

# TASK ORDER SERVICE AGREEMENT Rev. 7/12/16

For use on any CSU project.

This AGREEMENT is made and entered into this [Day] day of [Month], [Year] pursuant to the Public Contract Code 10700, *et seq.*, by and between the Trustees of the California State University on behalf of

<i>Campus, hereafter referred to as Trustees, and</i> <b>California State University Lorem Ipsum</b>	Amendment No.: <b>123456</b>	Agreement No.: <b>123456</b>	Project No.: <b>123456</b>
<i>Service Provider, hereafter referred to as Service Provider.</i> <b>Ipsum Lorem Service Provider, Inc.</b>		CSU Vendor ID No.: <b>123456</b>	License or DIR No.: <b>123456</b>

WITNESSETH: That the Service Provider in consideration of the statements and conditions herein contained, agrees to furnish labor, materials, and equipment and to perform work necessary to complete, in a skillful manner: [Provide a brief [summary description of the work] for [Project Name] located at [Campus Name].

The Service Provider shall provide such services as more fully described in the following Rider and Exhibits, which by this reference are incorporated herein and made part of this Agreement:

- |         |   |                                       |                                  |
|---------|---|---------------------------------------|----------------------------------|
| Rider   | A | Agreement General Provisions,         | consisting of four (4) pages;    |
| Rider   | B | Supplementary General Provisions,     | consisting of [Number] pages;    |
| Exhibit | A | Individual Task Order,                | pages will vary with Task Order; |
| Exhibit | B | Service Provider Hourly Rate Schedule | consisting of [Number] pages.    |

The term shall begin upon receipt of an executed Agreement from the Trustees and shall end as of [Date]. Work elements started during the term shall continue to their completion and acceptance by the Trustees.

The Service Provider shall not perform services in excess of the Agreement without prior written authorization to proceed from the Trustees.

Service Provider shall report to: [Campus and Name of Project Administrator]

The basic services amount to be expended under this Agreement shall not exceed [Insert Value].

Payment shall be made in accordance with Rider A and Exhibits A, B, C.

Trustees of the California State University							Service Provider						
Campus <b>California State University Lorem Ipsum</b>							Firm Name <b>Ipsum Lorem Service Provider, Inc.</b>						
By (Trustees' Authorized Signature)							By (Authorized Signature)						
Printed Name and Title of Person Signing <b>John Smith, Campus Representative</b>							Printed Name and Title of Person Signing <b>Jack Smith, Service Provider Authorized Signatory</b>						
Address of Campus Project Administrator <b>99999 Lorem Ipsum Drive, Ipsum, CA 99999</b>							Address of Service Provider <b>11111 Ipsum Lorem Drive, Lorem CA 11111</b>						
SCO Acct Data:	Fund <b>123456</b>	Sub Fund <b>123456</b>	Agency <b>123456</b>	Yr.	Ref/Item <b>123456</b>	Category <b>123456</b>	Program <b>123456</b>	Element <b>123456</b>	Component <b>123456</b>	Chapter <b>123456</b>	Fiscal Yr. <b>123456</b>	Legal Ref. <b>123456</b>	
Fund Name <b>123456</b>				PS Account <b>123456</b>		PS Fund <b>123456</b>		PS Dept. ID <b>123456</b>		PS Program <b>123456</b>		PS Class <b>123456</b>	PS Project/Grant <b>123456</b>
Amount Encumbered <b>\$999,999,999</b>		<i>I hereby certify upon my personal knowledge that budgeted funds are available for the period and purpose of the expenditures stated above.</i>											
Amount of Increase <b>\$999,999,999</b>		Signature of Accounting Officer										Date	
Amount of Decrease <b>\$999,999,999</b>		<i>I hereby certify that I have examined the written Agreement and find the same to be in accordance with the requirements of California State University Contract Law. FRAMROZE M. VIRJEE, General Counsel</i>											
Total Amount Encumbered <b>\$999,999,999</b>		By Attorney										Date	

*This Agreement may be executed in counterparts all of which taken together shall constitute one and the same Agreement. The exchange of copies of this Agreement by electronic mail in "portable document format" (.PDF) form or by other similar electronic means shall constitute effective execution and delivery of this Agreement and shall have the same effect as copies executed and delivered with original signatures.*

### Rider A - Agreement General Provisions

1. **Service Provider Relationship.** Service Provider, in the performance of this Agreement, is an independent contractor and is not an employee, agent, or officer of the Trustees.
2. **Payments.** Payments under this Agreement shall be made in arrears of work increment completed to the satisfaction of the Trustees and upon submission of an invoice in CSU invoice format. If not otherwise specified payments for services rendered will be processed monthly upon presentation of invoice.
3. **Services.** Trustees may issue a written order with respect to the services to be performed under this Agreement at any time before the completion of the services. Trustees shall pay Service Provider an amount for such services as provided in this Agreement, or if not so provided, Trustees shall pay Service Provider a reasonable amount, which shall be agreed upon by the parties.
4. **Service Provider shall not utilize any information, not a matter of public record, which is received by reason of this Agreement, for pecuniary gain not contemplated by the terms of this Agreement, regardless of whether Service Provider is or is not under contract at the time such gain is realized (Education Code Section 89006).**
5. **Ownership.** The report, survey, or other product developed by Service Provider pursuant to this Agreement is the property of Trustees, and shall not be disseminated to others by Service Provider unless authorized by Trustees.
6. **Termination for Convenience.** Trustees may terminate this Agreement upon a three (3) business-day advance written notice to Service Provider. In the event of such termination, Service Provider shall be paid only for the work satisfactorily completed.
7. **Termination for Cause.** Trustees may terminate this Agreement for cause should Service Provider fail to perform as herein provided. In the event of such termination, Trustees shall be relieved of the obligation to make any payment to Service Provider and Trustees may proceed by other means with the work in any manner the Trustees deem proper.
8. **Indemnification.** The Service Provider agrees to hold harmless, defend, and indemnify the State of California, the Trustees of the California State University, the University, and the officers, employees representatives, and agents of each of them from any and all claims, damages, losses, causes of action and demands, and all costs and expenses incurred in connection therewith, including, but not limited to, attorneys' fees and costs resulting from or in any manner arising out of or in connection with any negligent act or omission or willful misconduct on the part of the Service Provider, its officers, agents, and employees, in the performance of this Agreement. This provision shall survive the expiration or termination of this Agreement.
9. **Insurance Provisions.** The Service Provider shall not commence work until the Trustees have received evidence of the insurance required in this section and approved it.  
Service Provider shall obtain the following policies and coverage. The insurance furnished by the Service Provider under this section shall provide coverage in amounts not less than the following, unless a different amount is stated in Exhibit A, Scope of Work Description:
  - a. **Comprehensive or Commercial Form General Liability Insurance:**  
On an occurrence basis, cover work done or to be done by or on behalf of the Service Provider and shall provide insurance coverage for bodily injury, personal injury, property damage, and contractual liability. The aggregate limit shall apply separately to the work. Limits of Liability:  

\$2,000,000	General Aggregate
\$1,000,000	Each Claim - combined single limit for bodily injury and property damage.
  - b. **Business Automobile Liability Insurance:**  
On an occurrence basis, cover owned, scheduled, hired, and non-owned automobiles used by or on behalf of the Service Provider and shall provide insurance coverage for bodily injury, property damage, and contractual liability. Use Insurance Service Office (ISO) Form Number CA 0001 covering any automobile. Limits of Liability:  

\$1,000,000	Each Accident - combined single limit for bodily injury and property damage.
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- c. **Workers' Compensation Insurance:**  
This insurance shall include Employers Liability limits of \$1,000,000 and other limits required under California law.
- d. **Professional Liability Insurance:**  
Professional liability (errors and omissions) insurance on an occurrence basis is preferred, covering work done or to be done by or on behalf of the Service Provider and providing insurance for professional liability in the amount of \$1,000,000 each occurrence. The Service Provider shall obtain and maintain professional liability insurance on a claims-made basis for no less than \$1,000,000 each claim and \$2,000,000 annual aggregate, and certification of coverage shall be submitted to the Trustees upon signing of this Agreement. If the total contract amount exceeds \$1,000,000 the Service Provider shall renew and keep such insurance in effect for at least ten (10) years after the recordation of the notice of completion.

Insurers shall be authorized in the State of California to transact insurance and shall hold a current A.M. Best's rating of no less than **A: VII** or alternatively a carrier acceptable to the Trustees.

Verification of coverage shall be provided as follows:

- a. The Service Provider shall submit to the Trustees copies of certificates of insurance and endorsements to the policies of insurance required by the Agreement as evidence of the insurance coverage.
- b. The scope of coverage shall be shown on the certificate of insurance.
- c. The Service Provider shall provide written notice of cancellation of coverage within thirty (30) days to the Trustees.
- d. The Service Provider shall notify the Trustees in writing of any material change in insurance coverage.
- e. Renewal certifications shall be timely filed by the Service Provider for coverage until the work is accepted as complete.

Insurance policies except for Workers Compensation and Professional Liability insurance shall contain, or be endorsed to contain, the following provisions:

- a. For the general and automobile liability policies, the State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents shall be covered as additional insureds.
- b. For claims related to the work, the Service Provider's insurance coverage shall be primary insurance as respects the State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents. Insurance or self-insurance maintained by the State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents shall be in excess of the Service Provider's insurance and shall not contribute with it.
- c. The State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents shall not by reason of their inclusion as additional insureds incur liability to the insurance carriers for payment of premiums for such insurance.

**Additional Insurance Provisions**

- a. Any deductible under any policy of insurance required in this section shall be the Service Provider's liability.
- b. Acceptance of certificates of insurance by the Trustees shall not limit the Service Provider's liability under the Agreement.
- c. The Service Provider's obligations to obtain and maintain required insurance are non-delegable duties under this Agreement.

- 10. **Personal Eligibility Certification.** If the Service Provider is a natural person, the Service Provider certifies by signing this Agreement that s/he is a citizen or national of the United States or otherwise qualified to receive public benefits under the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (P.L. 104-193; 110 STAT. 2105, 2268-69), State of California Governor's Executive Order W-135-96.

11. Corporate Eligibility Certification. If the Service Provider is a corporation, the Service Provider certifies and declares by signing this Agreement that it is eligible to contract with the State of California pursuant to the California Taxpayer and Shareholder Protection Act of 2003 (Public Contract Code Section 10286, *et seq.*).
12. Nondiscrimination. In the performance of this Agreement the Service Provider and its consultants shall not deny the Agreement's benefits nor shall they discriminate unlawfully against any person on the basis of religion, color, ethnic group identification, sex, actual or perceived gender identity, age, physical or mental disability, medical condition, marital status, or age (over 40). Additionally, the Service Provider and its consultants shall insure that the evaluation and treatment of employees and applicants for employment are free of such discrimination as well.
  - a. Service Provider shall comply with the provisions of the Fair Employment and Housing Act (Government Code Section 12900, *et seq.*), the regulations promulgated thereunder (California Code of Regulations, Title 2, Sections 7285.0, *et seq.*), and the provisions of Article 9.5, Chapter 1, Part 1, Division 3, Title 2 of the Government Code (Government Code Sections 11135-11139.5).
  - b. Service Provider shall permit access by representatives of the California Department of Fair Employment and Housing and the Trustees upon reasonable notice at times during normal business hours with at least 24 hours' notice, to its books, records, accounts, other sources of information, and its facilities as the Department or Trustees shall require to ascertain compliance with this Agreement.
  - c. Service Provider and its consultants/subcontractors shall give written notice of their obligations under this Agreement to labor organizations with which they have a collective bargaining or other agreement.
  - d. Service Provider shall include the nondiscrimination and compliance provisions of this Agreement in subcontracts to perform work under the Agreement (Government Code Sections 12990, 11135, *et seq.*, Title 2, California Code of Regulations, Section 11105)
13. Drug Free Workplace Certification. The Service Provider hereby certifies compliance with Government Code Sections 8355, 8356, and 8357 in matters relating to providing a drug-free workplace. In accordance with Government Code Section 8355, the Service Provider shall:
  - a. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations;
  - b. Establish a Drug-Free Awareness Program to inform employees about all of the following:
    1. The dangers of drug abuse in the workplace,
    2. The Service Provider's policy of maintaining a drug-free workplace,
    3. Any available counseling, rehabilitation, and employee assistance programs, and
    4. Penalties that may be imposed upon employees for drug abuse violations;
  - c. Require that each employee engaged in the performance of the Agreement be given a copy of the statement required by subpart A, and require that each employee, as a condition of employment on the Agreement, agree to abide by the terms of the statement.
14. Disabled Veteran Business Enterprise. Responsive to direction from the State Legislature (Public Contract Code Section 10115, *et seq.*), the Trustees are seeking to increase the statewide participation of disabled veteran business enterprises in contract awards. To this end, Service Provider shall inform the Trustees of any contractual arrangements with consultants or suppliers that are certified disabled veteran business enterprises.
15. Assignment. Service Provider shall not assign benefits or delegate duties under this Agreement in whole or in part, nor assign any moneys due or to become due hereunder without the written consent of Trustees.
16. Successors. The provisions of this Agreement shall extend to and be binding upon and inure to the benefit of the heirs, executors, administrators, successors, and assigns to the parties hereto.

17. Notice. Notice for either party may be served by delivering it in writing to the party or by depositing it in a U.S. mail deposit box with postage fully prepaid addressed as shown within the information block of the Agreement page. Nothing herein shall preclude the giving of notice by personal service.
18. Audit. If the Agreement exceeds \$10,000, the contracting parties shall be subject to the examination and audit of the State Auditor of the State of California and the California State University Auditor for a period of three years after final payment under the Agreement. This examination and audit shall be confined to those matters connected with the performance of this Agreement, including, but not limited to, the cost of administering this Agreement (Government Code Section 8546.7).
19. DIR Registration. In accordance with Labor Code Section 1720, *et seq.*, the Service Provider shall register with the Department of Industrial Relations (DIR) for this project and pay at least the prevailing wages on services/work aspects where a prevailing wage applies. Such services and/or work aspects include, but are not limited to, the Service Provider or its sub-consultant's provision of geotechnical studies, potholing involving digging, site surveying and/or construction IOR services as defined by the DIR.
20. Agreement Changes. Alteration or variation of the terms of this Agreement shall not be valid unless made in writing and signed and dated by the parties. Oral representations, understandings, or writings not expressly incorporated in the Agreement are void. Unless identified within Exhibit A, Scope of Work under a separate sub-heading entitled 'Modifications to Agreement', it is the intent of the Trustees to use the standard published form of this Agreement and Rider A without modification. The Agreement and Rider A shall not be modified without review and concurrence by CSU Office of General Counsel.

End of Rider A

**Rider B – Supplementary General Provisions**  
**California State University [Insert] – Agreement Number [Insert]**  
Campus Task Order Service Agreement for Professional Services

**1.0 GENERAL**

1.1 During the term of this Agreement, the campus may issue individual Task Orders for the provision of professional services for various projects on campus.

1.2 *[Insert additional general scope of work descriptions here]*

*Sample*

*Provide engineering consulting services as requested by Task Order. Services are anticipated to variously include: surveying, civil engineering, structural engineering, construction review, cost estimating and construction administration. All work shall be performed under the respective California registration/license for the discipline involved.*

*Service may on occasion also include participation and representation of the campus at public hearings and meetings with approval agencies, and assisting in the preparation of CSU Capital Outlay Building Change Proposals.*

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**2.0 TASK ORDERS AND FORMS**

**2.1 TASK ORDERS**

The campus may develop a Draft Task Order in consultation with the Service Provider. Once a scope and fee is agreed to, the campus shall present a Task Order to the Service Provider for signature. Service Provider shall return the signed Task Order to the campus in hard hardcopy or .PDF format.

Service Provider shall not commence performance of services prior to receipt (hardcopy or .PDF format) of a fully executed Task Order. Task Orders may be executed as one document or executed by all parties in counterparts.

**2.2 STANDARD FORMS**

Use standard forms and documents provided by the Trustees in providing services under this Agreement including, but not limited to: construction management forms and invoices for services.

**3.0 REVIEWS and APPROVALS to CONSTRUCT**

Coordinate with the Project Administrator and Authorities Having Jurisdiction as needed and secure Construction Document plan check, peer review(s) and outside agency approvals for construction.

**4.0 COMPENSATION**

4.1 The Agreement identifies the maximum cumulative amount that may be authorized. Individual Task Orders may be issued for any amount up to the balance available under this Agreement. Individual Task Orders encumber (lock in) funds for a particular task and reduce by a like amount the balance available for issuance of subsequent Task Orders.

**Rider B – Supplementary General Provisions**  
**California State University [Insert] – Agreement Number [Insert]**  
Campus Task Order Service Agreement for Professional Services

4.2 Each Task Order shall identify a professional fee for services and authorize work either via a lump sum or hourly basis. Invoiced hourly charges shall be in accordance with the Exhibit B Hourly Rate Schedule of this Agreement. Where a specialized service to be provided is not indicated in the Exhibit B Schedule, a supplemental hourly rate sheet may be included and made applicable to the individual Task Order.

4.3 **REIMBURSABLE EXPENSES**

Unless otherwise stated in the Task Order, in addition to the fees for services, the Trustees will reimburse certain project-related expenditures.

Claims for reimbursable expenses shall reflect actual expenditures without a markup made by Service Provider, employees, or consultants working on the project and be documented by appropriate billing and supporting receipts. Unless otherwise stated within an individual Task Order, reimbursable expenses will be paid as follows:

a.) **Reprographic Services:**

Reproduction and delivery of project deliverables provided to the Trustees shall be reimbursable except that reproduction and delivery of documents for internal Service Provider use and coordination is not reimbursable.

b.) **Travel and Mileage:**

Trips from the Service Provider's office to the campus project site or to the Chancellor's Office are not reimbursable unless pre-authorized. Project related travel to be reimbursed must be noticed in advance and authorized. Once authorized, reasonable travel and meal charges incurred for this project will be reimbursed.

c.) **Office Supplies and Telecommunication Charges:**

Charges for miscellaneous office supplies, office operations, and telecommunication charges are not reimbursable.

**5.0 PCC 10720**

Professional services provided under this agreement for construction projects shall be complete and accurate and shall give such direction as will enable any competent builder to carry them out (*Public Contract Code 10720*).

**6.0 OWNERSHIP AND USE OF DOCUMENTS**

6.1 The Service Provider agrees that designs, drawings, specifications, electronic equivalents, and other technical data produced in the performance of this Agreement is the property of the Trustees. Upon Trustee request the Service Provider shall provide electronic and or print copies of this work product to the Trustees. The Trustees grant the Service Provider the right to reuse the design and features developed for this work in other designs for other projects, including those with other clients.

6.2 The Trustees reserve the right to use documents prepared under this Agreement regardless of whether the Agreement is terminated or the project is suspended or abandoned. This right allows the Trustees to use these documents in the future for the same project or for other CSU projects. Trustee reuse of documents in whole or in part on another project relieves the Service Provider of liability resulting from such use.

END OF RIDER B

**Exhibit A - Task Order [Insert number]**  
**California State University [Insert] – Agreement Number [Insert]**  
 Campus Task Order Service Agreement for Professional Services

**[Date]**

[Service Provider]  
 [Address]

This Task Order, when fully executed in counterparts, authorizes you to provide the professional services described below. Services are to be performed in accordance with the Task Order Service Agreement No. <Agreement #> dated <date master agreement signed by CSU general counsel>.

**Project Number**

**Project Name:**

**Project Location:**

**Scope of Work:**

Provide [insert]

**Schedule:**

Start work [insert salient dates]

**Deliverables:**

Provide [insert]

**Compensation:**

Compensation for this Task Order shall be: [lump sum or hourly not to exceed] \$ \_\_\_\_\_  
 Reimbursable charges paid in addition to this amount in accordance with the Master Agreement.

**Approval Signatures:**

*This Task Order may be executed in counterparts, all of which together shall constitute a completely executed Task Order. A copy of a signed Task Order in PDF or facsimile format shall be considered as valid and binding as an original.*

Requested by:

By: \_\_\_\_\_  
 <Signature>

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

\_\_\_\_\_  
 <Printed name and title of authorized signatory>

Accepted by <Service Provider >:

By: \_\_\_\_\_  
 <Signature>

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

\_\_\_\_\_  
 <Printed name and title of authorized signatory>

*I hereby certify upon my own personal knowledge that budgeted funds are available for the period and purpose of the expenditures stated above:*

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

\_\_\_\_\_  
 Accounting/Procurement Officer

SCO Acct Data:	Fund	Sub Fund	Agency	Yr.	Ref/Item	Category	Program	Element	Component	Chapter	Fiscal Yr.	Legal Ref.
	123456	123456	123456		123456	123456	123456	123456	123456	123456	123456	123456
Fund Name	123456			PS Account	PS Fund	PS Dept. ID	PS Program	PS Class	PS Project/Grant			
	123456			123456	123456	123456	123456	123456	123456	123456		