



October 4, 2023

Joel Dontos
Executive Director of Fiscal Services
Santa Rosa City Schools
211 Ridgway Ave
Santa Rosa, CA 95401

Re: Engagement Letter for GASB 75 Actuarial Services – Santa Rosa City Schools

Dear Joel:

Thank you for this opportunity to provide GASB 75 Other Postemployment Benefit (OPEB) actuarial services to Santa Rosa City Schools (the District). This letter documents the services we will provide for the District's retiree health plan and our fees for those services. This letter and attachments (collectively, the "Agreement") document the Scope of Services ("Services") that Northern Consulting Actuaries, Inc. d/b/a VIA Actuarial Solutions (hereafter, "VIA" or "we" or "our") will provide to the Santa Rosa City Schools (hereafter "District" or "you" or "yours" or "Client") and the Santa Rosa City Schools retiree healthcare plan (hereafter "Plan"). It also describes our fees, expenses, and the Terms and Conditions for those services.

After reviewing the enclosed Scope of Services and Terms and Conditions, please sign and date the Acknowledgement and Consent form. Future actuarial services will be provided under this same engagement letter for a fee agreed to by both parties, or we can provide an updated engagement letter if you prefer.

Please feel free to contact us if you have any questions about the proposed actuarial engagement. We will commence work under this engagement upon receipt of a signed copy of this Agreement.

Thank you again for choosing VIA Actuarial Solutions to be your trusted actuarial consultant.

Sincerely,

A handwritten signature in black ink that reads "Emily Erickson".

Emily A. Erickson, ASA, MAAA
Consulting Actuary

L/D/C/R: 3/lp/eae



Scope of Services

The GASB 75 accounting rules require a “full” actuarial valuation every two years, while a simplified roll-forward report is required in the “off years”. Our proposed scope and fees outlined below include both the “full” and roll-forward valuation reports.

Services Provided	Fixed Fee
FYE2024 “full” GASB 75 actuarial valuation report	\$12,500
FYE2025 GASB 75 roll-forward valuation report	\$2,500

Out-of-scope projects will be billed separately based on the time and expense needed to complete these projects. For calendar year 2023, our hourly rates are \$125 to \$225 for actuarial analysts and managers and \$335 to \$385 for consulting actuaries. We are glad to estimate fees for additional projects as requested. Out-of-scope projects may include time spent on:

- meetings and preparation,
- significant changes in your plan, accounting, or funding arrangements,
- cleanup of inaccurate data or data not provided in the form requested, and
- accounting updates when the District’s financials differ from the figures in our previous reports.

The annual fees and hourly rates stated in this engagement letter are subject to annual inflationary updates beginning in 2026 and each year thereafter. VIA will propose inflationary adjustments to the District before beginning work on the FYE2026 valuation. The hourly rate schedule is updated automatically each calendar year.

The proposed fees assume no substantial changes to the plan census, assumptions, plan provisions, or funding arrangement. If any of these factors change significantly then we will provide a separate proposed fee.

Out-of-pocket expenses will be passed on to you without markup. Bills are sent as often as monthly, and your payment is due within 30 days of the invoice date. Interest will accrue on the unpaid balance at the rate of ½% per month. If we receive your payment within 30 days, the interest will be waived.

Terms and Conditions

COOPERATION AND WARRANTY REGARDING DOCUMENTS AND INFORMATION.

You understand that in order for us to provide the Services to you we will require your assistance and cooperation. You agree to provide us with all documents and information reasonably requested by us in order for us to perform the Services and you warrant that such documents and information are true and accurate to the best of your knowledge after due inquiry. We will not be liable for any inaccurate results of our Services due to our reliance upon incorrect or incomplete documents or information.

CONFIDENTIALITY. All data, records, and information concerning the Plan and the participants of the Plan provided by you or on your behalf to VIA in connection with this Agreement, other than information that is either in the public domain, obtained from third parties, or which is otherwise developed by VIA shall be considered "Confidential Client Information." VIA agrees to use reasonable efforts to protect all Confidential Client Information and has reasonable safeguards to protect against the disclosure or misuse of Confidential Client Information that is in VIA's care or custody. VIA will protect the Confidential Client Information with the same degree of care that it uses to protect and safeguard VIA's own like information, but not less than the degree of care that would be exercised by a prudent person given the sensitivity of the Confidential Client Information. In preserving the confidentiality of Client communications and information, it is important that we have your agreement on the methods we will use in communicating with you. Unless you tell us otherwise, you agree that it is appropriate to use mail and emails in the course of our providing the Services to you without encryption or other special measures. The exception is transmission of participant census data which must be transmitted using our secure data transfer site or similar method. Please let us know if you have special requests or requirements for the methods of communication or persons to be included in such communications.

RETENTION OF RECORDS. We will retain final copies of actuarial work products for seven years after completion of each project. Although we keep copies of the work we perform for you for seven years, these copies are solely for our files. The plan sponsor is responsible for keeping copies of all documents needed for the Plan's permanent records, including copies of the work we perform for you and the information we send to you.

INDEMNIFICATION. You agree as part of this engagement to indemnify and hold harmless VIA from and against any and all claims, losses, damages, liabilities, costs, and other expenses of any kind whatsoever (including, without limitation, all reasonable attorneys' fees and collection or court costs) arising from or in connection with the operation of the Plan or the rendering of plan-related services by the Client, the Plan Administrator, or any third party. This indemnification does not include claims, losses, damages, liabilities, costs, and expenses attributable solely to any gross negligence or willful misconduct by VIA in the performance of our responsibilities under this engagement.

We agree as part of this Agreement to indemnify and hold harmless the Client and the Plan from and against any and all claims, losses, damages, liabilities, costs, and other expenses of any kind whatsoever (including, without limitation, all reasonable attorneys' fees and collection or court costs) (collectively "Claims") arising from or in connection with the operation of the Plan or the rendering of plan-related services by VIA, to the extent that such Claims are attributable solely to gross negligence or willful misconduct by VIA in the performance of our responsibilities under this engagement.

Terms and Conditions *(continued)*

REPRESENTATIONS AND WARRANTIES. We represent and warranty that we (a) have the right, power and authority to enter into this Agreement and to fully perform all of our obligations hereunder; and (b) will use commercially reasonable efforts to provide all services required of us under the Agreement in accordance with prevailing industry standards. You represent and warranty that you have the right, power, and authority to enter into this Agreement and to fully perform all of your obligations hereunder.

NO ASSIGNMENT OR DELEGATION. Neither VIA nor you may assign this Agreement in whole or in part, nor delegate any part or all of its duties, without the other's prior written consent.

SEVERABILITY. If any provision of this Agreement is held to be or is invalid or unenforceable, the validity and/or enforceability of the remaining portions shall not be impaired or affected in any way. A waiver of any provision of this Agreement does not likewise waive any other provision of this Agreement.

MODIFYING THIS ENGAGEMENT. The terms of this engagement between you and us represented by this Agreement shall not be subject to modification (except with regard to fees, as outlined above), except as agreed upon in writing by both you and us.

TERM AND TERMINATION. This engagement letter is effective beginning July 1, 2023 and shall automatically renew on an annual basis unless terminated earlier by either party as described below. Future actuarial services will be provided under this same engagement letter for a fee agreed to by both parties and described in a new Scope of Services, or we can provide an updated engagement letter if you prefer.

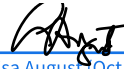
You have the right to terminate our services with 60 days prior written notice. Termination of our services will not relieve you of the obligation to pay for all accrued charges and expenses for work through the end of our engagement. We will have the same right of termination, subject to our obligation to give you 60 days prior written notice. If our billing statements are not timely paid, however, we will have the right to terminate our Services upon 5 days prior written notice following a default in the payment of our fees and expenses, upon the expiration of which notice period we will have the right to not provide any Services or advance any expenses until all amounts due are paid in full. Furthermore, if we are required to take action to collect our fees and expenses, you agree to pay all professional fees (including reasonable attorneys' fees) and expenses incurred by us in such collection action.

ENTIRE AGREEMENT. Our performance of the Services is subject to the terms of this letter, including our Terms and Conditions ("Terms and Conditions"). This letter, together with the Scope of Services and these Terms and Conditions, constitute the entire Agreement between VIA Actuarial Solutions and you and supersede all previous agreements between us whether written or oral. Should the scope of our Services change, you agree that we will either amend the Scope of Services or we will execute a new engagement letter incorporating such changes. We will not be required to provide Services not included in the Scope of Services agreed to in this letter.

Acknowledgement and Consent

The undersigned authorized representative of Santa Rosa City Schools (the District) has read this letter from VIA Actuarial Solutions, understands its contents, and agrees on behalf of the District to the Scope of Services; fees and expenses; and Terms and Conditions set forth in the Agreement.

Date: October 17, 2023

By  Lisa August (Oct 18, 2023 13:20 PDT)

Title Associate Superintendent






FY2024-2025 GASB 75 Engagement Letter_Santa Rosa Schools

Final Audit Report

2023-10-18

Created:	2023-10-17
By:	Simona Hoyos (shoyos@srcs.k12.ca.us)
Status:	Signed
Transaction ID:	CBJCHBCAABAAk15svHopRqZJY5E73ErZoxhGH1J6aFKB

"FY2024-2025 GASB 75 Engagement Letter_Santa Rosa Schools" History

-  Document created by Simona Hoyos (shoyos@srcs.k12.ca.us)
2023-10-17 - 11:00:58 PM GMT
-  Document emailed to Lisa August (laugust@srcs.k12.ca.us) for signature
2023-10-17 - 11:01:23 PM GMT
-  Email viewed by Lisa August (laugust@srcs.k12.ca.us)
2023-10-18 - 8:20:31 PM GMT
-  Document e-signed by Lisa August (laugust@srcs.k12.ca.us)
Signature Date: 2023-10-18 - 8:20:38 PM GMT - Time Source: server
-  Agreement completed.
2023-10-18 - 8:20:38 PM GMT

Agreement for Sonoma County Schools Connect Consortium

Telecommunications Services to Public Schools

Sonoma County Superintendent of Schools

Amie Carter, Superintendent

THIS AGREEMENT, made and entered into as of this first day of July, **2023**, by and between the **SONOMA COUNTY SUPERINTENDENT OF SCHOOLS** (hereinafter referred to as SCOE) acting as the lead Local Education Agency (LEA) on behalf of the SONOMA COUNTY SCHOOLS CONNECT CONSORTIUM FOR TELECOMMUNICATIONS, and **Santa Rosa City Elementary** hereinafter referred to as "School/District;"

WHEREAS, SCOE, acting as the lead Local Education Agency (LEA) on behalf of the SONOMA COUNTY SCHOOLS CONNECT CONSORTIUM FOR TELECOMMUNICATIONS, seeks to provide telecommunications services to the Sonoma County school districts; and

WHEREAS, in order to provide such services, SCOE is authorized to purchase or acquire equipment and apparatus, to service and maintain the equipment and apparatus, and to distribute the same to the school districts in Sonoma County; and

WHEREAS, the School/District wishes to receive services in accordance with the terms of this Agreement; NOW THEREFORE, IT IS AGREED as follows:

1. **Services:** The Sonoma County Schools Connect Consortium for Telecommunications shall provide the following:
 - Access to Sonoma County Schools Connect Consortium for Telecommunications Wide Area Network
 - Internet filtering services to remain compliant with federal CIPA regulation and to receive E-Rate funding
 - Internet firewall services to protect the network from unauthorized access
 - Connection to SCOE financial system via the WAN
 - WAN equipment and maintenance
 - Wide Area Network technical support and site contact personnel training
 - Additional technical site support by contract from screened vendors
 - Support for SIS and CALPADS
 - Optional hosted email
 - Optional email filtering
 - Optional server/virtual server hosting
 - Optional hosted Aeries SIS
2. **Payment:** School/District agrees to pay SCOE for its services under this Agreement pursuant to the attached addendum for Schools Connect Consortium Fees. The parties agree that the addendum will be revised yearly to reflect changes to enrollment, services, and circuits. School/District will issue payment to SCOE within thirty (30) days of receipt of final invoice from SCOE.

Annual fees may be increased in any subsequent contract year if SCOE and/or the Sonoma County Schools Connect Consortium for Telecommunications give written notice to the School/District by April 30th of each contract year of the increased amount for the following year.
3. **Contingencies:** Circuit fees are contingent on receiving federal E-Rate and California Teleconnect Fund (CTF) discounts. SCOE will use School/District enrollment and Free and Reduced Lunch counts certified on the CALPADS Fall 1 reporting on the E-Rate application. School/District will provide a signed Form 479 to certify CIPA compliance. Once each five years School/District will sign a Letter of Agency to allow SCOE to file for E-Rate on their behalf.
4. **Term and Renewal:** The term of this Agreement shall be **July 1, 2023 to June 30, 2026**, unless, at least one year and one day prior to the end of any fiscal year in which the Agreement is in effect, either party gives notice in writing to the other party of its intent to withdraw from the Agreement. School/District will be required to compensate SCOE for all services rendered through the date of termination. School/District may be obligated to continue its vendor services contracts beyond the term of this Agreement. If the School/District withdraws from this Agreement, it will not be eligible to return as a member of the Schools Connect Consortium for three years from the expiration of the previous term.
5. **Copyright:** School/District shall comply with and shall be solely liable for any violations of the United States Copyright Law (17 U.S.C. Section 101 et seq.).
6. **Acceptable Use Policies:** School/District assumes the responsibility for adopting an Acceptable Use Policy for telecommunication uses by staff and students via the Schools Connect Consortium Wide Area Network.
7. **Service Attacks:** Should SCOE determine that there has been a service attack, School/District shall work with SCOE to determine the source of the attack and shall stop the attack and mitigate all damages immediately upon determination that School/District caused the attack. SCOE retains the right to terminate this Agreement and disconnect School/District's service if they are determined to be the cause of the attack.
8. **Indemnity/Hold Harmless:** School/District shall defend with counsel acceptable to SCOE, indemnify and hold harmless to the full extent permitted by law, SCOE 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 this Agreement or its failure to comply with any of its obligations contained in these contract documents, except such Liability caused by the active negligence, sole negligence or willful misconduct of SCOE.

**Agreement for Sonoma County Schools Connect Consortium
Telecommunications Services to Public Schools
Sonoma County Superintendent of Schools
Amie Carter, Superintendent**

IN WITNESS WHEREOF, the parties hereto have set their hands to this Agreement on the day and year first above written.

Superintendent
Santa Rosa City Elementary

Date

Amie Carter, Superintendent of Schools
Sonoma County Office of Education

Date

**2023-24 Schools Connect Consortium Addendum
Santa Rosa City Elementary**

Consortium Member fee - \$5 per 4750 students*	\$0.00
CIPA compliant filtering service - \$.64 per 4750 students*	\$0.00
Connection Fee	\$1200.00
DP Fee - \$5 per 4750 students* (min \$1200)	\$23750.00
Aeries hosting - \$250 per 0 database (Optional)	\$0.00
Barracuda Email filtering (Optional)	\$0.00
Hosted Servers/Virtual servers (Optional)	\$0.00
Hosted Virtual Desktop (Optional)	\$0.00
Hotspot - \$12.00 per month/ per Hotspot* 0 (Optional)	\$0.00
VPN Connection - \$36 per 0 VPN* (Optional)	\$0.00
Security Sentinel One (Optional)	\$0.00
Total SCOE services	\$24950.00
Internet circuits – total circuits per district	\$0.00
Less E-Rate and CTF discounts	- \$0.00
Net circuit cost	\$0.00
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Total Consortium Costs	\$24950.00

* Enrollment count based on 22-23 CALPADS 1.17 report

* VPN count based on 22-23 invoice

* Hotspot count based on 22-23 invoice

Agreement for Sonoma County Schools Connect Consortium

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**Agreement for Sonoma County Schools Connect Consortium
Telecommunications Services to Public Schools
Sonoma County Superintendent of Schools
Amie Carter, Superintendent**

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Superintendent
Santa Rosa City High

Date

Amie Carter, Superintendent of Schools
Sonoma County Office of Education

Date

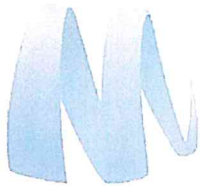
**2023-24 Schools Connect Consortium Addendum
Santa Rosa City High**

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CIPA compliant filtering service - \$.64 per 10179 students*	\$0.00
Connection Fee	\$0.00
DP Fee - \$5 per 10179 students* (min \$1200)	\$50895.00
Aeries hosting - \$250 per 0 database (Optional)	\$0.00
Barracuda Email filtering (Optional)	\$0.00
Hosted Servers/Virtual servers (Optional)	\$0.00
Hosted Virtual Desktop (Optional)	\$0.00
Hotspot - \$12.00 per month/ per Hotspot* 0 (Optional)	\$0.00
VPN Connection - \$36 per 1 VPN* (Optional)	\$36.00
Security Sentinel One (Optional)	\$0.00
Total SCOE services	\$50931.00
Internet circuits – total circuits per district	\$0.00
Less E-Rate and CTF discounts	- \$0.00
Net circuit cost	\$0.00
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Total Consortium Costs	\$50931.00

* Enrollment count based on 22-23 CALPADS 1.17 report

* VPN count based on 22-23 invoice

* Hotspot count based on 22-23 invoice



**MOMENTUM
IN TEACHING**
TEACHING BEYOND THE BOOK

Proposal

Date: August 28, 2023
#726

To Alisa Haley
Santa Rosa City Schools
211 Ridgeway Ave.
Santa Rosa, CA 95401
(707) 890-3800

Salesperson	Job	Payment Terms	Due Date
Leslie Courtney	Professional Development	Due upon services rendered	Within 2 weeks after services

Date of Service	Description	Cost of Service	Line Total
1/17/24 1/18/24 1/23/24 1/24/24	Professional development to help support the CCSS through a Writing Workshop approach. Support will include, but not limited to, unpacking the Units of Study and curriculum mapping, how to plan for and conduct strategic writing conferences and small group instruction, as well as in classroom lesson study and demonstration days.	\$2,100/per 1 presenter 7 days	\$14,700.00
1/30/24 1/31/24 2/22/24	Contract amount total includes presenter fees and 11 days of travel (4 roundtrip flights, airport transport, luggage fees, hotel, rental car, gas, and food per diem).	11 travel days for 1 person	\$8,675.00

X <u>Leslie Courtney</u> Leslie Courtney, treasurer	X _____ Santa Rosa City Schools	Total	\$23,375.00
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STEDI.org
PO Box 3470
Logan, UT 84323-3470
+1 4357557800
info@STEDI.org
https://stedi.org/

Quote



ADDRESS
Santa Rosa City Schools 211 Ridgeway Ave Santa Rosa, CA 95401

SHIP TO
Santa Rosa City Schools 211 Ridgeway Ave Santa Rosa, CA 95401

QUOTE #	DATE	
Q1980	07/11/2023	

ACCOUNT REP.
Kelley Stone

ACTIVITY	QTY	RATE	AMOUNT
STEDI Skills Training Suite - ProSkills District Purchase of Training for ProSkills Level	2	8,750.00	17,500.00

Quote for 2 more years of Unlimited Annual Access (to begin 1/1/2024) for ProSkills Package which includes SubSkills Option A, Advanced Courses, Classroom Teacher Training, Specialists Training, Paraeducator Training, Teaching Online Course, Parenting Magic Course, Training Parents in Teaching Methods Course and Fill-Rate Course.

TOTAL **\$17,500.00**

Accepted By

Accepted Date

Contract DUE BACK BY:	Nov 7, 2023
CM Contract #	4983
Date of Contract:	Oct 25, 2023

**Fax back to
Community Matters
707-823-3373**

Client Will fulfill the following obligations:

- Ensure a school or district employee will provide supervision at all times when the CONSULTANT has contact with pupils.

- Return this contract by 11/7/2023 to guarantee CM's availability for the Service(s) on the above date(s). Otherwise, all prior agreements may be voided.

Payment for Services: Client agrees to pay CM, in US funds, the following fees for delivery of the services outlined above:

Total Price: \$7,200.00

Rescheduling or Cancellation:

Total Awards: -\$7,200.00

Once this contract is signed, if Client cancels or reschedules the service, Client will be held responsible for 50% of the regular price of the service. If Client cancels or reschedules within 2 weeks of the date of the service, Client will be held responsible for 100% of the regular price of the service.

Grant funded services: The Client, not the funder, will be held responsible for the above fees. The funder will be informed of any reschedule or cancellation requests. This could affect grant funding in subsequent years.

Grand Total: \$0.00

Upon receipt of signed contract or as specified herein, CM will invoice client for the items described above. Client agrees to pay such invoice(s) **in full upon receipt**.

Signatures

For Community Matters

LeeAnn Lichnovsky

LeeAnn Lichnovsky

Date: 10/25/2023

For Client

Signature: *[Signature]*

Date: 11-2-23

Name: *Ryan Parshke*

Title: *Principal*

Organization: Herbert Slater Middle School

Attachments

- CM Contract Terms
- Billing Information Sheet - please **complete** and **return** with this Contract
- Training Room Requirements - please give this to the person handling training logistics.
- Training Supplies, Equipment and Logistics - please give this to the person handling training logistics.
- Service Terms
- SSA TOT Participation Agreement
- Award Letter
- SSA Site License Agreement

Contract DUE BACK BY:	Nov 7, 2023
CM Contract #	4983
Date of Contract:	Oct 25, 2023

**Fax back to
Community Matters
707-823-3373**

**Contract
between**

Community Matters - A California Not For Profit Corporation

and Herbert Slater Middle School

P. O. Box 14816
 Santa Rosa, CA 95402
 PH: 707-823-6159 **FAX: 707-823-3373**
 Vendor ID #
 hereinafter referred to as "CM"

3500 Sonoma Ave.
 Santa Rosa CA 95405
 707-890-3880
 hereinafter referred to as "Client"

This Contract details the responsibilities of the above parties relative to the services listed below.

CM Will Deliver the services outlined below:

Service Code	Service Name and Description	Cost
SSAXM/H	Expansion Mid/High - Safe School Ambassadors Training & Support	\$7,200.00
	For: Herbert Slater Middle School Santa Rosa CA	
	On: December 6-7, 2023	
	Times: 2 full school days (6.5 hrs ea) PLUS 1 additional hour each day for adults	
	Deliverables: 1) Provide 2 days of on-site training for 35-40 NEW Safe School Ambassadors and 5 - 7 adults; on Day 2 schools may add up to 12 previously trained veteran Ambassadors and Program Adults. (1:6 adult to student ratio for each day) 2) Provide program materials for all training participants. Includes post training support for implementation of program. 3) Provide up to 2 hours of program implementation support by phone, web and email.	
	23 Sonoma County Office of Education (SCOE funded)	-\$7200.00
Service Subtotal:		\$0.00