



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: MINGA

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Professional Services**

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source Code (s) ____-____-____-____-____-____ % _____

Funding Category: Base Supplemental Concentration
 Restricted: LCFF/LCAP Other: _____

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: Renewal Contract Amount: 83,520.00

School Site/Department: Ed Services Number of Individuals Served: 12,500

Approved at Site by*: _____ Date: _____

* Signature - **FOR CONTRACTS ORIGINATED BY SCHOOL SITE**

Departmental Approval**: Kelley Cook Dr. Roderick Castro Date: 06/04/2026

** Signature - **DISTRICT OFFICE DEPT. SIGNATURE**

Contract Created by: Kelley Cook Role: Department Administrator

Site/Dept: Purchasing Phone #: 707-890-3800

Proposed Contract Start Date: 07/01/2026 Proposed Contract End Date: 06/30/2027

Requisition #: _____

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____

Attach Signed Vendor Contract: 1 Vendor Contract _____



QUOTE - Santa Rosa City Schools - 26/27 Renewal

Santa Rosa City Schools

211 Ridgway Ave., 211 Ridgway Ave.

Santa Rosa, CA 95401

USA

Reference: 20260313-193250682

Quote created: March 13, 2026

Quote expires: June 30, 2026

Quote created by: Adan Barclay,
adanbarclay@minga.io

Account Executive

LuzElena Perez

leperez@srcs.k12.ca.us

(707) 890-3800 ext. 80335

Roderick Castro

rcastro@srcs.k12.ca.us

(707) 890-3800 ext. 80305

Comments from Adan Barclay

2026/2027 School Year

- Rincon Valley Middle School
- Ridgway High School
- Elsie Allen Jr/Sr High School
- Piner Jr/Sr High School
- Maria Carrillo High School
- Santa Rosa Jr/Sr High School
- Montgomery Jr/Sr High School

Products & Services

Item & Description	SKU	Quantity	Unit Price	Total
<p>Minga Hallpass Bundle- PREMIUM - Up to 750 Students - Rincon Valley Middle School</p> <p>Includes ID, Community, Hall Pass Module, 15k SMS Messages</p> <p>Premium Support (Priority Queue, Direct Phone Access, Guided Implementation, Annual Virtual Teacher Training, Quarterly Reviews & Data Insights, and Strategic Advisory Sessions)</p>	26-BUN-HAL-PRE-750	1	\$3,700.00	\$3,700.00
<p>Minga Full Bundle- PREMIUM - Up to 500 Students - Ridgway High School</p> <p>Includes the following modules: Hall Pass Module, Check In Module, Behavior Module, and 15k SMS Messages</p> <p>Premium Support (Priority Queue, Direct Phone Access, Guided Implementation, Annual Virtual Teacher Training, Quarterly Reviews & Data Insights, and Strategic Advisory Sessions)</p>	26-BUN-FUL-PRE-500	1	\$8,030.00	\$8,030.00
<p>Minga Full Bundle- PREMIUM - Up to 1250 Students - Elsie Allen Jr/Senior High</p> <p>Includes the following modules: Hall Pass Module, Check In Module, Behavior Module, and 15k SMS Messages</p> <p>Premium Support (Priority Queue, Direct Phone Access, Guided Implementation, Annual Virtual Teacher Training, Quarterly Reviews & Data Insights, and Strategic Advisory Sessions)</p>	26-BUN-FUL-PRE-1250	1	\$11,990.00	\$11,990.00
<p>Minga Full Bundle- PREMIUM - Up to 2500 Students - Piner Jr/Senior High</p> <p>Includes the following modules: Hall Pass Module, Check In Module, Behavior Module, and 50k SMS Messages</p> <p>Premium Support (Priority Queue, Direct Phone Access, Guided Implementation, Annual Virtual Teacher Training, Quarterly Reviews & Data Insights, and Strategic Advisory Sessions)</p>	26-BUN-FUL-PRE-2500	1	\$17,270.00	\$17,270.00

Item & Description	SKU	Quantity	Unit Price	Total
Minga Full Bundle- PREMIUM - Up to 2500 Students - Maria Carrillo High School Includes the following modules: Hall Pass Module, Check In Module, Behavior Module, and 50k SMS Messages Premium Support (Priority Queue, Direct Phone Access, Guided Implementation, Annual Virtual Teacher Training, Quarterly Reviews & Data Insights, and Strategic Advisory Sessions)	26-BUN-FUL-PRE-2500	1	\$17,270.00	\$17,270.00
Minga Full Bundle- PREMIUM - Up to 2500 Students - Santa Rosa Jr/Senior High Includes the following modules: Hall Pass Module, Check In Module, Behavior Module, and 50k SMS Messages Premium Support (Priority Queue, Direct Phone Access, Guided Implementation, Annual Virtual Teacher Training, Quarterly Reviews & Data Insights, and Strategic Advisory Sessions)	26-BUN-FUL-PRE-2500	1	\$17,270.00	\$17,270.00
Minga Full Bundle- PREMIUM - Up to 2500 Students - Montgomery Jr/Senior High Includes the following modules: Hall Pass Module, Check In Module, Behavior Module, and 50k SMS Messages Premium Support (Priority Queue, Direct Phone Access, Guided Implementation, Annual Virtual Teacher Training, Quarterly Reviews & Data Insights, and Strategic Advisory Sessions)	26-BUN-FUL-PRE-2500	1	\$17,270.00	\$17,270.00
One-time subtotal				\$92,800.00
2026/2027 District Discount				(\$9,280.00) 10% discount
Total				\$83,520.00

Standard annual subscription July 1 - June 30.

Minga [Privacy Policy](#) and [Acceptable Use Policy](#) and [Subscription Agreement](#)

[Minga W9 Download](#)

[Minga Payment Instructions](#)

Minga Solutions

548 Market St PMB 72165

San Francisco, California 94104-5401

United States



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: Incident IQ, LLS

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Independent Contractor/Business/Organization*

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source (Code): 01 - 0000 - 0 - 0000 - 7700 - 5817 - 389 - 5189 % 100 cd
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

Funding Category: Base Supplemental Concentration
 Restricted: _____ Other: General Funds

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: Renewal Contract Amount: \$50,519.00

School Site/Department: MIST/IT Number of Individuals Served: DO

Approved at Site by*: _____ Date: _____
 * Signature - **FOR CONTRACTS ORIGINATED BY SCHOOL SITE**

Departmental Approval**: Adrian Bica Date: 05/22/2026
 ** Signature - **DISTRICT OFFICE DEPT. SIGNATURE**

Contract Created by: Bea Gonzales Role: Site Secretary
 Site/Dept: MIST/IT Phone #: 707-890-3877

Proposed Contract Start Date: 07/01/2026 Proposed Contract End Date: 06/30/2026

Requisition #: R27-00038

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____ Approval by Superintendent

Attach Signed Vendor Contract: 1 Vendor Contract



Quote Name Updated: Santa Rosa City Schools - CA -- Platform Renewal - 2026 - 2027 (Year 2 of 3)
Company Address 750 Glenwood Ave SE Suite 320
Atlanta, GA 30316
US

Created Date 3/5/2026
Expiration Date 7/31/2026
Quote Number 55339

Bill To Name Santa Rosa City Schools
Bill To 211 Ridgeway Ave.
Santa Rosa, CA 95401
United States

Ship To Name Santa Rosa City Schools
Ship To 211 Ridgeway Ave.
Santa Rosa, CA 95401
United States

Product Code	Product	Product Description	MSRP	Sales Price	Quantity
IIQ-3000	iiQ Platform with Facilities	Incident IQ Platform with iiQ Facilities core product, Subscription	\$30,479.04	\$29,717.06	1.00
IIQ-6100	iiQ Ticketing	Incident IQ Ticketing product (add-on), Subscription	\$21,335.32	\$20,801.94	1.00

Total Price \$50,519.00

Notes

Pricing Pursuant to TIPS contract #220105



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: CDW-G

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Independent Contractor/Business/Organization*

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source (Code): 01 - 0000 - 0 - 0000 - 7700 - 5817 - 389 - 5189 % 100 cd
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

Funding Category: Base Supplemental Concentration
 Restricted: _____ Other: General Funds

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: Renewal Contract Amount: \$70,274.14

School Site/Department: MIST/IT Number of Individuals Served: 13600

Approved at Site by*: _____ Date: _____
 * Signature - **FOR CONTRACTS ORIGINATED BY SCHOOL SITE**

Departmental Approval**: Adrian Bica Date: 05/22/2026
 ** Signature - **DISTRICT OFFICE DEPT. SIGNATURE**

Contract Created by: Bea Gonzales Role: Department Secretary
 Site/Dept: MIST/IT Phone #: 707-890-3877

Proposed Contract Start Date: 08/02/2026 Proposed Contract End Date: 08/01/2027

Requisition #: R27-00039

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____ Approval by Superintendent

Attach Signed Vendor Contract: 1 Vendor Contract



CDW Education
 75 Remittance Drive, Suite 1515
 Chicago, IL 60675

Prepared For
 Santa Rosa City Schools
 211
 Ridgway Avenue
 Santa Rosa, CA 95401

Estimate Date
 04/17/2026

Estimate Number
 0128283

Description	Rate	Qty	Line Total
GOO-WEI-1002 GWFE Plus - 3 Year - 10K+ - Google Workspace for Education Plus - 3 Year - 10k+ - Students: Google Workspace for Education Plus - 3 Year Available for new customers purchasing on or after October 1st, 2025, and for renewals after February 1st, 2026. Licensed Domains: srcs.k12.ca.us License Term: 2026-08-02 - 2027-08-01	\$4.63	13600	\$62,968.00
GOO-WEI-1000 GWFE Plus - 3 Year - 10K+ - Google Workspace for Education Plus - 3 Year - 10k+ - Staff: Google Workspace for Education Plus - 3 Year Available for new customers purchasing on or after October 1st, 2025, and for renewals after February 1st, 2026. Licensed Domains: srcs.k12.ca.us License Term: 2026-08-02 - 2027-08-01	\$4.63	1578	\$7,306.14
		Subtotal	70,274.14
		Tax	0.00
		Estimate Total (USD)	\$70,274.14

Notes

A Student Enrollment Verification Letter OR License Verification Letter is required for all first time AND annual renewals of EDU Workspace Standard and Workspace Plus orders that are changing license count. These letters verify that the number of student licenses purchased is equal to, or greater than, your current total student enrollment (representing all students, including full and part time). License Verification Letters must additionally include total staff requiring an active Education Fundamentals license.

CITE - 400-23-CITE

Terms

About Us <https://www.cdwg.com/content/cdwg/en/about/overview.html>

Privacy Policy <https://www.cdwg.com/content/cdwg/en/terms-conditions/privacy-notice.html>

Terms and Conditions <https://www.cdwg.com/content/cdwg/en/terms-conditions.html>

Please send purchase orders to cdwg@amplifiedit.com or fax to 757-585-3550. If possible, please also include a copy of your organization's tax-exempt certificate with your purchase order. An exemption certificate is required to process Google Voice orders.

This email was sent by CDW Government LLC. All information and offers are subject to the CDW•G Terms and Conditions, and CDW•G policies.

CDW®, CDW•G® and PEOPLE WHO GET IT® are registered trademarks of CDW LLC. All other trademarks and registered trademarks are the sole property of their respective owners.



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: Classlink Inc

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Independent Contractor/Business/Organization*

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source (Code): 01 - 0000 - 0 - 0000 - 7700 - 5817 - 389 - 5189 % 100 cd
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

Funding Category: Base Supplemental Concentration
 Restricted: _____ Other: General Funds

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: Renewal Contract Amount: \$50,170.20

School Site/Department: MIST/IT Number of Individuals Served: 14794

Approved at Site by*: _____ Date: _____
 * Signature - **FOR CONTRACTS ORIGINATED BY SCHOOL SITE**

Departmental Approval**: Adrian Bica Date: 05/22/2026
 ** Signature - **DISTRICT OFFICE DEPT. SIGNATURE**

Contract Created by: Beatrice Gonzales Role: Department Secretary
 Site/Dept: MIST/IT Phone #: 707-890-3877

Proposed Contract Start Date: 09/01/2026 Proposed Contract End Date: 08/31/2027

Requisition #: R27-00020

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____ Approval by Superintendent

Attach Signed Vendor Contract: 1 Vendor Contract



Quote

Contact Name Adrian Bica
 Account Name Santa Rosa City SD (CA, 95401)
 Bill To 211 Ridgway Avenue
 Santa Rosa, CA 95401
 United States

Quote Number 00032064
 Created Date 4/29/2026
 Prepared By Justine White
 Email justine.white@classlink.com
 Expiration Date 9/1/2026
 Subscription Term 9/1/2026 - 8/31/2027
 Grand Total \$50,170.20

Please note that the ClassLink user count is the combined total of students and full-time teachers.

Product Code	Product	Sales Price	Quantity	Total Price
CL-USER-LP-4	ClassLink Annual License - per user (15,001-25,000 users)	\$3.30	14,794.00	\$48,820.20
CL-HOST-OR3	ClassLink Roster Server Annual Hosting (10,001-100,000 users)	\$1,350.00	1.00	\$1,350.00

Total Price \$50,170.20

Proposal supersedes all other proposals. Email purchase order to billing@classlink.com
 Remittance Address: ClassLink Inc. P.O.Box 51100 Newark, NJ, 07101

Providing excellent products and services at great cost value to our customers continues to be a key goal at ClassLink. Due to increased costs and our intent to continue to provide quality services, pricing changes have become necessary. The quote above includes the price changes, which are effective 01/01/2025.



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: Imagine Learning

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Independent Contractor/Business/Organization*

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source (Code): 01 - 0500 - 0 - 1140 - 1000 - 5817 - 249 - L101 % 100 cd
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

Funding Category: Base Supplemental Concentration
 Restricted: _____ Other: Secondary District LCAP

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: Renewal Contract Amount: 22,575.00

School Site/Department: Ed Services Number of Individuals Served: 250

Approved at Site by*: _____ Date: _____

* Signature - FOR CONTRACTS ORIGINATED BY SCHOOL SITE

Departmental Approval**: Aaron Gildengorin Date: 05/26/2026 05/26/2026

** Signature - DISTRICT OFFICE DEPT. SIGNATURE

Contract Created by: Aaron Gildengorin Role: Department Administrator

Site/Dept: Ed Services Phone #: 707-890-3800

Proposed Contract Start Date: 08/01/2026 Proposed Contract End Date: 07/30/2027

Requisition #: _____

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____ Approval by Superintendent

Attach Signed Vendor Contract: 2 Vendor Contract



Price Quote

100 S. Mill Ave
Suite 1700
Tempe, AZ 85281
877-725-4257

Date 3/12/2026
Quote No. Q-237428
Acct. No. 12214874
Total 22,575.00
Pricing Expires 09/08/2026

Purchasing
211 Ridgway Ave
Santa Rosa CA 95401
United States

Licenses for students in ISP

Payment Term	Contract Start	Contract End
Net 30	8/1/2026	7/30/2027

Site	Description	End Date	Qty
Santa Rosa City Schools	Edgenuity Academic Integrity	07/30/2027	2
	PL - CW/Supp/SS Virtual Session	07/30/2027	2
Ridgeway High School	Imagine EdgeEX with Edgenuity 6-12 Comprehensive Site License	07/30/2027	1

Subtotal 22,575.00
Tax Total 0.00
Total 22,575.00

Imagine Learning will audit enrollment count throughout the year. If more enrollments are found to be in use than purchased, Imagine Learning will invoice the customer for the additional usage.

This quote is subject to Imagine Learning LLC Terms and Conditions of Company Services ("Terms and Conditions"). These Terms and Conditions are available at www.imaginelearning.com/standard-terms-and-conditions, may change without notice and are incorporated by this reference. By signing this quote or by submitting a purchase order or form purchasing document, Customer explicitly agrees to these Terms and Conditions resulting in a legally binding agreement. To the fullest extent permitted under applicable law, all pricing information contained in this quote is confidential and may not be shared with third parties without Imagine Learning's written consent.

Please note that the paper used in our products and the paper and components included in our science and math kits are sourced from suppliers that may become subject to tariffs. While we are actively managing our supply chain to minimize the effect of any tariffs that may be imposed, we reserve the right to apply a tariff surcharge to offset increased costs if necessary. We will provide thirty (30) days advance notice regarding the imposition of any such surcharges.

Not valid unless accompanied by a purchase order. Please specify a shipping address if applicable. Please e-mail this quote, the purchase order and order documentation to AR@imaginelearning.com or fax to 480-423-0213.

Purchasing

Signature: _____
Print Name: _____
Title: _____
Date: _____

Imagine Learning Representative

Liz Peatman
Account Executive -
liz.peatman@imaginelearning.com
imaginelearning.com



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: King Consulting

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Professional Services**

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source (Code):	<u>40</u>	-	<u>9040</u>	-	<u>0</u>	-	<u>9660</u>	-	<u>8500</u>	-	<u>5800</u>	-	<u>393</u>	-	<u>5192</u>	%	<u>100</u>	_____
	_____	-	_____	-	_____	-	_____	-	_____	-	_____	-	_____	-	_____	%	_____	_____
	_____	-	_____	-	_____	-	_____	-	_____	-	_____	-	_____	-	_____	%	_____	_____
	_____	-	_____	-	_____	-	_____	-	_____	-	_____	-	_____	-	_____	%	_____	_____

Funding Category: Base Supplemental Concentration
 Restricted: Special Reserve Fund-Capital Other: _____

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: Renewal Contract Amount: 180,000.00

School Site/Department: Business/Fiscal Services Number of Individuals Served: Dist. Wide

Approved at Site by*: _____ Date: _____
* Signature - **FOR CONTRACTS ORIGINATED BY SCHOOL SITE**

Departmental Approval**: Erik Oden Date: 6/4/26
** Signature - **DISTRICT OFFICE DEPT. SIGNATURE**

Contract Created by: Lizbeth Angeles Hernandez Role: Department Secretary
Site/Dept: Business/Fiscal Services Phone #: 707-890-3800

Proposed Contract Start Date: 07/01/2026 Proposed Contract End Date: 06/30/2027

Requisition #: _____

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____

Attach Signed Vendor Contract: 1 Vendor Contract _____





April 2026
Lisa August
Interim Superintendent
Santa Rosa City Schools District

RE: King Consulting, July 1, 2026, Rate Increase

Dear Lisa August,

It has been nearly three years since our last adjustment, and during that time we've absorbed increases in operating costs and fees in order to keep our work with you consistent and uninterrupted.

Beginning **July 1 (26-27 Fiscal Year)**, our hourly rate will shift from **\$205 to \$225**. We've held off on making any changes for as long as possible, and this small adjustment will help us continue delivering the level of service and responsiveness you expect from our team.

As always, we're grateful for the partnership and here to answer any questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'Jamie', with a long horizontal flourish extending to the right. The signature is positioned over a light-colored rectangular background.

Jamie Iseman
President, King Consulting



KING

Proposal:

Professional Consulting Services

Prepared for:

Santa Rosa City Schools District

Attention:

Lisa August

Interim Superintendent

laugust@srcs.k12.ca.us

707-890-3800 Ext. 80101

Primary Contact:

Jamie King-Iseman

President

jamie@kinginc.com

916-706-3538



KING

916-706-3538 · info@kinginc.com · kinginc.com

Experience and Qualifications

King Consulting is an established and recognized school facility planning firm. We offer a wide array of services to assist school districts of all sizes across California and the nation with their school planning needs and funding opportunities.

Our work includes the completion of long-range master plans, boundary studies, demographic studies, enrollment projection studies, developer fee justification studies (both Level I and Level II), developer mitigation, and State/Local/Federal eligibility and funding applications. For the past 27 years, King Consulting has worked with clients throughout California and the nation.

Our professional, enthusiastic staff has over 107 years of combined experience. We are a small firm, with only highly experienced staff who excel in their specific areas of expertise. Our combined experience has resulted in our firm's ability to adhere to timelines and organize projects so that the client's needs are exceedingly met. While we specialize in managing and summarizing complex data analyses, we pride ourselves on our unique ability to disseminate the information to our clients and their stakeholders. We are always excited for the opportunity to meet in person or over the phone to clearly explain anything

needed to our clients' staff, school board, and community. Our clients receive information within a broader context that includes full narrative explanations that school district staff and school board members repeatedly reference throughout the year.

While we excel in all areas of school facility planning, we are most proud of the lasting relationships we form with our clients. We care about our school districts, and we get to know them intimately through the course of our work. For this reason, so many of our clients work with us year after year. King Consulting digs deeper and tries harder in every aspect of our work because we become personally invested in the districts with whom we work.

Thank you for the opportunity to submit this proposal.

Scope of Services

This document represents an agreement between the District and King Consulting. For the compensation stipulated, King Consulting shall provide the following services:

STATE SCHOOL FACILITY PROGRAM FUNDING ELIGIBILITY

Review, prepare, and submit documentation required to maximize the District's New Construction and Modernization eligibility under the State School Facility Program.

- Obtain from the District and State facilities enrollment information required to determine the amount of State Modernization and New Construction grant funding eligibility under the State School Facility Program:
 - Review and compile current CalPADS enrollment data;
 - Review and compile facility database for each District site, including square footage by building, original date of construction, or State Phase C date of construction for facilities modernized under the former Lease Purchase Program;
 - Prepare State Enrollment projections using all available methodologies to ensure maximum eligibility is captured:
 - 5-Year Projection;
 - 10-Year Projection;
 - Modified and Alternative Weighting Mechanisms;
 - Birth Rate Adjustment (by County and Zip Code);
 - Dwelling Unit Research and Augmentation;
 - Student Yield Factor Review;
- Review site diagrams for square footage, classroom counts, and age of facilities. Prepare and update facility capacity database annually to include any new additional facilities;
- Prepare required enrollment and facilities reports for District review and approval to file with the Office of Public School Construction to seek approval of Modernization and New Construction eligibility. Prepare annual updated enrollment and facilities reports as needed or required;
- Secure State Allocation Board approval of District's eligibility.

Continued on next page

STATE SCHOOL FACILITY PROGRAM FUNDING APPLICATION SERVICES

Strategic Funding Plan

Review historical, current, and future District capital facility projects to identify State funding opportunities and develop a Strategic Funding Plan to maximize the District's local funding. Programs include, but are not limited to:

- Modernization
- New Construction
- Career Technical Education Facilities Program
- Facility Hardship
- Financial Hardship
- Seismic Mitigation
- Minimum Essential Facilities
- Charter School Facility Program
- Preschools, Kitchens, and Health Facilities
- Lead in Water Remediation

Assist with Preparation of State Funding Applications

Assist the District with all applications for State approval and funding. These services may include, but are not limited to:

- California Department of Education (CDE) plan approval requests;
- Division of State Architect (DSA) plan approval requests;
- DSA exemption verification;
- Office of Public School Construction (OPSC) Funding Applications (Form 50-04);
- OPSC Fund Releases (Form 50-05);
- OPSC Expenditure Reports (Form 50-06);
- Assistance with potential appeals to the State Allocation Board;
- Preparation of narrative grant applications for CTEFP projects.

Assist with Audit and Expenditure Reporting

Assist the district with the audit process and all expenditure for State funding received under the SFP. These services may include, but are not limited to:

- Provide grant certification requirements checklist to ensure the District is adhering to SFP regulations for all State-funded projects;
- Collect and maintain all documentation that will be required at audit;
- Following approval and funding of project, prepare Detailed List of Project Expenditures, Annual Expenditure Reports, Substantial Progress Reports, etc.;
- Continue to provide support until such time the local auditor and State Controller's Office has certified and closed the project.

Consulting Fees

For the services outlined, the District shall pay King Consulting at the **hourly rate of \$225, not to exceed \$180,000 (800 hours)**. King Consulting will bill the District in increments of 15 minutes, and invoice on a monthly basis. The scope of work necessary to complete the services listed in this Agreement is dependent upon the availability and quality of the District's enrollment and facilities information.

The fees shall cover all normal business expenses incurred on behalf of the District. Necessary visitations to the District by King Consulting will be reimbursed on an actual and necessary basis. Reimbursed visitations shall have prior approval by the District.

The District shall be responsible for reviewing and verifying all data included in documents, forms, and reports prepared by King Consulting on behalf of the District. The District shall be responsible for consulting legal counsel as related to the preparation and submittal of documents, forms, and reports.

The terms of this agreement shall remain in force unless mutually amended.

ADDITIONAL CONSIDERATIONS

King Consulting shall be reimbursed as follows:

- Work Completed above and beyond the hours specified in this contract shall be billed at **\$225.00 per hour**;
- Mileage for all meetings shall be reimbursed to King Consulting at the IRS standard mileage rate;
- Application filing fees and other State-required fees are the responsibility of the District;
- Express Mail expenses will be documented and reimbursed to King Consulting;
- Reproduction of documents shall be the responsibility of the District. King Consulting will provide duplicating costs at an actual cost basis.

VALIDITY PERIOD

The quoted price and services outlined in this contract are valid for a period of 60 days from the date of issuance. Any acceptance of this proposal beyond the specified validity period may result in a reevaluation of the pricing and services offered. Both parties acknowledge and agree that any changes to the scope of work, market conditions, or other relevant factors may necessitate adjustments to the terms outlined herein after the expiration of the 60-day validity period.

Signatures

This Agreement is between the Santa Rosa City Schools District and King Consulting.



Lisa August
Interim Superintendent
Santa Rosa City Schools District

Jamie King-Iseman
President
King Consulting

Date

04/17/2026

Date



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: Keystone Therapy and Training Services, Inc

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Professional Services**

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source (Code): 01 - 9228 - 0 - 1770 - 3110 - 58000 - 296 - 000 % 100

_____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

_____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

_____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

Funding Category: Base Supplemental Concentration

Restricted: _____ Other: Grant Funded

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: New Contract Amount: \$25,000.00

School Site/Department: Wellness and Engagement Number of Individuals Served: 400

Approved at Site by*: _____ Date: _____

* Signature - **FOR CONTRACTS ORIGINATED BY SCHOOL SITE**

Departmental Approval**: Eric Lofchie Date: 05/22/2026

** Signature - **DISTRICT OFFICE DEPT. SIGNATURE**

Contract Created by: Eric Lofchie Role: Department Administrator

Site/Dept: Wellness and Engagement Phone #: 707-729-1865

Proposed Contract Start Date: 07/01/2026 Proposed Contract End Date: 06/30/2027

Requisition #: _____

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____

Attach Signed Vendor Contract: 1 Vendor Contract

**SANTA ROSA CITY SCHOOLS
SERVICE CONTRACT**

This CONTRACT is hereby entered into between the Governing Board of the Santa Rosa City Schools, hereinafter referred to as “DISTRICT”, OR “BOARD” and Keystone Therapy & Training Services, hereinafter referred to as “CONTRACTOR”.

- Services.

(a) DISTRICT’s Responsibilities and Duties:

Access and Coordination:

Facilitate on-site access to school campuses during regular school hours including keys when necessary. Provide dedicated, confidential space for sessions that meets privacy requirements. Coordinate referral process and identification of students with insurance coverage. Maintain coordination between Keystone providers and district wellness staff. Provide SRCS email, Aeries Access and Tad Health.

Administrative Support:

Work with contractor to distribute and collect consent forms for insurance billing. Facilitate communication between Keystone staff and school administrators. Provide access to necessary student information systems with appropriate safeguards. Support family outreach and communication in English and Spanish.

Compliance and Oversight:

Ensure this CONTRACT and services provided thereto comply with Education Code requirements for school-based services. Monitor quality of services through established feedback mechanisms. Maintain ultimate responsibility for student safety and educational environment. Reserve right to review service delivery concerns and request corrective action.

Shared Responsibilities:

Develop and maintain clear referral protocols and communication systems. Coordinate crisis response procedures and emergency protocols. Participate in periodic review meetings (quarterly recommended). Ensure smooth transitions for students between CYBHI and district-provided services as needed. Protect student confidentiality while maintaining appropriate information sharing with proper consent. Collaborate on continuous improvement of school-based behavioral health services.

See Attachment A for supplemental FERPA, background clearance, and campus scope provisions incorporated herein.

(b) CONTRACTOR’s Responsibilities and Duties:

Service Delivery:

Provide behavioral health services, as outlined in the CYBHI Fee Schedule, to students with Medi-Cal or private insurance coverage at secondary campuses (grades 7-12). Deliver evidence-based behavioral health services in accordance with CYBHI standards. Maintain appropriate provider-to-student ratios and service frequency as indicated. Provide services in English and Spanish as needed to meet student and family needs.

Billing and Compliance:

Collaborate with district to collect and record insurance information. Submit all billing directly to Carelon under the CYBHI Fee Schedule. Maintain compliance with all CYBHI, CalAIM, and applicable insurance billing requirements. Ensure all providers meet credentialing requirements for CYBHI provider enrollment. Maintain all required licensure, liability insurance, and professional credentials.

Documentation and Reporting:

Maintain confidential client records in compliance with HIPAA and FERPA. Provide quarterly service utilization reports to DISTRICT (aggregate data only). Coordinate treatment planning with district staff as appropriate and with proper consent. Participate in required data sharing for district reporting purposes (de-identified). Ensure that student insurance information is entered into Aeries in a timely manner.

Family Engagement:

For students under 12: Obtain parental/guardian consent for insurance billing and services. Communicate directly with families regarding treatment plans, progress, and scheduling. Provide families with information about their rights under insurance-based services.

For students 12 and over: For students aged 12 and older who independently consent to outpatient mental health services under California minor consent laws, CONTRACTOR will first obtain consent directly from the student prior to requesting insurance information from a parent/guardian for purposes of insurance billing and service coordination. In accordance with best practices CONTRACTOR will continue to work collaboratively with students, parents and guardians as care development evolves with the goal of involving them in the student's care. In accordance with California law, CONTRACTOR's clinicians will consult with the student regarding parent/guardian involvement and will determine whether communication with a parent/guardian is appropriate based on the student's clinical needs, safety considerations, and applicable confidentiality requirements. When appropriate and permitted by law, CONTRACTOR may communicate with families regarding scheduling, insurance billing, treatment planning, and care coordination. Families will also be provided with information regarding their rights and responsibilities related to insurance-based behavioral health services.

See Attachment A for supplemental provisions regarding FERPA school officials designation, referral-level information sharing, background clearances, health and safety termination, campus scope, and CYBHI program requirements incorporated herein.

2. Term. CONTRACTOR shall commence providing services under this CONTRACT on July 1, 2026, and will continue through June 30, 2027, subject to revision and renewal with BOARD approval in subsequent years. Pursuant to Education Code §17596, in no event shall this CONTRACT exceed a term of five (5) years.

3. Compensation. DISTRICT agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this CONTRACT a total fee not to exceed \$25,000. DISTRICT shall pay CONTRACTOR according to the following terms and conditions:

CYBHI Fee Schedule services billed directly to Medi-Cal or private insurance are provided at no cost to DISTRICT. For district-funded services rendered on behalf of students ineligible for insurance-based billing, DISTRICT agrees to pay CONTRACTOR a total fee not to exceed **TWENTY FIVE THOUSAND** Dollars (\$25,000), billed at a rate of \$165.00 per hour of direct service, as further described in the District-Funded Services section of this CONTRACT.

4. Expected Outcomes (Deliverables). DISTRICT expects the following outcomes from the services performed by CONTRACTOR pursuant to this CONTRACT (What was the positive impact on the students? How will/is it measured?):

Services provided under the CYBHI Fee Schedule aim to improve student access to school-linked behavioral health support and promote positive social-emotional functioning at secondary campuses (grades 7-12).

Positive Impact on Students:

Increased access to culturally responsive, developmentally appropriate behavioral health services delivered in a school-linked setting. Improved social-emotional regulation, coping skills, and behavioral functioning. Reduction in behavioral health symptoms that interfere with learning and school engagement. Increased student ability to remain engaged in the educational environment. Strengthened coordination between school staff, families, and behavioral health providers.

Measurement of Outcomes:

Service delivery data including number of students served, frequency of sessions, and timeliness of services in accordance with the CYBHI Fee Schedule. Use of appropriate screening tools, progress monitoring measures, and treatment goals documented in student records. Provider documentation reflecting student progress toward identified behavioral health goals. Attendance and participation data when available and appropriate. Feedback from students, families, and school personnel regarding perceived benefit of services.

Outcomes will be monitored on an ongoing basis and adjusted as appropriate to meet individual student needs while maintaining compliance with CYBHI program requirements.

5. Expenses. Except as set forth herein, DISTRICT shall not be liable to CONTRACTOR for any costs or expenses paid or incurred by CONTRACTOR in performing services for DISTRICT.

6. Independent Contractor. CONTRACTOR, in the performance of this CONTRACT, shall be and act as an independent contractor. CONTRACTOR understands and agrees that he/she and all of his/her employees shall not be considered officers, employees or agents of the DISTRICT, and are not entitled to benefits of any kind or nature normally provided employees of the DISTRICT and/or to which DISTRICT'S

employees are normally entitled, including, but not limited to, State Unemployment Compensation, Workers' Compensation, Health and Welfare Benefits, Paid Vacation, Retirement Program Participation, or any other employee benefits. CONTRACTOR assumes the full responsibility for the acts and/or omissions of his/her employees or agents as they relate to the services to be provided under this CONTRACT. CONTRACTOR shall assume full responsibility for payment of all federal, state, and local taxes or contributions, including unemployment insurance, social security, and income taxes with respect to CONTRACTOR and CONTRACTOR'S employees.

7. Materials. CONTRACTOR shall furnish, at his/her own expense, all labor, materials, equipment, supplies and other items necessary to complete the services to be provided pursuant to this CONTRACT. CONTRACTOR'S services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of his/her profession.

8. Taxes. Federal Internal Revenue Service's regulations require that school districts report all payments to individuals for CONTRACTOR services. CONTRACTOR agrees to file federal and state tax returns and pay all applicable state and federal taxes on amounts paid pursuant to this CONTRACT. In the event DISTRICT is audited for compliance regarding any applicable taxes, CONTRACTOR agrees to furnish DISTRICT with proof of payment of taxes on these earnings.

9. Indemnification:

- (a) CONTRACTOR shall indemnify, defend with counsel acceptable to DISTRICT, and hold harmless to the full extent permitted by law, DISTRICT and its Board of Trustees, officers, agents, employees and volunteers from and against any and all liability, loss, damage, claims, expenses and costs (including, without limitation, attorney fees and costs and fees of litigation) (collectively, "Liability") of every nature arising out of or in connection with CONTRACTOR'S performance or failure to perform its obligations under this CONTRACT, except such Liability caused by the active negligence, sole negligence or willful misconduct of the DISTRICT. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable to or for CONTRACTOR or its agents under workers' compensation acts, disability benefit acts, or other employee benefit acts. Notwithstanding the foregoing, however, in the event that a court determines that liability with respect to any Liability was caused or contributed to by the negligent act, error, omission or the willful misconduct of DISTRICT, liability will be apportioned between CONTRACTOR and DISTRICT with regard to such Liability based upon the parties' respective degrees of culpability, as determined by the court, and CONTRACTOR's duty to indemnify DISTRICT with respect to satisfaction of the judgment only (but not to costs of defense previously incurred by CONTRACTOR) will be limited accordingly.
- (b) CONTRACTOR shall be liable to DISTRICT for any loss or damage to DISTRICT property arising from or in connection with CONTRACTOR'S performance hereunder, if and to the extent caused by CONTRACTOR or any agent or representative of CONTRACTOR.

10. Insurance: With respect to the performance of work under this CONTRACT, CONTRACTOR shall maintain and shall require all of its subcontractors, if any, to maintain insurance as indicated below:

- (a) Worker's compensation insurance with statutory limits as required by the Labor Code or the State of California. The policy shall be endorsed with the following specific language: "This policy shall

not be canceled or materially changed without first giving thirty (30) days prior written notice to the DISTRICT”.

(b) Commercial or Comprehensive General Liability insurance covering bodily injury and property damage using an occurrence policy form, in an amount no less than \$1,000,000 per occurrence, \$2,000,000 aggregate. Such insurance shall include, but not be limited to premises and operations liability, independent CONTRACTOR’s liability, and personal injury liability.

(c) Automobile liability insurance covering bodily injury and property damage in an amount no less than \$1,000,000 combined single limit for each occurrence. Such insurance shall include coverage for owned, hired, and non-owned vehicles.

(d) Each such comprehensive or commercial general liability and automobile liability insurance policy shall be endorsed with the following specific language:

(1) DISTRICT, its officers and employees, is named as additional insured for all liability arising out of the operations by or on behalf of the named insured in the performance of this CONTRACT.

(2) The inclusion of more than one insured shall not operate to impair the rights of one insured against another insured, and the coverage afforded shall apply as though separate policies had been issued to each insured, but the inclusion of more than one insured shall not operate to increase the limits of the company's liability.

(3) The insurance provided herein is primary coverage to DISTRICT with respect to any insurance or self-insurance programs maintained by DISTRICT and no insurance held or owned by DISTRICT shall be called upon to contribute to a loss.

(4) This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to DISTRICT.

(e) Sexual Abuse and Molestation coverage in an amount no less than \$1,000,000 per occurrence, with an annual aggregate of \$2,000,000, endorsed with the following specific language: “This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to DISTRICT.” **[Required if Contractor will be directly supervising children]**

(f) Professional Liability (Errors and Omissions) Insurance for all activities of the CONTRACTOR arising out of or in connection with this CONTRACT is an amount no less than \$1,000,000 combined single limit for each occurrence endorsed with the following specific language: “This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to DISTRICT.” **[Required if Professional Services is checked on first page]**

(g) Documentation: The following documentation shall be submitted to the DISTRICT:

(1) Properly executed certificates of insurance clearly evidencing all coverages, limits, and endorsements required above. The certificates shall be submitted prior to commencement of services under this CONTRACT.

(2) Signed copies of the specified endorsements for each policy. Said endorsement copies shall be submitted within thirty (30) days of execution of this CONTRACT.

(3) Upon DISTRICT'S written request, certified copies of insurance policies. Such policy copies shall be submitted within thirty (30) days of DISTRICT'S request.

(h) Policy Obligations: CONTRACTOR'S indemnity and other obligations shall not be limited by the foregoing insurance requirements.

(i) Material Breach: If CONTRACTOR, for any reason, fails to maintain insurance coverage, which is required pursuant to this CONTRACT; the same shall be deemed a material breach of contract. DISTRICT, at its sole option, may terminate this CONTRACT and obtain damages from the CONTRACTOR resulting from the breach. Alternatively, DISTRICT may purchase such required insurance coverage, and without further notice to CONTRACTOR, County may deduct from sums due to CONTRACTOR any premium costs advanced by DISTRICT for such insurance. These remedies shall be in addition to any other remedies available to DISTRICT.

11. Termination:

(a) DISTRICT may terminate this CONTRACT without cause by giving thirty (30) calendar days written notice to CONTRACTOR. In the event DISTRICT elects to terminate the CONTRACT without cause, it shall pay CONTRACTOR for services satisfactorily rendered to such date.

(b) If either party fails to perform any of its obligations hereunder, within the time and in the manner hereunder provided or otherwise violates any of the terms of the CONTRACT, either party may immediately terminate this CONTRACT by giving written notice of such termination, stating the reason for such termination. In such event, CONTRACTOR shall be entitled to receive payment for all services satisfactorily rendered, provided, however, that there shall be deducted from such amount the amount of liquidated damages, if any, sustained by DISTRICT by virtue of any breach of the CONTRACT by CONTRACTOR.

12. Fingerprints. The DISTRICT has considered the totality of the services to be provided under this CONTRACT and has determined that CONTRACTOR and CONTRACTOR'S employees are subject to the fingerprinting requirements of Education Code section 45125.1. CONTRACTOR shall submit fingerprints for review by the Department of Justice and authorize DISTRICT to receive subsequent arrest and conviction notifications.

13. Confidentiality. CONTRACTOR acknowledges the protections afforded to student health and related information under regulations adopted pursuant to the Health Insurance Portability and Accountability Act of 1996 (HIPAA), student records under the Family Educational Rights and privacy Act (FERPA), and under provisions of state law and DISTRICT policy relating to privacy. CONTRACTOR shall ensure that all activities undertaken pursuant to this CONTRACT comply with these requirements.

14. Ownership of Work Product: DISTRICT shall be the owner of and shall be entitled to immediate possession of accurate reproducible copies of any work product gathered or computed by CONTRACTOR prior to termination of this CONTRACT by DISTRICT or upon completion of the work pursuant to this CONTRACT.

15. Assignment. The obligations of the CONTRACTOR pursuant to this CONTRACT shall be performed solely by CONTRACTOR and shall not be assigned or transferred by the CONTRACTOR to any third party or employee/agent of CONTRACTOR without the DISTRICT'S prior written consent.

16. Compliance with Applicable Laws. The services completed herein must meet the approval of the DISTRICT and shall be subject to the DISTRICT'S general right of inspection to secure the satisfactory

completion thereof. CONTRACTOR agrees to comply with all federal, state, and local laws, rules, regulations, and ordinances that are now or may in the future become applicable to CONTRACTOR, CONTRACTOR'S business, equipment, and personnel engaged in operations covered by this CONTRACT or accruing out of the performance of such operations.

17. Permits/Licenses. CONTRACTOR shall secure and maintain in force such permits and licenses as are required by law in connection with the furnishing of services pursuant to this CONTRACT.

18. Entire CONTRACT/Amendment. This CONTRACT and any attachments constitute the entire CONTRACT among the parties to it and supersede any prior or contemporaneous understanding or CONTRACT with respect to the services contemplated, and may be amended only by a written amendment executed by both parties. Should the CONTRACT terms conflict with any amendments attached hereto, this CONTRACT shall govern.

19. Notice. All notices or demands to be given under this CONTRACT by either to the other shall be in writing and given either by (a) personal service or (b) by postage prepaid U.S. Mail, registered or certified, return receipt requested. Service of notice or demand shall be considered given when received if personally served or, if mailed, on the second day after deposited at any U.S. Post Office. The address to which either party may give notices or demands may be changed by written notice given in accordance with the notice provisions of this section. At the date of this CONTRACT, the addresses of the parties are as follows:

DISTRICT:

Santa Rosa City Schools

211 Ridgway Ave

Santa Rosa, CA 95401

707-890-3800

kcook@srcs.k12.ca.us

CONTRACTOR:

Name: Keystone Therapy and Training Services, Inc

Street: 4415 Sonoma Hwy, Suite A

City/State/Zip: Santa Rosa, CA, 95409

Phone: 707-327-0909

Email: keystone@keystone.love

20. Nondiscrimination. CONTRACTOR shall comply with all applicable federal, state, and local laws, rules and regulations in regard to nondiscrimination in employment because of race, color, ancestry, national origin, religion, sex, marital status, age, medical condition, handicap, or other prohibited basis. All nondiscrimination rules or regulations required by law to be included in this CONTRACT are incorporated by this reference.

21. Extra (Changed) Work. Only the Superintendent may authorize extra (and/or changed) work, which shall be in writing and thereafter ratified by the Board. The parties expressly recognize that DISTRICT and DISTRICT personnel are without authorization either to order extra (and/or changed) work or to waive contract requirements. Failure of the CONTRACTOR to secure proper authorization for extra work shall constitute a waiver of any and all right to adjustment in the contract price or contract time due to such unauthorized extra work and the CONTRACTOR thereafter shall be entitled to no compensation whatsoever for the performance of such work.

22. Conflict of Interest. CONTRACTOR represents that it presently has no interest, which would conflict in any manner or degree with the performance of services contemplated by this CONTRACT. CONTRACTOR further represents that in the performance of this CONTRACT, no person having such interest will be employed. If CONTRACTOR participates in the planning, development, or negotiation of a contract for the District, CONTRACTOR may not subsequently acquire a financial interest in that contract in violation of Government Code section 1090.

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

24. Governing Law. The terms and conditions of this CONTRACT shall be governed by the laws of the State of California with venue in Sonoma County, California, and no other place.

THIS CONTRACT IS ENTERED INTO THIS 10th day of June 2026.

DISTRICT

AUTHORIZED SIGNER *or* CONTRACTOR

Signature: _____

Signature: _____

Lisa August Hulme

Print Name: Erica Bosque

Interim Superintendent

Title: CEO/Executive Director

ysantanaperalta@srcs.k12.ca.us

Email: ericab@keystone.love

707-890-3800 x80201

Phone: 707-327-0909

SRCS Board Approved: _____

ATTACHMENT A — SUPPLEMENTAL PROVISIONS

Santa Rosa City Schools Service Contract
Keystone Therapy & Training Services Inc.
July 1, 2026 – June 30, 2027

This Attachment A is incorporated into and made part of the Santa Rosa City Schools Service Contract between the District and CONTRACTOR. It supplements the standard contract clauses and the service terms in Sections 1–4. In the event of any conflict between this Attachment and the standard contract clauses, the terms most protective of the District shall control.

A-1. Student Privacy — FERPA School Officials Designation and Referral-Level Information Sharing

Section 13 of the Service Contract establishes CONTRACTOR’s obligation to comply with HIPAA, FERPA, and applicable California privacy laws. This section supplements Section 13 with the following provisions:

School Officials Designation. The Parties acknowledge that for the purposes of this Agreement, CONTRACTOR is a “school official” with “legitimate educational interests” in student data, as those terms are defined under FERPA and its implementing regulations (34 CFR Part 99). CONTRACTOR agrees to abide by the limitations and requirements imposed by 34 CFR 99.33(a)(2) on school officials and shall not re-disclose student information except as permitted by FERPA.

Referral-Level Information. For purposes of making referrals under this Agreement, DISTRICT may disclose to CONTRACTOR the following student information without additional parental consent: student name, date of birth, school, grade level, and insurance information. Such disclosure is authorized pursuant to FERPA and California Education Code §49076, which permit information sharing with school officials and contractors having legitimate educational interests under a formal written agreement. CONTRACTOR shall use this information solely to initiate services and process billing.

HIPAA Clarification. The Parties acknowledge that student records maintained by DISTRICT and disclosed under FERPA are education records not subject to HIPAA’s Privacy Rule, Security Rule, or Breach Notification Rule. CONTRACTOR’s clinical records created after intake may be subject to HIPAA, and CONTRACTOR is solely responsible for compliance with applicable HIPAA obligations arising from its own clinical operations.

A-2. Background Clearances

In addition to the fingerprinting requirements of Section 12 of the Service Contract, CONTRACTOR shall ensure that all clinicians and personnel assigned to District sites prior to beginning services:

- Receive clearance through DISTRICT Business Services/HR;
- Provide proof of TB testing in accordance with California Health and Safety Code requirements; and
- Obtain and display DISTRICT-issued identification or site badge.

No CONTRACTOR personnel shall begin providing services on a District campus prior to completing all clearance requirements listed above and in Section 12 of the Service Contract.

A-3. Health and Safety Termination

Notwithstanding the termination provisions of Section 11 of the Service Contract, DISTRICT may terminate this CONTRACT immediately upon written notice to CONTRACTOR if, in DISTRICT’s sole discretion,

CONTRACTOR's performance negatively impacts the health or safety of District students or staff. This provision supplements and does not replace Section 11.

A-4. Campus Scope

CONTRACTOR services under this Agreement are primarily assigned to DISTRICT secondary campuses (grades 7–12). DISTRICT reserves the right to adjust or expand service delivery to additional sites based on student need, with reasonable advance notice to CONTRACTOR. CONTRACTOR and DISTRICT will collaborate regarding clinician placement, substitution, and reassignment to ensure appropriate service delivery across assigned sites.

A-5. CYBHI Program Requirements

CONTRACTOR shall enroll directly with the California Department of Health Care Services ("DHCS") as a Medi-Cal provider and shall submit claims for CYBHI-eligible services directly to Carelon (the DHCS-designated Third Party Administrator). DISTRICT has no financial responsibility for services reimbursed through the CYBHI All Payer Fee Schedule Program. For students ineligible for CYBHI reimbursement, compensation shall be governed by Section 3 of the Service Contract.

Acknowledged and agreed as part of the Service Contract dated July 1, 2026:

DISTRICT: Santa Rosa City Schools —Lisa August Hulme

CONTRACTOR: Keystone Therapy & Training Services Inc.--- Erica Bosque



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: Stepping Stones Group LLC

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Professional Services**

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source (Code): 01 - 9228 - 0 - 1770 - 3110 - 58000 - 296 - --- % 100
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

Funding Category: Base Supplemental Concentration
 Restricted: _____ Other: GRANT FUNDED

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: New Contract Amount: 25,000.00

School Site/Department: Wellness and Engagement Number of Individuals Served: Elementar

Approved at Site by*: _____ Date: _____
 * Signature - **FOR CONTRACTS ORIGINATED BY SCHOOL SITE**

Departmental Approval**: Eric Lofchie Date: 05/22/2026
 ** Signature - **DISTRICT OFFICE DEPT. SIGNATURE**

Contract Created by: Eric Lofchie Role: Department Administrator
 Site/Dept: Wellness and Engagement Phone #: 707-729-1865

Proposed Contract Start Date: 07/01/2026 Proposed Contract End Date: 06/30/2027

Requisition #: _____

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____

Attach Signed Vendor Contract: 1 Vendor Contract

**SANTA ROSA CITY SCHOOLS
SERVICE CONTRACT**

This CONTRACT is hereby entered into between the Governing Board of the Santa Rosa City Schools, hereinafter referred to as “DISTRICT”, OR “BOARD” and Stepping Stones Group LLC, hereinafter referred to as “CONTRACTOR”.

1. Services.

(a) DISTRICT’s Responsibilities and Duties:

- Provide referrals through CONTRACTOR's electronic referral form or other mutually agreed process.
- Provide CONTRACTOR's clinicians with a private area for therapy furnished with a desk, chairs, telephone, and access to District internet/Wi-Fi for clinical documentation and billing.
- Provide available student demographic and referral information necessary for CONTRACTOR to submit claims to the DHCS-designated TPA, consistent with FERPA and California Education Code §49076.
- Provide technical specifications for backend upload of insurance information into Aeries.

See Attachment A for supplemental FERPA, HIPAA, and minor consent provisions incorporated herein.

(b) CONTRACTOR’s Responsibilities and Duties:

- Provide school-based mental health services under the CYBHI All Payer Fee Schedule Program.
- Enroll directly with DHCS as a Medi-Cal provider and submit claims to the DHCS-designated TPA. DISTRICT has no financial responsibility for CYBHI-eligible services.
- Deliver services on campuses assigned by DISTRICT (primary: elementary K–6); DISTRICT reserves the right to expand to secondary sites based on student need.
- Ensure all clinicians complete fingerprinting and DOJ clearance (Ed. Code §45125.1), HR clearance through District Business Services, TB testing, and obtain District-issued identification prior to assignment.
- Also serve students ineligible for CYBHI reimbursement (uninsured, ineligible insurance plan, or minor consent students under H&S Code §124260) and notify DISTRICT of ineligibility before initiating district-funded services. -
- Collect student insurance information and submit monthly to DISTRICT in a mutually agreed format for backend upload into Aeries.
- Any assignment to an affiliated entity under The Stepping Stones Group LLC (including ERA Psychological Services, Inc.) requires prior written consent of DISTRICT per Section 15 of this CONTRACT.
- Submit Quality Assurance reports and number of students in treatment within 10 calendar days of DISTRICT request.

See Attachment A for supplemental FERPA, HIPAA, and minor consent provisions incorporated herein.

2. Term. CONTRACTOR shall commence providing services under this CONTRACT on July 1, 2026 and will continue through June 30, 2027, subject to revision and renewal with BOARD approval in subsequent years. Pursuant to Education Code §17596, in no event shall this CONTRACT exceed a term of five (5) years.

3. Compensation. DISTRICT agrees to pay CONTRACTOR for services satisfactorily rendered pursuant to this CONTRACT a total fee not to exceed \$25,000. DISTRICT shall pay CONTRACTOR according to the following terms and conditions:

Services reimbursable through the CYBHI All Payer Fee Schedule Program shall be billed directly by CONTRACTOR to the DHCS-designated TPA; DISTRICT has no financial responsibility for those services. DISTRICT shall compensate CONTRACTOR for services to students not eligible for CYBHI reimbursement at \$105.00 per hour, prorated by actual time. Total district-funded compensation shall not exceed \$25,000 per fiscal year (July 1, 2026 – June 30, 2027). Services projected to exceed this cap require prior written authorization from DISTRICT.

4. Expected Outcomes (Deliverables). DISTRICT expects the following outcomes from the services performed by CONTRACTOR pursuant to this CONTRACT (What was the positive impact on the students? How will/is it measured?):

- Increased student access to licensed school-based mental health services across District elementary campuses.
- Timely social, emotional, and behavioral health support for students identified through the referral process.
- No student turned away due to insurance status; district-funded pathway available for ineligible students. - Monthly insurance information submitted to DISTRICT for entry into Aeries.
- Quality Assurance reports and student treatment counts provided upon request.
- Full compliance with CYBHI billing requirements, FERPA, HIPAA, and California minor consent law.

5. Expenses. Except as set forth herein, DISTRICT shall not be liable to CONTRACTOR for any costs or expenses paid or incurred by CONTRACTOR in performing services for DISTRICT.

6. Independent Contractor. CONTRACTOR, in the performance of this CONTRACT, shall be and act as an independent contractor. CONTRACTOR understands and agrees that he/she and all of his/her employees shall not be considered officers, employees or agents of the DISTRICT, and are not entitled to benefits of any kind or nature normally provided employees of the DISTRICT and/or to which DISTRICT'S employees are normally entitled, including, but not limited to, State Unemployment Compensation, Workers' Compensation, Health and Welfare Benefits, Paid Vacation, Retirement Program Participation, or any other employee benefits. CONTRACTOR assumes the full responsibility for the acts and/or omissions of his/her employees or agents as they relate to the services to be provided under this CONTRACT. CONTRACTOR shall assume full responsibility for payment of all federal, state, and local taxes or contributions, including unemployment insurance, social security, and income taxes with respect to CONTRACTOR and CONTRACTOR'S employees.

7. Materials. CONTRACTOR shall furnish, at his/her own expense, all labor, materials, equipment, supplies and other items necessary to complete the services to be provided pursuant to this CONTRACT. CONTRACTOR'S services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of his/her profession.

8. Taxes. Federal Internal Revenue Service's regulations require that school districts report all payments to individuals for CONTRACTOR services. CONTRACTOR agrees to file federal and state tax returns and pay all applicable state and federal taxes on amounts paid pursuant to this CONTRACT. In the event DISTRICT is audited for compliance regarding any applicable taxes, CONTRACTOR agrees to furnish DISTRICT with proof of payment of taxes on these earnings.

9. Indemnification:

- (a) CONTRACTOR shall indemnify, defend with counsel acceptable to DISTRICT, and hold harmless to the full extent permitted by law, DISTRICT and its Board of Trustees, officers, agents, employees and volunteers from and against any and all liability, loss, damage, claims, expenses and costs (including, without limitation, attorney fees and costs and fees of litigation) (collectively, "Liability") of every nature arising out of or in connection with CONTRACTOR'S performance or failure to perform its obligations under this CONTRACT, except such Liability caused by the active negligence, sole negligence or willful misconduct of the DISTRICT. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable to or for CONTRACTOR or its agents under workers' compensation acts, disability benefit acts, or other employee benefit acts. Notwithstanding the foregoing, however, in the event that a court determines that liability with respect to any Liability was caused or contributed to by the negligent act, error, omission or the willful misconduct of DISTRICT, liability will be apportioned between CONTRACTOR and DISTRICT with regard to such Liability based upon the parties' respective degrees of culpability, as determined by the court, and CONTRACTOR's duty to indemnify DISTRICT with respect to satisfaction of the judgment only (but not to costs of defense previously incurred by CONTRACTOR) will be limited accordingly.
- (b) CONTRACTOR shall be liable to DISTRICT for any loss or damage to DISTRICT property arising from or in connection with CONTRACTOR'S performance hereunder, if and to the extent caused by CONTRACTOR or any agent or representative of CONTRACTOR.

10. Insurance: With respect to the performance of work under this CONTRACT, CONTRACTOR shall maintain and shall require all of its subcontractors, if any, to maintain insurance as indicated below:

(a) Worker's compensation insurance with statutory limits as required by the Labor Code or the State of California. The policy shall be endorsed with the following specific language: "This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to the DISTRICT".

(b) Commercial or Comprehensive General Liability insurance covering bodily injury and property damage using an occurrence policy form, in an amount no less than \$1,000,000 per occurrence, \$2,000,000 aggregate. Such insurance shall include, but not be limited to premises and operations liability, independent CONTRACTOR's liability, and personal injury liability.

(c) Automobile liability insurance covering bodily injury and property damage in an amount no less than \$1,000,000 combined single limit for each occurrence. Such insurance shall include coverage for owned, hired, and non-owned vehicles.

(d) Each such comprehensive or commercial general liability and automobile liability insurance policy shall be endorsed with the following specific language:

(1) DISTRICT, its officers and employees, is named as additional insured for all liability arising out of the operations by or on behalf of the named insured in the performance of this CONTRACT.

(2) The inclusion of more than one insured shall not operate to impair the rights of one insured against another insured, and the coverage afforded shall apply as though separate policies had been issued to each insured, but the inclusion of more than one insured shall not operate to increase the limits of the company's liability.

(3) The insurance provided herein is primary coverage to DISTRICT with respect to any insurance or self-insurance programs maintained by DISTRICT and no insurance held or owned by DISTRICT shall be called upon to contribute to a loss.

(4) This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to DISTRICT.

(e) Sexual Abuse and Molestation coverage in an amount no less than \$1,000,000 per occurrence, with an annual aggregate of \$2,000,000, endorsed with the following specific language: "This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to DISTRICT." **[Required if Contractor will be directly supervising children]**

(f) Professional Liability (Errors and Omissions) Insurance for all activities of the CONTRACTOR arising out of or in connection with this CONTRACT is an amount no less than \$1,000,000 combined single limit for each occurrence endorsed with the following specific language: "This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to DISTRICT." **[Required if Professional Services is checked on first page]**

(g) Documentation: The following documentation shall be submitted to the DISTRICT:

(1) Properly executed certificates of insurance clearly evidencing all coverages, limits, and endorsements required above. The certificates shall be submitted prior to commencement of services under this CONTRACT.

(2) Signed copies of the specified endorsements for each policy. Said endorsement copies shall be submitted within thirty (30) days of execution of this CONTRACT.

(3) Upon DISTRICT'S written request, certified copies of insurance policies. Such policy copies shall be submitted within thirty (30) days of DISTRICT'S request.

(h) Policy Obligations: CONTRACTOR'S indemnity and other obligations shall not be limited by the foregoing insurance requirements.

(i) Material Breach: If CONTRACTOR, for any reason, fails to maintain insurance coverage, which is required pursuant to this CONTRACT; the same shall be deemed a material breach of contract. DISTRICT, at its sole option, may terminate this CONTRACT and obtain damages from the CONTRACTOR resulting from the breach. Alternatively, DISTRICT may purchase such required insurance coverage, and without further notice to CONTRACTOR, County may deduct from sums due to CONTRACTOR any premium costs advanced by DISTRICT for such insurance. These remedies shall be in addition to any other remedies available to DISTRICT.

11. Termination:

(a) DISTRICT may terminate this CONTRACT without cause by giving thirty (30) calendar days written notice to CONTRACTOR. In the event DISTRICT elects to terminate the CONTRACT without cause, it shall pay CONTRACTOR for services satisfactorily rendered to such date.

(b) If either party fails to perform any of its obligations hereunder, within the time and in the manner hereunder provided or otherwise violates any of the terms of the CONTRACT, either party may immediately terminate this CONTRACT by giving written notice of such termination, stating the reason for such termination. In such event, CONTRACTOR shall be entitled to receive payment for all services satisfactorily rendered, provided, however, that there shall be deducted from such amount the amount of liquidated damages, if any, sustained by DISTRICT by virtue of any breach of the CONTRACT by CONTRACTOR.

12. Fingerprints. The DISTRICT has considered the totality of the services to be provided under this CONTRACT and has determined that CONTRACTOR and CONTRACTOR'S employees are subject to the fingerprinting requirements of Education Code section 45125.1. CONTRACTOR shall submit fingerprints for review by the Department of Justice and authorize DISTRICT to receive subsequent arrest and conviction notifications.

13. Confidentiality. CONTRACTOR acknowledges the protections afforded to student health and related information under regulations adopted pursuant to the Health Insurance Portability and Accountability Act of 1996 (HIPAA), student records under the Family Educational Rights and privacy Act (FERPA), and under provisions of state law and DISTRICT policy relating to privacy. CONTRACTOR shall ensure that all activities undertaken pursuant to this CONTRACT comply with these requirements.

14. Ownership of Work Product: DISTRICT shall be the owner of and shall be entitled to immediate possession of accurate reproducible copies of any work product gathered or computed by CONTRACTOR prior to termination of this CONTRACT by DISTRICT or upon completion of the work pursuant to this CONTRACT.

15. Assignment. The obligations of the CONTRACTOR pursuant to this CONTRACT shall be performed solely by CONTRACTOR and shall not be assigned or transferred by the CONTRACTOR to any third party or employee/agent of CONTRACTOR without the DISTRICT'S prior written consent.

16. Compliance with Applicable Laws. The services completed herein must meet the approval of the DISTRICT and shall be subject to the DISTRICT'S general right of inspection to secure the satisfactory completion thereof. CONTRACTOR agrees to comply with all federal, state, and local laws, rules, regulations, and ordinances that are now or may in the future become applicable to CONTRACTOR, CONTRACTOR'S business, equipment, and personnel engaged in operations covered by this CONTRACT or accruing out of the performance of such operations.

17. Permits/Licenses. CONTRACTOR shall secure and maintain in force such permits and licenses as are required by law in connection with the furnishing of services pursuant to this CONTRACT.

18. Entire CONTRACT/Amendment. This CONTRACT and any attachments constitute the entire CONTRACT among the parties to it and supersede any prior or contemporaneous understanding or CONTRACT with respect to the services contemplated, and may be amended only by a written amendment executed by both parties. Should the CONTRACT terms conflict with any amendments attached hereto, this CONTRACT shall govern.

19. Notice. All notices or demands to be given under this CONTRACT by either to the other shall be in writing and given either by (a) personal service or (b) by postage prepaid U.S. Mail, registered or certified, return receipt requested. Service of notice or demand shall be considered given when received if personally served or, if mailed, on the second day after deposited at any U.S. Post Office. The address to which either party may give notices or demands may be changed by written notice given in accordance with the notice provisions of this section. At the date of this CONTRACT, the addresses of the parties are as follows:

DISTRICT:

Santa Rosa City Schools
211 Ridgway Ave

Santa Rosa, CA 95401

707-890-3800

kcook@srcs.k12.ca.us

CONTRACTOR:

Name:

Street:

City/State/Zip:

Phone:

Email:

20. Nondiscrimination. CONTRACTOR shall comply with all applicable federal, state, and local laws, rules and regulations in regard to nondiscrimination in employment because of race, color, ancestry, national origin, religion, sex, marital status, age, medical condition, handicap, or other prohibited basis. All nondiscrimination rules or regulations required by law to be included in this CONTRACT are incorporated by this reference.

21. Extra (Changed) Work. Only the Superintendent may authorize extra (and/or changed) work, which shall be in writing and thereafter ratified by the Board. The parties expressly recognize that DISTRICT and DISTRICT personnel are without authorization either to order extra (and/or changed) work or to waive contract requirements. Failure of the CONTRACTOR to secure proper authorization for extra work shall constitute a waiver of any and all right to adjustment in the contract price or contract time due to such unauthorized extra work and the CONTRACTOR thereafter shall be entitled to no compensation whatsoever for the performance of such work.

22. Conflict of Interest. CONTRACTOR represents that it presently has no interest, which would conflict in any manner or degree with the performance of services contemplated by this CONTRACT. CONTRACTOR further represents that in the performance of this CONTRACT, no person having such interest will be employed. If CONTRACTOR participates in the planning, development, or negotiation of a contract for the District, CONTRACTOR may not subsequently acquire a financial interest in that contract in violation of Government Code section 1090.

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

24. Governing Law. The terms and conditions of this CONTRACT shall be governed by the laws of the State of California with venue in Sonoma County, California, and no other place.

THIS CONTRACT IS ENTERED INTO THIS 10th day of June, 2026.

DISTRICT

AUTHORIZED SIGNER *or* CONTRACTOR

Signature: _____

Signature: _____

Lisa August Hulme

Print Name:

Interim Superintendent

Title:

kcook@srcs.k12.ca.us

Email:

707-890-3800 x80201

Phone:

SRCS Board Approved: _____

ATTACHMENT A — SUPPLEMENTAL PROVISIONS

Santa Rosa City Schools Service Contract

SSG School Psychology and Mental Health, PC (d/b/a The Stepping Stones Group LLC)

July 1, 2026 – June 30, 2027

This Attachment A is incorporated into and made part of the Santa Rosa City Schools Service Contract between the District and CONTRACTOR. In the event of any conflict between this Attachment and the standard contract clauses, the terms most protective of the District shall control, except that with respect to CYBHI service delivery, the terms of the CYBHI Memorandum of Understanding executed concurrently between the Parties shall control.

A-1. Student Privacy, FERPA, and HIPAA

CONTRACTOR and DISTRICT shall comply with all applicable federal and state laws regarding the confidentiality and handling of student records and information, including the Health Insurance Portability and Accountability Act ("HIPAA"), the Family Educational Rights and Privacy Act ("FERPA"), and applicable California student privacy laws.

School Officials Designation. The Parties acknowledge that for the purposes of this Agreement, CONTRACTOR is a "school official" with "legitimate educational interests" in student data, as those terms are defined under FERPA and its implementing regulations (34 CFR Part 99). CONTRACTOR agrees to abide by the limitations and requirements imposed by 34 CFR 99.33(a)(2) on school officials and shall not re-disclose student information except as permitted by FERPA.

Referral-Level Information Sharing. For purposes of making referrals under this Agreement, DISTRICT may disclose to CONTRACTOR the following student information without additional parental consent: student name, date of birth, school, grade level, and insurance information. Such disclosure is authorized pursuant to FERPA and California Education Code §49076, which permit information sharing with school officials and contractors having legitimate educational interests under a formal written agreement. CONTRACTOR shall use this information solely to initiate services and process billing.

Minor Consent Students. Students who self-consent to services under California Health & Safety Code §124260 are governed by applicable minor consent confidentiality protections. DISTRICT's obligation to obtain prior written parental consent shall not apply to referrals or disclosures made on behalf of minor consent students. CONTRACTOR shall not seek or require parental consent for minor consent students, and shall maintain the confidentiality of those students' participation in services.

HIPAA Clarification. The Parties acknowledge that student records maintained by DISTRICT and disclosed under FERPA are not subject to HIPAA's Privacy Rule, Security Rule, or Breach Notification Rule. CONTRACTOR's clinical records created after intake may be subject to HIPAA, and CONTRACTOR is solely responsible for compliance with applicable HIPAA obligations arising from its own clinical operations.

CONTRACTOR shall not use student information for any purpose other than providing services pursuant to this CONTRACT. CONTRACTOR shall not disclose student information to any third party other than clinical documentation and billing system vendors necessary to process documentation and claims submissions.

A-2. Insurance Information and Student Information System

CONTRACTOR shall support the collection of student insurance information necessary for billing under this Agreement. Where insurance information is not available in DISTRICT's student information system at the time of referral, CONTRACTOR shall collect such information from the student's family or guardian as part of the intake process.

CONTRACTOR shall submit all collected insurance information to DISTRICT on a monthly basis, no later than the last day of each month, in a mutually agreed-upon data format suitable for backend upload by DISTRICT staff into DISTRICT's student information system (currently Aeries). CONTRACTOR may alternatively fulfill this obligation through direct entry into Aeries if DISTRICT provides appropriate system access.

DISTRICT shall provide CONTRACTOR with the technical specifications necessary to fulfill this obligation.

A-3. Background Clearances

In addition to the fingerprinting requirements of Section 12 of the Service Contract, CONTRACTOR shall ensure that all clinicians and personnel assigned to District sites:

- (e) Receive clearance through DISTRICT Business Services/HR prior to assignment;
- (f) Provide proof of TB testing in accordance with California Health and Safety Code requirements; and
- (g) Obtain and display DISTRICT-issued identification or site badge.

No CONTRACTOR personnel shall begin providing services on a District campus prior to completing all clearance requirements listed above and in Section 12 of the Service Contract.

A-4. Health and Safety Termination

Notwithstanding the termination provisions of Section 11 of the Service Contract, DISTRICT may terminate this CONTRACT immediately upon written notice to CONTRACTOR if, in DISTRICT's sole discretion, CONTRACTOR's performance negatively impacts the health or safety of District students or staff. This provision supplements and does not replace Section 11.

A-5. Affiliated Entity Network

CONTRACTOR operates as part of a network of affiliated professional corporations under The Stepping Stones Group LLC. Consistent with Section 15 of the Service Contract, any assignment or transition of services to an affiliated entity — including but not limited to ERA Psychological Services, Inc. — requires prior written consent of DISTRICT. Where applicable procurement thresholds are triggered, Board re-approval may be required. CONTRACTOR shall provide DISTRICT with no less than thirty (30) days written notice prior to any such assignment, and shall ensure that any transition does not result in: (a) interruption of services; (b) material change in personnel; or (c) modification of scope or quality.

A-6. CYBHI Program Requirements

CONTRACTOR shall enroll directly with the California Department of Health Care Services ("DHCS") as a Medi-Cal provider and shall submit claims for CYBHI-eligible services directly to the DHCS-designated Third Party Administrator ("TPA"). DISTRICT has no financial responsibility for services reimbursed through the CYBHI All Payer Fee Schedule Program. For students ineligible for CYBHI reimbursement, compensation shall be governed by Section 3 of the Service Contract.

Acknowledged and agreed as part of the Service Contract dated July 1, 2026:

DISTRICT: Santa Rosa City Schools — Lisa August Hulme

CONTRACTOR: SSG School Psychology and Mental Health, PC



Board Target Date: _____

Request for Board Approval of Contract

Vendor/Contractor/Consultant: Softchoice Corporation

SCHOOL SITE/DEPARTMENT USE ONLY

Select one of the following: Independent Contractor/Business/Organization*

- * Any person, business, or organization that will be providing non-professional services to the District
- ** Any person, business, or organization that will be providing professional services to the District (Usually as a result of an RFP, i.e., services that require extensive technical knowledge or training in their particular area of expertise.) Engineers, Financial Advisors, Architects, Auditors, Surveyors, Inspectors, etc.
- *** Two or more persons, businesses, corporations, or organizations that will be partnering with the District to perform certain services with the District

SCHOOL SITE/DEPARTMENT USE ONLY

Funding Source (Code): 01 - 0000 - 0 - 0000 - 7700 - 5817 - 388 - 5189 % 7 cd
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____
 _____ - _____ - _____ - _____ - _____ - _____ - _____ - _____ % _____

Funding Category: Base Supplemental Concentration Restricted: _____ Other: District & Numerous Sites General Funds

For Billing (if applicable): Bill to: _____ Billing frequency: _____

Contract is: New Contract Amount: \$15,498.00

School Site/Department: MIST/IT Number of Individuals Served: 315

Approved at Site by*: _____ Date: _____
 * Signature - **FOR CONTRACTS ORIGINATED BY SCHOOL SITE**

Departmental Approval**: Adrian Bica Date: 05/22/2026
 ** Signature - **DISTRICT OFFICE DEPT. SIGNATURE**

Contract Created by: Bea Gonzales Role: Department Secretary
 Site/Dept: MIST/IT Phone #: 707-890-3877

Proposed Contract Start Date: 08/01/2026 Proposed Contract End Date: 07/31/2027

Requisition #: R27-00055

BUSINESS SERVICES USE ONLY

Verified Receipt of: Insurance(s) W-9 Form HR Clearance, if applicable

Board Approval Date: _____ Approval by Superintendent

Attach Signed Vendor Contract: 1 Vendor Contract



Softchoice Corporation
 1 World Wide Way, Saint
 Louis, MO 63146, United
 States

Sales/Order desk
 Phone: (800) 268-7638
 Fax: (800) 268-7639

Quote	Q-2821376
Date	22-May-2026

Quote

Ship To :
 Adrian Bica
 Santa Rosa City School Dist
 211 RIDGWAY AVE
 SANTA ROSA, CA 95401

Bill To:
 Adrian Bica
 Santa Rosa City School Dist
 211 RIDGWAY AVE
 SANTA ROSA, CA
 95401

Quote Prepared For	Adrian Bica Santa Rosa City School Dist Phone: 707.890.3800 x 80501 Email: abica@srcs.k12.ca.us
Quote Sent By	Horacio Rodriguez horacio.rodriguez@softchoice.com Phone: 3126559002 Fax:
Anniversary Date	
Authorization Number	
Agreement End Date	
Comments	

CAMSA EES - Year 1 Initial Order, 12 Months - FAC - Net New Enrollment
June 01 2026 Coverage and Usage Start
COU USA
AAD-38391 FAC Level C Proposal ID: BD-133419-T3T2H7

Item #	Mfg SKU #	Description	Qty	Billing Frequency	Start Date	End Date	Usage Country	License Type	Unit Price	Extended Price
2000279437	AAD-38391	M365 EDU A3 Unified ShrdSvr ALNG SubsVL MVL PerUsr	315	Upfront	01-Aug-2026	31-Jul-2027	United States	Subscription	\$49.20	\$15,498.00
GROUP TOTAL										\$15,498.00

CAMSA EES - Year 1 Initial Order, 12 Months - STU - Net New Enrollment

**June 01 2026 Coverage and Usage Start
COU USA**

Item #	Mfg SKU #	Description	Qty	Billing Frequency	Start Date	End Date	Usage Country	License Type	Unit Price	Extended Price
2000279443	AAD-38397	M365 EDU A3 Unified ShrdSvr ALNG SubsVL MVL PerUsr STUUseBnft	12600	Upfront	01-Aug-2026	31-Jul-2027	United States	Subscription	\$0.00	\$0.00
GROUP TOTAL										\$0.00

SUBTOTAL	\$15,498.00
DELIVERY: Ground - 3 to 5 days	\$0.00
State Tax	\$0.00
Local Tax	\$0.00
All currency in this quote is in (USD).	TOTAL
	\$15,498.00

Payment options are only available in listed currency and not billable in other currencies. Pricing, availability, and special offers are subject to change at any time. This document and the transaction(s) to which it pertains are governed by Softchoice's online terms of sale, unless a separate purchase agreement was signed by both your company and Softchoice, in which case, that separate agreement will govern. Softchoice's terms of sale can be found <http://www.softchoice.com/softchoice-terms-and-conditions-for-products>

As noted in the Microsoft Enterprise Agreement, any online subscription services within this quote will automatically renew annually unless Softchoice is notified in writing at least 30 days prior to your anniversary. If you are within the final year of your agreement the previous statement does not apply; new products and quantities will be reviewed in your renewal process.

Signature :

Name :

Title :

Date :

PO# : {{PO es .signer1}}