

**STANDARD AGREEMENT** Rev Feb 2025

AGREEMENT NUMBER  
**41-25-TBD**

1. In this agreement (“Agreement”), the term “Contractor” refers to **TBD**, and the term “JBE” or “Court” refers to the **Superior Court of California, County of San Mateo**

2. This Agreement is effective as of March 31<sup>st</sup>, **2025** (“Effective Date”) and expires on **June 30<sup>th</sup>, 2027** (“Expiration Date”).

This Agreement includes one or more options to extend through **June 30<sup>th</sup>, 2029** (“Option Term”).

3. The maximum amount the JBE may pay Contractor under this Agreement is **TBD** (the “Contract Amount”). The amount to be paid for the option years will be determined prior to the execution of an option year.

4. The purpose or title of this Agreement is: A dedicated courier service for three branches of the JBE:

- Hall of Justice: 400 County Center, Redwood City, CA 94063
- Northern Branch: 1050 Mission Road, South San Francisco, CA 94080
- Youth Services Center: 222 Paul Scannell Dr, San Mateo, CA 94402
- San Mateo Central: 800 N Humboldt St, San Mateo, CA 94401

Description of work and hours based on IFB 41-25-I001

*The purpose or title listed above is for administrative reference only and does not define, limit, or construe the scope or extent of this Agreement.*

5. The parties agree that this Agreement, made up of this coversheet, the appendixes listed below, and any attachments, contains the parties’ entire understanding related to the subject matter of this Agreement, and supersedes all previous proposals, both oral and written, negotiations, representations, commitments, writing and all other communications between the parties.

Appendix A – Services

Appendix B – Payment Provisions

Appendix C – General Provisions

Appendix D – Defined Terms

6. The JBE’s project manager is: Irene Maxwell

JBE’S SIGNATURE	CONTRACTOR’S SIGNATURE
Superior Court of California, County of San Mateo	CONTRACTOR’S NAME (if Contractor is not an individual person, state whether Contractor is a corporation, partnership, etc., and the state or territory where Contractor is organized)

BY (Authorized Signature) ?	BY (Authorized Signature) ?
PRINTED NAME AND TITLE OF PERSON SIGNING <b>Hon. Judge Stephanie Garratt, Presiding Judge</b>	PRINTED NAME AND TITLE OF PERSON SIGNING
DATE EXECUTED	DATE EXECUTED
ADDRESS <b>400 County Center, Redwood City, CA, 94063</b>	ADDRESS

**APPENDIX A**  
**Services**

**1. Background and Purpose.**

The Superior Court of California, County of San Mateo (Court) operates out of three facilities spread out across San Mateo County. The Court operates a main courthouse that houses most court and administrative operations, as well as a northern courthouse in South San Francisco that houses traffic court and some other offices, and a Juvenile courthouse in the City of San Mateo.

Statutory requirements drive the need for documents to be moved expeditiously from one courthouse to another at prescribed times and prescribed routes each day.

**2. Services**

Contractor shall perform the following services (“Services”):

**2.1. Scope of Work**

- a. **Courier Service** – Successful bidders will provide a dedicated courier service utilizing the schedule provided in 2.1 (B), Monday through Friday, except as described in 2.1 (H).
- b. **Schedule of Services** –

<b>Route</b>	<b>Departure</b>	<b>Arrival</b>
Redwood City (“RWC”) to Youth Services Center (“YSC”)	<b>10:00 AM</b>	<b>10:30 AM</b>
YSC to South San Francisco (“SSF”)	<b>10:40 AM</b>	<b>11:15 AM</b>
SSF to RWC	<b>11:25 AM</b>	<b>12:15 PM</b>
RWC to San Mateo Central (“Central”)	<b>12:30 PM</b>	<b>1:00 PM</b>
Central to SSF	<b>1:10 PM</b>	<b>1:40 PM</b>
SSF to RWC	<b>1:50 PM</b>	<b>2:50 PM</b>

- c. **Arrival Times** – Except in egregious circumstances, couriers must arrive within 15 minutes of the scheduled arrival time.
  - i. When a courier will arrive more than ten minutes behind the scheduled arrival time, except when doing so will create an unsafe condition, and as soon as practicable, the courier must attempt to contact the location contact described in 2.2.
- d. **Delivery Sorting** – Court staff at each pick-up location will sort deliveries into mail tote type bins labeled for their appropriate delivery point. The courier shall pick up all deliveries for locations that remain on their route for the day.
- e. **Delivery of All Items** – Courier, in no circumstance, shall maintain possession of any court related document or delivery past the close of business or the final delivery of the day.

**f. Logs** – The Court may choose to require the courier log the time of each departure or arrival. This may vary by location. Couriers will comply with any requests to sign into or out of a court facility.

**g. Facility Access** – The court contracts with the San Mateo County Sheriff’s department to provide physical security and access control to court facilities. In accordance with 2.3, couriers will comply with all requirements of the Sheriff’s Office when obtaining access to Court facilities. All deliveries and pick-ups must be performed inside of the office or facility, as described in 3.2 below.

**h. Holidays** – Unless otherwise indicated, the Court observes and is closed on the holidays (details listed on the California State Courts [website](#)). No courier services will be utilized on these days. Court’s Participating holidays are listed below:

- New Years' Day
- Martin Luther King, Jr., Day
- Lincoln’s Birthday
- Presidents Day
- Cesar Chavez Day
- Memorial Day
- Juneteenth Day
- Independence Day
- Labor Day
- Native American Day
- Veterans Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Day

**2.2. Locations**

<b>(A) Redwood City</b>	
<b>Address:</b>	400 County Center, Redwood City, CA 94063
<b>Pick-Up Location:</b>	Mail Room – 1st Floor
<b>References:</b>	HOJ, Hall of Justice, Southern
<b>Location Contact:</b>	Alessandra Robleto - (650) 261-5171

<b>(B) YSC San Mateo</b>	
<b>Address:</b>	222 Paul Scannell Drive, San Mateo, CA 94402
<b>Pick-Up Location:</b>	Juvenile Clerk’s Office
<b>References:</b>	YSC, Youth Services Center, Juvenile
<b>Location Contact:</b>	Jeffrey Rolston (650) 261-5158

<b>(C) South San Francisco</b>	
<b>Address:</b>	1050 Mission Road, South San Francisco, CA 94080
<b>Pick-Up Location:</b>	Traffic Clerk's Office
<b>References:</b>	SSF, Northern, Traffic
<b>Location Contact:</b>	Christianne Vocal (650) 261-5339

<b>(D) Central San Mateo</b>	
<b>Address:</b>	800 North Humboldt Street, San Mateo, CA, 94401
<b>Pick-Up Location:</b>	With security at the entrance
<b>References:</b>	Central, San Mateo Superior Court Central, Central Branch
<b>Location Contact:</b>	Alessandra Robleto (650) 261-5171

**2.3. Security**

- a. **Access to Information** – Couriers will be granted access secure areas of court facilities and may come into incidental contact with sensitive information. Additionally, by nature, couriers will come into unrestricted access to sensitive documents that may contain information protected by law. All couriers agree to protect information that they come into contact with through the course of their duties in the strictest sense.

Additionally, the successful bidder takes full responsibility for the protection of sensitive and legally protected information in the possession of their employees. The successful bidder agrees to defend, and hold harmless, the court for any breach in relation to this paragraph.

- b. **Requirements of Employees** – As a condition of access to sensitive court facilities and protected information, all employees must complete, to the satisfaction of the Court and/or the San Mateo County Sheriff's Office, a California LiveScan background check, including FBI checks.
  - i. Background checks shall be conducted at the expense of the Successful Bidder. The Court shall not be liable for the costs or coordination involved in employee screening.

- c. **Permitted Employees** – Contractor shall provide a list, within 10 business days of the execution of an agreement, a list of all employees that may work under this agreement. This list shall be provided to the Court within 2 business days of any change.

- d. **Security Coordination** – Contractor is responsible for all coordination with the San Mateo County Sheriff's Office regarding facility access.

- e. **Adherence to Rules and Regulations** – Any Court Employee or any Sworn Officer of the County of San Mateo Sheriff's Office may reject any employee of a contractor from the facility that is does not adhere to the posted rules and regulations of the facility, applicable laws, or appears to be under the influence of drugs and/or alcohol in the execution of this agreement.

The Court may, at their sole discretion, demand, in writing, that an employee of the Successful Bidder no longer provides services under the resulting agreement. The Successful Bidder must

comply, immediately. The Successful bidder may appeal this decision to the Court's Procurement Officer, whose final decision shall be considered to be final.

**f. Identification** – Contractor shall, at all times while working under the agreement, be required to prominently display photo identification. Contractor's staff shall remain in a designated uniform at all times.

i. Contractor shall provide a narrative description of their employees' uniforms and identification badges to the Court within 10 business days of the execution of this agreement, as well as no less than 5 business days prior to a change in uniform or identification badge becoming effective.

ii. The Court and/or the San Mateo County Sheriff's Office shall have the right to refuse entry to or to eject from the building, any courier that is not in uniform or does not prominently display their identification badge in accordance with this provision. In such event, the courier's route shall be considered a no-show, or a late arrival if the courier returns after correcting the issue.

**g. County Identification** – At the Court's discretion, the Court may request that each courier be issued a Vendor ID Badge by the County of San Mateo Department of Public Works. If the court wishes to exercise this right, it will do so in writing. The Successful Bidder will ensure that affected employees comply within 5 business days unless agreed upon in writing.

**h. Vehicle Security** – Contractor shall ensure that all vehicles are equipped with the necessary equipment and features to ensure that court deliveries are not left unsecured at any time.

#### 2.4. Exception Handling

**a. Late Arrivals** – The Court may deduct from the agreed upon daily cost 5% for each delivery that is made late with the following exceptions:

i. **Documentable Egregious Circumstances** – Acts of God, Weather Events, Major Traffic Events. In each case, a memorandum must be submitted to the Court Program Manager within 1 business day.

ii. **When Agreed Upon** - The Court Program Manager may agree, in an individual circumstance, to approve the late arrival of the courier.

**b. No-Shows** – The Court shall only pay for each day of courier service provided.

i. In the event that a no-show is at the fault of the Contractor, as determined by the Court, the Court may deduct the cost of completing such services with another provider or its own staff from any future invoices.

#### 3.5 Reports

JBE Reports: Individual reports shall be made available to JBE as requested. Such reports may include but are not limited to:

- Invoice Reports
- Issues Reports
- Delivery Reports

**3.6 Acceptance Criteria.** The Services must meet the following acceptance criteria or the Court may reject the applicable Services or Deliverables. The JBE may use the attached Acceptance and Signoff Form to notify Contractor of the acceptance or rejection of the Services and Deliverables. Contractor will not be paid for any rejected Services or Deliverables.

**3.7 Project Managers.** The Court's project manager is: **Irene Maxwell**. The Court may change its project manager at any time upon notice to Contractor without need for an amendment to this Agreement. Contractor's project manager is: **TBD**. Subject to written approval by the JBE, Contractor may change its project manager without need for an amendment to this Agreement.

**3.8 Service Warranties.** Contractor warrants that: (i) the Services will be rendered with promptness and diligence and will be executed in a workmanlike manner, in accordance with the practices and professional standards used in well-managed operations performing services similar to the Services; and (ii) Contractor will perform the Services in the most cost-effective manner consistent with the required level of quality and performance.

**3.9 Resources.** Contractor is responsible for providing any and all facilities, materials and resources (including personnel, equipment and software) necessary and appropriate for performance of the Services and to meet Contractor's obligations under this Agreement.

**3.10 Commencement of Performance.** This Agreement is of no force and effect until signed by both parties and all JBE-required approvals are secured. Any commencement of performance prior to Agreement approval shall be at Contractor's own risk.

**3.11 Stop Work Orders.**

- a. The JBE may, at any time, by Notice to Contractor, require Contractor to stop all or any part of the Services for a period up to ninety (90) days after the Notice is delivered to Contractor, and for any further period to which the parties may agree ("Stop Work Order"). 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, Contractor shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the Services covered by the Stop Work Order during the period of stoppage. Contractor shall not invoice the JBE for Services suspended under the Stop Work Order. Within ninety (90) days after a Stop Work Order is delivered to Contractor, or within any extension of that period to which the parties shall have agreed, the JBE shall either (i) cancel the Stop Work Order; or (ii) terminate the Services covered by the Stop Work Order as provided for in 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, Contractor shall resume the performance of Services. The JBE shall make an equitable adjustment in the delivery schedule, the Contract Amount, or both, and the Agreement shall be amended, accordingly, if:
  - i. The Stop Work Order results in an increase in the time required for, or in Contractor's cost properly allocable to the performance of any part of this Agreement; and
  - ii. Contractor requests an equitable adjustment within thirty (30) days after the end of the period of stoppage; however, if the JBE decides the facts justify the action, the JBE may

receive and act upon a proposal submitted at any time before final payment under this Agreement.

- c. The JBE shall not be liable to Contractor for loss of profits because of a Stop Work Order issued under this provision.

**3.12 Acceptance or Rejection.** All Services, are subject to acceptance by the Court. The Court may reject any Services that (i) fail to meet applicable acceptance criteria, (ii) are not as warranted, or (iii) are performed or delivered late (without prior consent by the Court). If the Court rejects any Service (other than for late performance or delivery), Contractor shall modify such rejected Service, at no expense to the Court to correct the relevant deficiencies and shall redeliver such Service, to the Court within ten (10) business days after the Court's rejection, unless otherwise agreed in writing by the Court. Thereafter, the parties shall repeat the process set forth in this section until the Court accepts such corrected Service. The Court may terminate that portion of this Agreement which relates to a rejected Service at no expense to the Court if the Court rejects Service (i) for late performance or delivery, or (ii) on at least two (2) occasions for other deficiencies.



**ATTACHMENT 1  
ACCEPTANCE AND SIGNOFF FORM**

Description of Services provided by Contractor: \_\_\_\_\_

**Date submitted to the Court:** \_\_\_\_\_

The Services are:

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) Complete:  yes  no. If no, please identify incomplete aspects of the Services or Deliverables.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please note level of satisfaction:

Poor  Fair  Good  Very Good  Excellent

Comments, if any:

\_\_\_\_\_  
\_\_\_\_\_

The Services listed above are accepted.

The Services listed above are rejected.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

END OF ATTACHMENT

## APPENDIX B

### Payment Provisions

1. **General.** Subject to the terms of this Agreement, Contractor shall invoice the Court, and the Court shall compensate Contractor, as set forth in this Appendix B. The amounts specified in this Appendix shall be the total and complete compensation to be paid to Contractor for its performance under this Agreement. Contractor shall bear, and the Court shall have no obligation to pay or reimburse Contractor for, any and all other fees, costs, profits, taxes or expenses of any nature which Contractor incurs.

#### 2. Compensation for Services.

**2.1 Amount.** Contractor base rates are set forth in **IFB 41-25-I001** Attachment 2. Contractor will invoice the Court at the rates describe below: **TBD**

**2.2 Price Increases.** All pricing shall remain fixed for the initial term of this Agreement. If the Court elects to extend the term of this Agreement, the price adjustment factors will be used during the option period(s) and the price adjustment will be set forth in a written amendment to this Agreement. Any agreed-upon price adjustment may not exceed during any one-year option period the Consumer Price Index for All Urban Consumers as published by the U.S. Bureau of Labor Statistics.

**2.3 No Advance Payment.** The Court will not make any advance payment for Services.

**2.4 Overtime Rates.** Contractor shall not charge nor the Court pay any overtime rate.

3. **Expenses.** Except as set forth in this Appendix B, no expenses relating to Services shall be reimbursed by the Court.

#### 4. Invoicing and Payment

**4.1 Invoicing.** Contractor shall submit invoices to the Court in arrears no more frequently than monthly, Net 30. Contractor's invoices must include information and supporting documentation acceptable to the Court. Contractor shall adhere to reasonable billing guidelines issued by the Court from time to time.

**4.2 Payment.** The Court will pay each correct, itemized invoice received from Contractor after acceptance of the applicable Services, in accordance with the terms of this Agreement.

Notwithstanding any provision in this Agreement to the contrary, payments to Contractor are contingent upon the timely and satisfactory performance of Contractor's obligations under this Agreement.

**4.3 No Implied Acceptance.** Payment does not imply acceptance of Contractor's invoice Services. Contractor shall immediately refund any payment made in error. The Court shall have the right at any time to set off any amount owing from Contractor to the JBE against any amount payable by the JBE to Contractor under this Agreement.

**Taxes.** Unless otherwise required by law, the Court is exempt from federal excise taxes and no payment will be made for any personal property taxes levied on Contractor or on any taxes levied on employee wages. The JBE shall only pay for any state or local sales, service, use, or similar taxes imposed on the Services rendered or equipment, parts or software supplied to the JBE pursuant to this Agreement.

**APPENDIX C**  
**General Provisions**

**1. Provisions Applicable to Services**

**1.1 Qualifications.** Contractor shall assign to perform Services under this Agreement only persons who have sufficient training, education, and experience to successfully perform the Services. If the JBE is dissatisfied with any of Contractor's personnel, for any or no reason, Contractor shall replace them with qualified personnel.

**1.2 Turnover.** Contractor shall endeavor to minimize turnover of personnel Contractor has assigned to perform Services.

**1.3 Background Checks.** Contractor shall cooperate with the JBE if the JBE wishes to perform any background checks on Contractor's personnel by obtaining, at no additional cost, all releases, waivers, and permissions the JBE may require. Contractor shall not assign personnel to perform Services who refuse to undergo a background check. Contractor shall provide prompt notice to the JBE of (i) any person who refuses to undergo a background check, and (ii) the results of any background check requested by the JBE and performed by Contractor. Contractor shall ensure that the following persons are not assigned to perform Services for the JBE: (a) any person refusing to undergo a background check, and (b) any person whose background check results are unacceptable to Contractor or that, after disclosure to the JBE, the JBE advises are unacceptable to the JBE.

**2. Contractor Certification Clauses.** Contractor certifies that the following representations and warranties are true. Contractor shall cause its representations and warranties to remain true during the Term. Contractor shall promptly notify the JBE if any representation and warranty become untrue. Contractor represents and warrants as follows:

**2.1 Authority.** Contractor has authority to enter into and perform its obligations under this Agreement, and Contractor's signatory has authority to bind Contractor to this Agreement.

**2.2 Not an Expatriate Corporation.** Contractor is not an expatriate corporation or subsidiary of an expatriate corporation within the meaning of Public Contract Code section 10286.1 and is eligible to contract with the JBE.

**2.3 No Gratuities.** Contractor has not directly or indirectly offered or given any gratuities (in the form of entertainment, gifts, or otherwise), to any Judicial Branch Personnel with a view toward securing this Agreement or securing favorable treatment with respect to any determinations concerning the performance of this Agreement.

**2.4 No Conflict of Interest.** Contractor has no interest that would constitute a conflict of interest under Public Contract Code sections 10365.5, 10410 or 10411; Government Code sections 1090 et seq. or 87100 et seq.; or California Rules of Court, rules 10.103 and 10.104, which restrict employees and former employees from contracting with Judicial Branch Entities.

**2.5 No Interference with Other Contracts.** To the best of Contractor's knowledge, this Agreement does not create a material conflict of interest or default under any of Contractor's other contracts.

- 2.6 No Litigation.** No suit, action, arbitration, or legal, administrative, or other proceeding or governmental investigation is pending or threatened that may adversely affect Contractor's ability to perform the Services.
- 2.7 Compliance with Laws Generally.** Contractor complies in all material respects with all laws, rules, and regulations applicable to Contractor's business and services.
- 2.8 Drug Free Workplace.** Contractor provides a drug free workplace as required by California Government Code sections 8355 through 8357.
- 2.9 No Harassment.** Contractor does not engage in unlawful harassment, including sexual harassment, with respect to any persons with whom Contractor may interact in the performance of this Agreement, and Contractor takes all reasonable steps to prevent harassment from occurring.
- 2.10 No infringement.** The Services and Contractor's performance under this Agreement do not infringe, or constitute an infringement, misappropriation or violation of, any third party's intellectual property right.
- 2.11 Nondiscrimination.** 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 sections 12990 et seq.) and associated regulations (Code of Regulations, title 2, sections 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 will notify in writing each labor organization with which Contractor has a collective bargaining or other agreement of Contractor's obligations of nondiscrimination.
- 2.12 National Labor Relations Board Orders.** 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.

### 3. Insurance

- 3.1 Basic Coverage.** Contractor shall provide and maintain at the JBE's discretion and Contractor's expense the following insurance coverage during the Term:
- a. *Commercial General Liability.* The policy must be at least as broad as the Insurance Services Office (ISO) Commercial General Liability "occurrence" form, with coverage for liabilities arising out of premises, operations, independent contractors, products and completed operations, personal and advertising injury, and liability assumed under an insured contract. The policy must provide limits of at least \$1,000,000 per occurrence and annual aggregate.
  - b. *Workers Compensation and Employer's Liability.* The policy is required only if Contractor has employees. The policy must include workers' compensation to meet minimum requirements of the California Labor Code, and it must provide coverage for employer's liability bodily injury at minimum limits of \$1,000,000 per accident or disease.
  - c. *Automobile Liability.* This policy is required only if Contractor uses an automobile or other vehicle in the performance of this Agreement. The policy must cover bodily injury and

property damage liability and be applicable to all vehicles used in Contractor's performance of this Agreement whether owned, non-owned, leased, or hired. The policy must provide combined single limits of at least \$1,000,000 per occurrence.

- d. *Professional Liability*. This policy is required only if Contractor performs professional services under this Agreement. The policy must cover liability resulting from any act, error, or omission committed in Contractor's performance of Services under this Agreement, at minimum limits of \$1,000,000 per occurrence and annual aggregate. If the policy is written on a "claims made" form, Contractor shall maintain such coverage continuously throughout the Term and, without lapse, for a period of three (3) years beyond the termination and acceptance of all Services provided under this Agreement. The retroactive date or "prior acts inclusion date" of any such "claims made" policy must be no later than the date that activities commence pursuant to this Agreement.
- e. *Armored Car "All Risk Cargo Insurance"*. This policy covers currency, coin, checks and other valuables against all risks of physical loss of or damage to the insured property up to the stated liability limit while in the care, custody, or control of Contractor, its agents or employees. The minimum liability limit must be \$ 2,000,000.00.
- Exclusions as listed on the certificate of insurance.
  - Includes acts of employee theft and fidelity and covers crime and theft on premises and in transit.
  - Covers the theft, disappearance or destruction of money, securities, and property, including the cost of check reconstruction.
  - Covers dishonest or fraudulent acts, including forgery and alteration.

**3.2 Umbrella Policies.** Contractor may satisfy basic coverage limits through any combination of basic coverage and umbrella insurance.

**3.3 Aggregate Limits of Liability.** The basic coverage limits of liability may be subject to annual aggregate limits. If this is the case the annual aggregate limits of liability must be at least two (2) times the limits required for each policy, or the aggregate may equal the limits required but must apply separately to this Agreement.

**3.4 Deductibles and Self-Insured Retentions.** Contractor shall declare to the JBE all deductibles and self-insured retentions that exceed \$100,000 per occurrence. Any increases in deductibles or self-insured retentions that exceed \$100,000 per occurrence are subject to the JBE's approval. Deductibles and self-insured retentions do not limit Contractor's liability.

**3.5 Additional Insured Endorsements.** Contractor's commercial general liability policy, automobile liability policy, and, if applicable, umbrella policy must be endorsed to name the following as additional insureds with respect to liabilities arising out of the performance of this Agreement: the JBE, the State of California, the Judicial Council of California, and their respective judges, subordinate judicial officers, executive officers, administrators, officers, officials, agents, representatives, contractors, volunteers or employees.

**3.6 Certificates of Insurance.** Before Contractor begins performing Services, Contractor shall give the JBE certificates of insurance attesting to the existence of coverage. Contractor shall provide prompt written notice to the JBE in the event that insurance coverage is cancelled or materially changed from the coverage set forth in the current certificate of insurance provided to the JBE.

- 3.7 Endorse for Material Change or Cancellation.** All insurance policies required under this “Basic Coverage” section shall be endorsed to provide that coverage will not be materially changed or cancelled without thirty (30) days prior notice to the JBE.
- 3.8 Notice of Cancellation, Termination or Amendment.** Contractor shall immediately notify the JBE should any Basic Coverage insurance policy be canceled, terminated, or amended to reduced coverage within thirty (30) days’ prior written notice to such change taking place.
- 3.9 Qualifying Insurers.** For insurance to satisfy the requirements of this section, all required insurance must be issued by an insurer with an A.M. Best rating of A - or better that is approved to do business in the State of California.
- 3.10 Required Policy Provisions.** Each policy must provide, as follows: (i) the policy is primary and noncontributory with any insurance or self-insurance maintained by Judicial Branch Entities and Judicial Branch Personnel, and the basic coverage insurer waives any and all rights of subrogation against Judicial Branch Entities and Judicial Branch Personnel; (ii) the insurance applies separately to each insured against whom a claim is made or a lawsuit is brought, to the limits of the insurer’s liability; and (iii) each insurer waives any right of recovery or subrogation it may have against the JBE, the State of California, the Judicial Council of California, and their respective judges, subordinate judicial officers, executive officers, administrators, officers, officials, agents, representatives, contractors, volunteers or employees for loss or damage.
- 3.11 Partnerships.** If Contractor is an association, partnership, or other joint business venture, the basic coverage may be provided by either (i) separate insurance policies issued for each individual entity, with each entity included as a named insured or as an additional insured; or (ii) joint insurance program with the association, partnership, or other joint business venture included as a named insured.
- 3.12 Consequence of Lapse.** If required insurance lapses during the Term, the JBE is not required to process invoices after such lapse until Contractor provides evidence of reinstatement that is effective as of the lapse date.
- 4. Indemnity.** Contractor will defend (with counsel satisfactory to the JBE or its designee), indemnify and hold harmless the Judicial Branch Entities and the Judicial Branch Personnel against all claims, losses, and expenses, including attorneys’ fees and costs, that arise out of or in connection with (i) an act or omission of Contractor, its agents, employees, independent contractors, or subcontractors in the performance of this Agreement, (ii) a breach of a representation, warranty, or other provision of this Agreement, and (iii) infringement of any trade secret, patent, copyright or other third party intellectual property. This indemnity applies regardless of the theory of liability on which a claim is made or a loss occurs. This indemnity will survive the expiration or termination of this Agreement, and acceptance of any Services. Contractor shall not make any admission of liability or other statement on behalf of an indemnified party or enter into any settlement or other agreement which would bind an indemnified party, without the JBE’s prior written consent, which consent shall not be unreasonably withheld; and the JBE shall have the right, at its option and expense, to participate in the defense and/or settlement of a claim through counsel of its own choosing. Contractor’s duties of indemnification exclude indemnifying a party for that portion of losses and expenses that are finally determined by a reviewing court to have arisen out of the sole negligence or willful misconduct of the indemnified party.
- 5. Option Term.** The JBE may, at its sole option, extend this Agreement for up to 2 consecutive one-year terms, at the end of which Option Terms this Agreement shall expire. In order to exercise an Option Term, the JBE must send Notice to Contractor at least thirty (30) days prior to the end of the Initial Term (or the then-current Option Term).

**6. Tax Delinquency.** Contractor must provide notice to the JBE immediately if Contractor has reason to believe it may be placed on either (i) the California Franchise Tax Board's list of 500 largest state income tax delinquencies, or (ii) the California Board of Equalization's list of 500 largest delinquent sales and use tax accounts. The JBE may terminate this Agreement immediately "for cause" pursuant to Section 7.2 below if (i) Contractor fails to provide the notice required above, or (ii) Contractor is included on either list mentioned above.

## **7. Dispute Resolution**

### **7.1 Informal Resolution**

- a. Contractor and the JBE will attempt, in good faith, to resolve informally any disputes under this Agreement. If the dispute involves this Agreement, Contractor must meet with the JBE's project manager to discuss the matter and any actions necessary to resolve the dispute informally.
- b. If the JBE and Contractor are unable to resolve the dispute as described above then the Finance Directors (or the equivalent) of the JBE and Contractor, respectively, will meet to discuss the matter and any actions necessary to resolve the dispute informally.

### **7.2 Escalation:**

- a. If the dispute is not resolve informally as described above, then either party to the dispute may issue a written Notice of dispute to the other party. Following the issuance 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.
- b. Each party to the dispute will comply with reasonable requests for additional information. Any additional information will be provided to the requesting party fifteen (15) days after receipt of a written request from the requesting party, unless otherwise agreed.

**7.3 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.

**7.4 Performance During Dispute Resolution.** Pending final resolution of any dispute, Contractor agrees to proceed diligently with the performance of the Services, including, any Services under dispute, unless otherwise directed. Contractor's failure to diligently proceed with the Services will be considered a material breach of this Agreement.

## **8. Termination**

**8.1 Termination for Convenience.** The JBE may terminate, in whole or in part, this Agreement for convenience upon thirty (30) days prior Notice. After receipt of such Notice, and except as otherwise directed by the JBE, Contractor shall immediately: stop Services as specified in the Notice.

**8.2 Termination for Cause.** The JBE may terminate this Agreement, in whole or in part, immediately "for cause" if (i) Contractor fails or is unable to meet or perform any of its duties under this Agreement, and this failure is not cured within ten (10) days following Notice of default (or in the opinion of the JBE, is not capable of being cured within this cure period); (ii) Contractor or Contractor's creditors file a petition as to Contractor's bankruptcy or insolvency, or Contractor is declared bankrupt, becomes insolvent, makes an assignment for the benefit of creditors, goes into liquidation or receivership, or otherwise loses legal control of its business; or (iii) Contractor makes

or has made under this Agreement any representation, warranty, or certification that is or was incorrect, inaccurate, or misleading.

**8.3 Termination for Changes in Budget or Law.** The JBE's payment obligations under this Agreement are subject to annual appropriation and the availability of funds. Expected or actual funding may be withdrawn, reduced, or limited prior to the expiration or other termination of this Agreement. Funding beyond the current appropriation year is conditioned upon appropriation of sufficient funds to support the activities described in this Agreement. The JBE may terminate this Agreement or limit Contractor's Services (and reduce proportionately Contractor's fees) upon Notice to Contractor without prejudice to any right or remedy of the JBE if: (i) expected or actual funding to compensate Contractor is withdrawn, reduced or limited; or (ii) the JBE determines that Contractor's performance under this Agreement has become infeasible due to changes in applicable laws.

**8.4 Rights and Remedies of the JBE.**

- a. *Nonexclusive Remedies.* All remedies provided in this Agreement may be exercised individually or in combination with any other available remedy. Contractor shall notify the JBE immediately if Contractor is in default, or if a third-party claim or dispute is brought or threatened that alleges facts that would constitute a default under this Agreement. If Contractor is in default, the JBE may do any of the following: (i) withhold all or any portion of a payment otherwise due to Contractor, and exercise any other rights of setoff as may be provided in this Agreement or any other agreement between a JBE and Contractor; (ii) require Contractor to enter into nonbinding mediation; (iii) exercise, following Notice, the JBE's right of early termination of this Agreement as provided herein; and (iv) seek any other remedy available at law or in equity.
- b. *Replacement.* If the JBE terminates this Agreement in whole or in part for cause, the JBE may acquire from third parties, under the terms and in the manner the JBE considers appropriate, Services equivalent to those terminated, and Contractor shall be liable to the JBE for any excess costs for those Services. Notwithstanding any other provision of this Agreement, in no event shall the excess cost to the JBE for such Services be excluded under this Agreement as indirect, incidental, special, exemplary, punitive or consequential damages of the JBE. Contractor shall continue any Services not terminated hereunder.

**8.5 Survival.** Termination or expiration of this Agreement shall not affect the rights and obligations of the parties which arose prior to any such termination or expiration (unless otherwise provided herein) and such rights and obligations shall survive any such termination or expiration. Rights and obligations which by their nature should survive shall remain in effect after termination or expiration of this Agreement, including any section of this Agreement that states it shall survive such termination or expiration.

**9. Assignment and Subcontracting.** Contractor may not assign or subcontract its rights or duties under this Agreement, in whole or in part, whether by operation of law or otherwise, without the prior written consent of the JBE. Consent may be withheld for any reason or no reason. Any assignment or subcontract made in contravention of the foregoing shall be void and of no effect. Subject to the foregoing, this Agreement will be binding on the parties and their permitted successors and assigns.

**10. Notices.** Notices must be sent to the following address and recipient:



If to Contractor:	If to the JBE:
<p>TBD</p> <p><u>With a copy to:</u></p>	<p>Irene Maxwell  <a href="mailto:imaxwell@sanmateocourt.org">imaxwell@sanmateocourt.org</a>                      Superior Court of California, San Mateo County                      Hall of Justice, 400 County Center                      Redwood City,                      CA, 94063</p> <p><u>With a copy to:</u>                      Cesia Velazquez Berg, Business Services Manager  <a href="mailto:Cvelazquez@sanmateocourt.org">Cvelazquez@sanmateocourt.org</a></p>

Either party may change its address for Notices by giving the other party Notice of the new address in accordance with this section. Notices will be considered to have been given at the time of actual delivery in person, three (3) days after deposit in the mail as set forth above, or one (1) day after delivery to an overnight air courier service.

**11. Provisions Applicable to Certain Agreements.** The provisions in this section are applicable only to the types of orders specified in the first sentence of each subsection. If this Agreement is not of the type described in the first sentence of a subsection, then that subsection does not apply to the Agreement.

**11.1 Union Activities Restrictions.** *If the Contract Amount is over \$50,000, this section is applicable.* Contractor agrees that no JBE funds received under this Agreement will be used to assist, promote or deter union organizing during the Term. If Contractor incurs costs, or makes expenditures to assist, promote or deter union organizing, Contractor will maintain records sufficient to show that no JBE funds were used for those expenditures. Contractor will provide those records to the Attorney General upon request.

**11.2 Domestic Partners, Spouses, Gender, and Gender Identity Discrimination.** *If the Contract Amount is \$100,000 or more, this section is applicable.* Contractor is in compliance with, and throughout the Term will remain in compliance with: (i) PCC 10295.3 which places limitations on contracts with contractors who discriminate in the provision of benefits on the basis of marital or domestic partner status; and (ii) PCC 10295.35, which places limitations on contracts with contractors that discriminate in the provision of benefits on the basis of an employee’s or dependent’s actual or perceived gender identity.

**11.3 Child Support Compliance Act.** *If the Contract Amount is \$100,000 or more, this section is applicable.* Contractor recognizes the importance of child and family support obligations and fully complies with (and will continue to comply with during the Term) all applicable state and federal laws relating to child and family support enforcement, including 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.

**11.4 DVBE Commitment.** *This section is applicable if Contractor received a disabled veteran business enterprise (“DVBE”) incentive in connection with this Agreement.* Contractor’s failure to meet the DVBE commitment set forth in its bid or proposal constitutes a breach of the Agreement. If

Contractor used DVBE subcontractor(s) in connection with this Agreement: (i) Contractor must use the DVBE subcontractors identified in its bid or proposal, unless the JBE approves in writing replacement by another DVBE subcontractor in accordance with the terms of this Agreement; and (ii) Contractor must complete and return to the JBE a post-contract certification form promptly upon completion of the awarded contract, and by no later than the date of submission of Contractor's final invoice to the JBE. (The post-contract certification form is located at: <https://www.courts.ca.gov/documents/JBCM-Post-Contract-Certification-Form.docx>) If the Contractor fails to do so, the JBE will withhold \$10,000 from the final payment, or withhold the full payment if it is less than \$10,000, until the Contractor submits a complete and accurate post-contract certification form. The JBE shall allow the Contractor to cure the deficiency after written notice of the Contractor's failure to complete and submit an accurate post-contract certification form. Notwithstanding the foregoing and any other law, if after at least 15 calendar days, but no more than 30 calendar days, from the date of the written notice the Contractor refuses to comply with these certification requirements, the JBE shall permanently deduct \$10,000 from the final payment, or the full payment if less than \$10,000. The post-contract certification form shall include: (1) the total amount of money Contractor received under the Agreement, (2) the total amount of money and the percentage of work that Contractor committed to provide to each DVBE subcontractor; (3) the name and address of each DVBE subcontractor to which Contractor subcontracted work in connection with the Agreement; (4) the amount of money each DVBE subcontractor actually received from Contractor in connection with the Agreement, and the corresponding percentage this payment comprises of the total amount of money Contractor received under the Agreement; and (5) that all payments under the Agreement have been made to the applicable DVBE subcontractors. Upon request by the JBE, Contractor shall provide proof of payment for the work. A person or entity that knowingly provides false information shall be subject to a civil penalty for each violation. Contractor will comply with all rules, regulations, ordinances and statutes that govern the DVBE program, including, without limitation, Military and Veterans Code section 999.5.

**11.5 Antitrust Claims.** *If this Agreement resulted from a competitive solicitation, this section is applicable.* Contractor shall assign to the JBE 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 the JBE. Such assignment shall be made and become effective at the time the JBE tenders final payment to Contractor. If the JBE receives, either through judgment or settlement, a monetary recovery for a cause of action assigned under this section, Contractor shall be entitled to receive reimbursement for actual legal costs incurred and may, upon demand, recover from the JBE any portion of the recovery, including treble damages, attributable to overcharges that were paid by Contractor but were not paid by the JBE as part of the bid price, less the expenses incurred in obtaining that portion of the recovery. Upon demand in writing by Contractor, the JBE shall, within one (1) year from such demand, reassign the cause of action assigned under this part if Contractor has been or may have been injured by the violation of law for which the cause of action arose and (a) the JBE has not been injured thereby, or (b) the JBE declines to file a court action for the cause of action.

**11.6 Good Standing.** *If Contractor is a corporation, limited liability company, or limited partnership, and this Agreement is performed in whole or in part in California, this section is applicable.* Contractor is, and will remain for the Term, qualified to do business and in good standing in California.

**11.7 Small Business Preference Commitment.** *This section is applicable if Contractor received a small business preference in connection with this Agreement.* Contractor's failure to meet the small business commitment set forth in its bid or proposal constitutes a breach of this Agreement. Contractor must within sixty (60) days of receiving final payment under this Agreement report to the JBE the actual percentage of small/micro business participation that was achieved. If Contractor is a nonprofit veteran service agency ("NVSA"), Contractor must employ veterans receiving services from the NVSA for not less than 75 percent of the person-hours of direct labor required for the production of goods and the provision of services performed pursuant to this Agreement.

## **12. Miscellaneous Provisions.**

**12.1 Independent Contractor.** Contractor is an independent contractor to the JBE. No employer-employee, partnership, joint venture, or agency relationship exists between Contractor and the JBE. Contractor has no authority to bind or incur any obligation on behalf of the JBE. If any governmental entity concludes that Contractor is not an independent contractor, the JBE may terminate this Agreement immediately upon Notice.

**12.2 GAAP Compliance.** Contractor maintains an adequate system of accounting and internal controls that meets Generally Accepted Accounting Principles.

**12.3 Audit.** Contractor must allow the JBE or its designees to review and audit Contractor's (and any subcontractors') documents and records relating to this Agreement, and Contractor (and its subcontractors) shall retain such documents and records for a period of four (4) years following final payment under this Agreement. If an audit determines that Contractor (or any subcontractor) is not in compliance with this Agreement, Contractor shall correct errors and deficiencies by the twentieth (20th) day of the month following the review or audit. If an audit determines that Contractor has overcharged the JBE five percent (5%) or more during the time period subject to audit, Contractor must reimburse the JBE in an amount equal to the cost of such audit. This Agreement is subject to examinations and audit by the State Auditor for a period three (3) years after final payment.

**12.4 Licenses and Permits.** Contractor shall obtain and keep current all necessary licenses, approvals, permits and authorizations required by applicable law for the performance of the Services. Contractor will be responsible for all fees and taxes associated with obtaining such licenses, approvals, permits and authorizations, and for any fines and penalties arising from its noncompliance with any applicable law.

**12.5 Confidential Information.** During the Term and at all times thereafter, Contractor will: (a) hold all Confidential Information in strict trust and confidence, (b) refrain from using or permitting others to use Confidential Information in any manner or for any purpose not expressly permitted by this Agreement, and (c) refrain from disclosing or permitting others to disclose any Confidential Information to any third party without obtaining the JBE's express prior written consent on a case-by-case basis. Contractor will disclose Confidential Information only to its employees or contractors who need to know that information in order to perform Services hereunder and who have executed a confidentiality agreement with Contractor at least as protective as the provisions of this section. The provisions of this section shall survive the expiration or termination of this Agreement. Contractor will protect the Confidential Information from unauthorized use, access, or disclosure in the same manner as Contractor protects its own confidential or proprietary information of a similar nature, and with no less than the greater of reasonable care and industry-

standard care. The JBE owns all right, title and interest in the Confidential Information. Contractor will notify the JBE promptly upon learning of any unauthorized disclosure or use of Confidential Information and will cooperate fully with the JBE to protect such Confidential Information. Upon the JBE's request and upon any termination or expiration of this Agreement, Contractor will promptly (a) return to the JBE or, if so directed by the JBE, destroy all Confidential Information (in every form and medium), and (b) certify to the JBE in writing that Contractor has fully complied with the foregoing obligations. Contractor acknowledges that there can be no adequate remedy at law for any breach of Contractor's obligations under this section, that any such breach will likely result in irreparable harm, and that upon any breach or threatened breach of the confidentiality obligations, the JBE shall be entitled to appropriate equitable relief, without the requirement of posting a bond, in addition to its other remedies at law.

**12.6 Publicity.** Contractor shall not make any public announcement or press release about this Agreement without the prior written approval of the JBE.

**12.7 Choice of Law and Jurisdiction.** California law, without regard to its choice-of-law provisions, governs this Agreement. The parties shall attempt in good faith to resolve informally and promptly any dispute that arises under this Agreement. Jurisdiction for any legal action arising from this Agreement shall exclusively reside in state or federal courts located in California, and the parties hereby consent to the jurisdiction of such courts.

**12.8 Negotiated Agreement.** This Agreement has been arrived at through negotiation between the parties. Neither party is the party that prepared this Agreement for purposes of construing this Agreement under California Civil Code section 1654.

**12.9 Amendment and Waiver.** Except as otherwise specified in this Agreement, no amendment or change to this Agreement will be effective unless expressly agreed in a writing signed by a duly authorized officer of the JBE. A waiver of enforcement of any of this Agreement's terms or conditions by the JBE is effective only if expressly agreed in writing by a duly authorized officer of the JBE. Any waiver or failure to enforce any provision of this Agreement on one occasion will not be deemed a waiver of any other provision or of such provision on any other occasion.

**12.10 Force Majeure.** Neither party shall be liable to the other for any delay in or failure of performance, nor shall any such delay in or failure of performance constitute default, if such delay or failure is caused by a force majeure. Force majeure, for purposes of this paragraph, is defined as follows: acts of war and acts of god, such as earthquakes, floods, and other natural disasters, such that performance is impossible.

**12.11 Severability.** If any part of this Agreement is held unenforceable, all other parts remain enforceable.

**12.12 Headings; Interpretation.** All headings are for reference purposes only and do not affect the interpretation of this Agreement. The word "including" means "including, without limitation." Unless specifically stated to the contrary, all references to days herein shall be deemed to refer to calendar days.

**12.13 Time of the Essence.** Time is of the essence in Contractor's performance under this Agreement.

**12.14 Counterparts.** This Agreement may be executed in counterparts, each of which is considered an original.

## APPENDIX D

Defined Terms as used in this Agreement, the following terms have the indicated meanings:

**“Agreement”** is defined on the Coversheet.

**“Contractor”** is defined on the Coversheet.

**“Confidential Information”** means: (i) any information related to the business or operations of the JBE, including information relating to the JBE’s personnel and users; and (ii) all financial, statistical, personal, technical and other data and information of the JBE (and proprietary information of third parties provided to Contractor) which is designated confidential or proprietary, or that Contractor otherwise knows, or would reasonably be expected to know, is confidential. Confidential Information does not include information that Contractor demonstrates to the JBE’s satisfaction that: (a) Contractor lawfully knew prior to the JBE’s first disclosure to Contractor, (b) a third party rightfully disclosed to Contractor free of any confidentiality duties or obligations, or (c) is, or through no fault of Contractor has become, generally available to the public.

**“Contract Amount”** is defined on the Coversheet.

**“Coversheet”** refers to the first page of this Agreement.

**“Effective Date”** is defined on the Coversheet.

**“Emergency”** An unforeseen combination of circumstances, event or situation which jeopardizes the health, safety and/or welfare of the JBE. This includes acts of Force Majeure.

**“Expiration Date”** is the later of (i) the day so designated on the Coversheet, and (ii) the last day of any Option Term.

**“Initial Term”** is the period commencing on the Effective Date and ending on the Expiration Date designated on the Coversheet.

**“JBE”** is defined on the Coversheet.

**“Judicial Branch Entities”** means any California superior or appellate court, the Judicial Council of California, and the Habeas Corpus Resource Center.

**“Judicial Branch Personnel”** means members, justices, judges, judicial officers, subordinate judicial officers, employees, and agents of a JBE.

**“Notice”** means a written communication from one party to another that is (a) delivered in person, (b) sent by registered or certified mail, or (c) sent by overnight air courier, in each case properly posted and fully prepaid to the appropriate address and recipient set forth in Appendix C.

**“Option Term”** means a period, if any, through which this Agreement may be or has been extended by the JBE.

**“Original Occurrence”** means the date of loss of date of mishandled funds

**“Services”** is defined in Appendix A.

**“Stop Work Order”** is defined in Appendix A.

**“Term”** comprises the Initial Term and any Option Terms.