or prospective employer or third party of the existence of this agreement and, in addition to any other remedy, shall be entitled to full injunctive relief for any breach.

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12. The laws of the State of California shall govern this agreement and its validity, construction and effect without regard to conflict of law principles.
13. This agreement shall be binding upon me and my personal representatives and successors in interest, and shall inure to the benefit of the Agency, its successors and assigns.

Signed this \_\_\_\_\_ day of \_\_\_\_\_ 200\_\_\_\_\_.

\_\_\_\_\_  
(Print Full Name)

\_\_\_\_\_  
(Signature)

*END OF FORM*

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**EXHIBIT H  
FORM B  
REFERENCE CHECK TEMPLATE**

<b>Candidate Name:</b> _____	<b>Title Held:</b> _____
<b>Candidate's Ending Salary:</b> _____	<b>Salary consistent with App?</b> <input type="checkbox"/> YES <input type="checkbox"/> NO*: *If no, state reason:
<b>Dates Employed:</b> _____	<b>Dates consistent with App?</b> <input type="checkbox"/> YES <input type="checkbox"/> NO*: *If no, state reason:

<b>Reference Name:</b> _____	<b>Current Title:</b> _____
<b>Company Contacted:</b> _____	<b>Phone:</b> _____
<b>Former Company Name: (if employer differs)</b>	<b>Former Title: (if changed)</b>

1. What was your professional relationship to the candidate?
2. How long have you known and/or supervised the candidate?
3. What was the candidate's job title and responsibilities during his/her employment?
4. How would you describe the overall quality of the candidate's work and why?

\_\_\_\_\_  
If above average, can you provide me with specific examples of how the work of (the candidate) is/was exemplary?

5. What would you consider as the candidates strongest skills?
6. What would you consider as the candidates weakest points, or areas where he/she could have benefited from additional coaching?
7. On a 0 - 10 scale, with 0 being poor and 10 being exceptional, how would you rate the candidate's level of customer service and why?

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8. (If applicable to level) How would you describe the candidate's analytical skills?
9. (If applicable to level) How would you rate the candidate's ability to manage an assigned project?
10. On a 0-10 scale, with 0 being poor and 10 being exceptional, how would you rate the candidate compared to other employees who held the same position in your organization? Why?
11. Can you describe the candidate's verbal communication skills? If possible, please elaborate on the candidate's ability to communicate effectively through speaking and listening, and (if applicable) during meetings, presentations, trainings, etc.
12. Can you describe the clarity and overall quality of the candidate's written communication? Specifically, how effective was the candidate's communication to others in the form of email, memoranda, reports, and other correspondence?
13. (If applicable to level) On a 0-10 scale, with 0 being poor and 10 being exceptional, how would you rate the candidate's technical expertise and understanding in his/her field? Please explain.
15. Did you ever have to counsel this employee for absenteeism or attendance/punctuality?
16. During the candidate's employment, were there any incidents of dishonesty, or threatening behavior? Please describe.
17. Is there anything else you could tell us that will help us to consider him/her for the position which I described to you earlier?
18. Could you fully describe the circumstances and reason for the separation?
19. If given the opportunity, would you rehire (the candidate)? If so, at what level would you rehire him/her?
20. Could you recommend anyone else that I should speak to regarding the candidate, should the candidate authorize for me to contact them?

REFERENCES CHECKED BY:

DATE:

Miscellaneous Information to Note:

*END OF FORM*