



Golden Valley Charter Schools
Regular Meeting of the Board of Trustees
9601 Lake Natoma Dr.
Orangevale, CA 95662

November 12, 2025

Board Meeting Access Information

Date: Wednesday, November 12, 2025
Time: 5:00 p.m.
Primary Location: **Golden Valley River School, Room 5, 9601 Lake Natoma Dr., Orangevale, CA 95662**

Remote Location: Golden Valley Orchard, Room 2, 6550 Filbert Ave, Orangevale, CA 95662

Zoom Link: Topic: BOT Regular Meeting 2025.11.12
Time: November 12, 2025 05:00 PM Pacific Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/86105128413?pwd=8uVShhbpNxKOb6tOUGE9UNV9IXPB2.1>

Meeting ID: 861 0512 8413
Passcode: 388089

One tap mobile
+16699009128,,86105128413#,,, *388089# US

Join instructions

<https://us02web.zoom.us/join/86105128413/invitations?signature=IgtUJrkGwnCKGSUzNozOF8mouycQnc4QAgF1N4osg5Y>

This meeting is being conducted in person and will also be available to the public via teleconference through the Zoom platform.

Members of the public who wish to comment during the Board meeting may do so in person at the primary meeting location, a remote meeting location, or use the "raise hand" tool on the Zoom platform. Members of the public may also email their comments to the Board at bot@gvcharter.org; emailed comments will be summarized by the board chair. Individual comments are limited to three (3) minutes. The Board will limit the total time for public comment to fifteen minutes. The Board reserves the right to mute or remove a participant from the meeting if the participant unreasonably disrupts the Board meeting.

Disability Accommodations. A person with a disability may contact the central office at (916) 597-1477, or email the board at bot@gvcharter.org at least 48 hours before the scheduled board meeting to request receipt of an agenda and other distributed writings in an appropriate alternative format or to request disability-related modifications or accommodations, including auxiliary aids or services, in order to participate in the public board meeting.

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Regular Meeting Agenda

1. **Call to Order** – 5:00 p.m. *(K. Gerski-Keller)*
2. **Roll Call** – 5:00 p.m.
Board Members: Katie Gerski-Keller, Ekaterina Khmelniker, Stephen Quadro, Meredith Willsen, James Stark, Jessica Crew
3. **Board Member Exigencies and Remote Attendance** – 5:01 p.m. *(K. Gerski-Keller)*
Action: Shall the board approve any board members to participate in this board meeting from a remote location due to unexpected emergencies per AB 2449?
Information: Members must publicly disclose at the meeting before any action is taken, whether any other individuals 18 years of age or older are present in the room at the remote location with the member, and if so, the general nature of the member's relationship with any such individuals; and ensure their meeting participation using both visual and audio technology.
4. **Flag Salute/Quote/Moment of Silence** – 5:05 p.m. *(K. Gerski-Keller)*
5. **Public Comment** – 5:06 p.m.
This portion of the meeting is set aside for members of the audience to make public comments or raise issues that are not specifically on the agenda or for those that are on the agenda in areas of Board jurisdiction. Speakers are asked to keep comments respectful and focused on issues, not individuals. Please refrain from using names or identifying information when referencing students, staff, or families. Comments about specific individuals—especially students—should be addressed privately through the appropriate administrative channels. Disclosing confidential student information during a public meeting may violate federal privacy laws (FERPA). Additionally, members of the public are reminded that slanderous, defamatory, or disruptive comments may result in legal liability or removal from the meeting. The Board does not respond to public comment but may refer matters to administration for review. These presentations are limited to three (3) minutes and the total time allotted to non-agenda items will not exceed fifteen (15) minutes. The board will receive in person comments first, remote location comments second, and Zoom comments third.
6. **Consent Agenda** – 5:21 p.m. *(K. Gerski-Keller)*
All items listed on the Consent Agenda are considered by the Board to be routine and will be enacted by the Board in one motion. There will be no discussion on these items prior to the time the Board votes on the motion unless a member of the Board, staff, or public request specific items to be discussed and/or removed from the Consent Agenda. If items are pulled for discussion, a separate vote will occur on the item(s). The Executive Director recommends approval of all Consent Agenda items.
Action: Shall the Board approve the following items by consent?
 - 6.1 ***Shall the board approve an out of state field trip for the Orchard School 7th grade class to Ashland, Oregon the week of March 16th-20th 2026?***

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7. **Minutes Approval** – 5:22 p.m. *(K. Gerski-Keller)*
Action: Shall the Board approve the October 8, 2025, Regular Meeting Minutes?
8. **IT Service Vendor Quotes for GVCS** – 5:23 p.m. *(B. Galles)*
Discussion/Action: The Board will review and discuss quotes from three IT service vendors. Shall the Board approve one of the three vendor quotes to provide IT services for Golden Valley Charter Schools (GVCS)?
9. **Recharter Committee Meeting** – 5:45 p.m. *(K. Gerski-Keller)*
Discussion: The Board shall discuss holding a Recharter Committee meeting for Golden Valley Charter Schools (GVCS).
10. **Student Code of Conduct Policy (Second Read)** – 5:55 p.m. *(J. Hoover)*
Discussion: The Board will discuss the Student Code of Conduct Policy.
11. **Fiscal Oversight Updates for GVCS** – 6:10 p.m. *(J. Stark)*
Discussion: Members of the Finance Committee will present to the Board of Trustees an update on fiscal oversight for Golden Valley Charter Schools (GVCS).
12. **Faculty Reports** – 6:35 p.m.
Faculty Chair Report, Orchard: Orchard Faculty Chair, Jennifer Evans, will present items of interest to the board. *(J. Evans)*
Faculty Chair Report, River: River Faculty Chair, Tavia Pagan, will present items of interest to the board. *(T. Pagan)*
13. **Executive Reports** – 6:45 p.m.
Board Chair Report: Board of Trustees Chair, Katie Gerski-Keller, will present items of interest to the board.
Executive Director Report: Interim Executive Director, Jennifer Hoover, will present items of interest to the board.
14. **Recitation of the Motto of the Social Ethic** – 6:55 p.m.
The healing social life is found
When in the mirror of each human soul
The whole community finds its reflection,
And when, in the community,
The virtue of each one is living.
15. **Adjournment of the meeting** – 6:56 p.m. *(K. Gerski-Keller)*

October 8, 2025

Regular Meeting Minutes

1. **Chair Katie Gerski-Keller called the meeting to order at 5:01 p.m.**
2. **Roll Call –**
Board Members Present: Katie Gerski-Keller, Meredith Willsen, Ekaterina Khmelniker, James Stark, Jessica Crew
Board Members Absent: Stephen Quadro
Guests: Brittany Galles, Jennifer Hoover, Upekkha Evans (remote), Tavia Pagan, Mindy Kiel, Eileen Worthing, Briana D’Agostini
3. **Board Member Exigencies and Remote Attendance –**
Action: Shall the board approve any board members to participate in this board meeting from a remote location due to unexpected emergencies per AB 2449?
Information: Members must publicly disclose at the meeting before any action is taken, whether any other individuals 18 years of age or older are present in the room at the remote location with the member, and if so, the general nature of the member’s relationship with any such individuals; and ensure their meeting participation using both visual and audio technology.

TABLED. NO ACTION.
4. **James Stark read the Moderation Virtue Card.**
5. **Public Comment –**

There were no public comments.

Chair Katie Gerski-Keller closed public comment at 5:05 p.m.
6. **Minutes Approval –**
It was moved by Ekaterina Khmelniker and seconded by Meredith Willsen that the board approve the September 10, 2025, Regular Meeting Minutes.

(Ayes: 3, Noes: 0, Abstain: 2, K. Gerski-Keller and J. Stark)
7. **Minutes Approval –**
It was moved by Meredith Willsen and seconded by Ekaterina Khmelniker that the board approve the September 14, 2025, Special Meeting Minutes.

(Ayes: 5, Noes: 0, Abstain: 0)
8. **Executive Director Search for GVCS –**
The board would like to continue discussing an executive director search for Golden Valley Charter Schools (GVCS). The board explained different models of management seen at other charter schools including an executive director, a CMO, an EMO (Educational Management

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Office) as well as a principal at each site. The board continued to explain if GVCS were a bigger CMO, it would be beneficial to have a back-office provider managing finances.

Jennifer Hoover made a comment stating it is good practice to have an in-house representative for finances.

Meredith Willsen identified things to consider including the upcoming recharter year, having Jennifer Hoover in an interim role for years on end is not necessarily fair, and how the expenditure of an executive director search could impact with rechartering.

Eileen Worthing explained the importance of getting the word out sooner than later for finding prospective candidates. The longer timeframe the job is posted, the better. Human Resources would prefer at least two months to recruit, resulting in about a three-month time frame all together. The ideal time to find someone that's in search of the new contract would be around January or February. Eileen suggested possibly holding interviews at the end of February.

When conducting the executive director search, the board would like to use GVCS human resources for utilizing internal resources. They specifically would like assistance for considering aspects such as benefits, contracts, and interview questions.

Eileen explained that even though there are a lot of nuances, a search like this has been done before and is achievable. This will be the first executive director search GVCS has done in ten years.

It was moved by Meredith Willsen and seconded by James Stark that the board approve to conduct an executive director search for the 2026-2027 school year for Golden Valley Charter School internally by using Golden Valley Charter School's in house Human Resources.

(Ayes: 5, Noes: 0, Abstain: 0)

9. **Recharter Committee for GVCS –**

The Board discussed establishing a recharter committee for Golden Valley Charter Schools (GVCS) and gave some examples of what serving on the committee would entail. The overall goal of the committee is to build more parent support. Examples could include writing letters, attending San Juan board meetings, and participating in other areas where GVCS needs more support. The committee would be held by the Board of Trustees but would focus on making an effort to include more educational partners to be engaged.

To comply with the Brown Act, it was noted that no more than two GVCS board members shall attend a San Juan board meeting.

Katie Gerski-Keller stated Jennifer Hoover, Marlene Laughter and Parent Circle (PC) members would be ideal personnel to conduct the recruiting of recharter committee members. Katie is also meeting with GVEF and will check in to see if they would like to have any involvement in the committee as well.

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It was moved by Ekaterina Khmelniker and seconded by James Stark that the Board approve to establish a recharter committee for Golden Valley Charter Schools (GVCS).

(Ayes: 5, Noes: 0, Abstain: 0)

10. Student Code of Conduct Policy –

This will be the first read of the Student Code of Conduct Policy. This policy will be brought back to the board at the November regular meeting for a second read, and again at the December regular meeting for the final read.

Jennifer Hoover explained main areas of the policy revision include bringing it up to date with the correct Education Code, suspension policy specifics, and implementing more points of intervention. Within the policy, there was also added language for referrals and record retention in accordance with FERPA and the California Education Code requirements.

The board stated they would like a two-step verification process for contacting or notifying parents regarding suspensions and expulsions. It was proposed that ParentSquare could be a consideration and a helpful option due to the fact of being able to see when a notification is read and received.

Meredith Willsen would like items #4 and #6 under expulsion to be clarified for steps as part of the narrative.

Jennifer Hoover clarified that the suspension and expulsion policy was approved last year and was a template from Charter Schools Development Center (CSDC). The board would like copies of both the Suspension and Expulsion Policy and the Bullying Policy to reference at the next regular meeting.

Because this is the first read of the revised Student Code of Conduct Policy, this item was discussed only.

TABELED. NO ACTION.

11. Policy Committee for GVCS –

Katie explained governance policies were integrated into GVCS's bylaws, but because of the rechartering, some of those policies need to be pulled out and placed into specific board governance policies such as code of conduct of a board member and norms, conflict of interest, policies surrounding gifts, annual organization meetings, procedure for policy adoption, code of ethics, uniform complaint procedures, etc.

It was moved by Meredith Willsen and seconded by Ekaterina Khmelniker that the board approve Jessica Crew as a member from the Board of Trustees to the Policy Committee to update agency-wide policies for Golden Valley Charter Schools(GVCS).

(Ayes: 4, Noes: 0, Abstain: 1, J. Crew)

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It was moved by Ekaterina Khmelniker and seconded by James Stark that the board approve Meredith Willsen as a member from the Board of Trustees to the Policy Committee to update agency-wide policies for Golden Valley Charter Schools(GVCS).

(Ayes: 4, Noes: 0, Abstain: 1, M. Willsen)

It was moved by Meredith Willsen and seconded by Ekaterina Khmelniker that the board approve Katie Gerski-Keller as a member from the Board of Trustees to the Policy Committee to update agency-wide policies for Golden Valley Charter Schools(GVCS).

(Ayes: 4, Noes: 0, Abstain: 1, K. Gerski-Keller)

12. Fiscal Oversight Updates for GVCS –

James Stark presented updates on fiscal oversight for Golden Valley Charter Schools(GVCS). He explained that the Finance Committee has recognized in some of their first meetings that the budget for 2025-2026 is not accurate to the level of quality they want and that the numbers did not make sense. Since then, there has been progress made in the revenue aspect, and they will continue to review the actuals. At this time, the committee is focused on the first interim budget because that needs to be turned in to San Juan Unified School District in December.

13. Updated Specialist Positions –

Eileen Worthing explained to the board that at the previous meeting approval of the updated specialist positions, factoring in all the breaks for the non-exempt positions that specialists were moving over to was not accounted for. When calculating all the breaks, the Range 10 that was originally approved was not sufficient for the current specialists. Eileen explained that at the last meeting she acknowledged she would not be lowering anyone's salary. Therefore, she is proposing to move Specialist I for Range 11, Specialist II for Range 12 and Specialist III for Range 13. Eileen is updating the job description and focusing on qualifications for the specialist: Specialist I having 1-3 years of experience, Specialist II having 3-5 years of experience, and Specialist III having 5 years or more of experience. Range 11 would start at \$28.00 and end at \$38.76 per hour; Range 12 would start at step 1 \$25.00 to step 12 \$40.14 per hour; Range 13 would start at \$30.00 and end at \$41.50 per hour.

It was moved by James Stark and seconded by Jessica Crew that the Board approve the updated Specialist positions to Specialist I, Specialist II, and Specialist III to coordinate with the exempt salaries of current Specialists when moving to non-exempt schedule at 180 days of work.

(Ayes: 5, Noes: 0, Abstain: 0)

14. Retro-Salary Schedule –

Eileen explained to the board that the GVCS salary schedule was not updated last year. In preparation for 2026 minimum wage laws, Eileen discovered 2025's salary schedule should have been updated in 2024. Eileen explained for 2025 this does not affect many employees, however leading into 2026, this will effect employees because the 2026 minimum wage is going to be \$58,933 for a 10-month employee.

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Jennifer clarified with Eileen that by law, if you're exempt, you must make double the minimum wage. In 2026, when that 10-month salary is going to be at minimum \$58,933, that is very close to the salary calculator for GVCS employees with a clear credential at Step 2, which is \$59,000. Eileen explained due to this, GVCS will have to adopt increase in Step 1 as well as increase in Step 2 to make it fair. The cost implications for 2026 alone are estimated at \$109,800 in salary adjustments, and that does not include the additional impacts of employer-paid contributions. Eileen had reached out to CSMC and will update the board as soon as she gets a response regarding how the employer contributions are going to affect. James would like those numbers brought to the next Finance Committee meeting to comprehend those into GVCS spending.

*See attachment in the board packet for the faculty salary difference for the 2026 year.

It was moved by Ekaterina Khmelniker and seconded by Meredith Willsen that the board approve the retro-salary schedule (exempt) change for 2025 and upcoming salary schedule (exempt) for 2026 to coordinate with minimum wage laws.

(Ayes: 5, Noes: 0, Abstain: 0)

15. Faculty Reports –

Faculty Chair Report, Orchard: Orchard Faculty Chair, Jennifer Evans, presented items of interest to the board.

Faculty Chair Report, River: River Faculty Chair, Tavia Pagan, presented items of interest to the board.

16. Executive Reports –

Board Chair Report: Board of Trustees Chair, Katie Gerski-Keller, presented items of interest to the board.

Executive Director Report: Interim Executive Director, Jennifer Hoover, presented items of interest to the board.

17. The Board recited the Motto of the Social Ethic.

18. Chair Katie Gerski-Keller adjourned the meeting at 6:47 p.m.

Respectfully submitted by Brittany Galles.

Katie Gerski-Keller, Chair

Date



Managed IT Services Addendum

This Datacate Managed IT Services Addendum (this “**Addendum**”) is made by and between Datacate Inc., a California corporation (“**Datacate**”, “**we**” or “**us**”), and Customer executing this Addendum (“**Customer**”). This Addendum is incorporated by reference into (i) that certain Datacate Master Services Agreement (the “**Master Agreement**”) and (ii) any Service Order (“**Service Order**”, “**Order**”), each as entered into from time to time between Datacate and Customer. This Addendum shall be effective upon execution by the Customer and acceptance by Datacate. Capitalized terms in this Addendum are defined in this Addendum, the Master Agreement, or one or more Orders applicable to the managed IT services described herein.

1. Covered IT Assets and Customer Locations

For purposes of this Addendum, the covered IT Assets are as outlined in the Order, and all Locations are as outlined in Schedule 3.

If the Customer wishes to relocate, add, or remove any Locations covered under the Services, the Customer must provide written notice to Datacate at least sixty (60) days in advance. All such changes are subject to review and acceptance by Datacate. If accepted, a revised Service Order will be required to document the updated scope of service. Datacate reserves the right to renegotiate service terms or decline support for any new or relocated Locations that do not meet service criteria.

Adjustments to the IT Assets covered under this Addendum will require a revised Service Order, unless otherwise specified in supplemental or additional terms. At Datacate’s discretion, new IT Assets may be added to coverage, and the associated cost of services will be reflected in the Customer’s monthly charges, initially prorated on the first invoice issued following the addition.

Any IT Assets added or removed without the written consent or acknowledgment of Datacate will be subject to review and acceptance by Datacate. Datacate reserves the right to decline coverage or adjust service terms for any such additions at its sole discretion.

1.1. Conditions for Service. Customer IT Assets are eligible for service, monitoring, and support under this Addendum provided they are in good working condition, and Datacate’s Serviceability requirements/standards as defined and Worksite environmental conditions as set forth herein are met.

1.1.1. Minimum Standards Required for Services. In order for Customer’s environment to qualify for Datacate’s Managed Services, the following requirements must be met, either by existing condition, or optionally furnished by Datacate as part of the Included Services per Section 1.2, in which case the associated Service Order(s) may be amended to reflect the additional Services to be provided:

- All server and desktop software must be genuine, properly licensed, vendor-supported, and running the latest service packs and critical updates. In cases where software does not meet these requirements, Datacate will make its best effort to provide support; however, standard service levels and response time commitments



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(SLAs) will not apply. Datacate reserves the right to reschedule service or decline support for systems running unsupported, unlicensed, or outdated software.

- The environment must have a currently licensed, up-to-date, and vendor-supported centrally-managed antivirus solution protecting all servers, desktops, notebooks/laptops, and email. As part of its Helpdesk service, Datacate furnishes its standard endpoint security solution for all workstations to ensure a consistent and secure operating environment. An alternative endpoint security solution may be provided by the Customer, subject to review and acceptance by Datacate. The Customer acknowledges that Datacate's acceptance and ongoing support of any Customer-provided solution is at Datacate's sole discretion and may incur additional monthly fees.
- The environment must have a currently licensed, vendor-supported server-based backup solution that is capable of being monitored by Datacate and configured to send job success and failure notifications to Datacate's designated recipient email address(es). Datacate offers a fully managed server backup solution as an optional service add-on. The Customer may alternatively furnish their own backup solution, provided it meets Datacate's operational and security requirements and is subject to review and acceptance by Datacate. Datacate reserves the right to assess additional fees for monitoring and support of Customer-provided backup solutions.
- The environment must include a currently licensed, vendor-supported hardware firewall positioned between the internal network and the Internet. Datacate can furnish a supported firewall solution as an optional service add-on. Alternatively, the Customer may provide their own firewall hardware, subject to review and acceptance by Datacate at its sole discretion. Additional charges may apply for the configuration, monitoring, or support of Customer-supplied firewall devices.
- All wireless data traffic in the environment must be securely encrypted. Datacate can furnish a compliant wireless solution as an optional service add-on. Alternatively, the Customer may provide their own wireless equipment, subject to review and acceptance by Datacate at its sole discretion. Additional charges may apply for the configuration, monitoring, or support of Customer-supplied wireless devices. If Customer-supplied equipment is not capable of meeting security requirements, Datacate reserves the right to de-schedule support for the network until compliant equipment is implemented.
- There must be an outside static IP address assigned to a network device, allowing VPN access. A public static IP address is required at any location where inbound VPN connectivity or redundant Internet connections will be implemented or supported by Datacate. The static IP must be assigned to a network device under Datacate's management to enable proper configuration and remote access.
- Datacate strongly recommends that all workstations be no more than five (5) years old, and that servers, storage devices, and networking equipment be no more than seven (7) years old. It is also recommended that the Customer maintain active manufacturer warranties on all devices covered under the Service. In cases where Customer equipment exceeds these recommended age thresholds, Datacate will make its best effort to provide support; however, standard service levels and response time commitments will not apply to such devices. Additionally, Datacate reserves the right to de-schedule any device that exceeds the stated age limits or has reached manufacturer end-of-life status.



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- Datacate reserves the right to inspect the IT Environment upon the commencement of the term of this Addendum to assess and document the state of the IT Environment.

Datacate reserves the right to suspend or terminate this Addendum if, in its sole discretion, conditions at the service Worksite pose a health or safety threat to any Datacate representative.

Coverage for existing Customer IT Assets under this Addendum is contingent upon:

- The IT Assets meet Datacate's Serviceability standards set forth in Section 1.1.1.
- Datacate's RMM agent installed and be remotely accessible over a reliable internet connection (applicable to Workstations and Servers).
- The IT Asset's physical condition, physical configuration, and/or digital configuration are supported by the manufacturer or vendor.
- The IT Asset's physical condition, physical configuration, and/or digital configuration remains economically reasonable for service.
- The covered IT Assets are at a covered and serviceable location listed in Schedule 3 (applicable when on-site service is rendered).

1.2 Included Services. The services covered by this Addendum and provided by Datacate are itemized in the Order and subject to the Scope of Work and Service Levels set forth in Schedules 1-3 of this Addendum. Any services not set forth therein will be considered uncovered and are subject to the Out of Scope/uncovered terms, fees, and conditions.

1.3 Included Service Hours and Days. All services covered by this Addendum and provided by Datacate per the Order are furnished in accordance with Schedule 1. Services provided outside of these definitions are at the discretion of Datacate. These services are contingent upon Datacate's availability of its representatives, as set forth in the terms and conditions of this Addendum. Service requests outside of this matrix are considered Out of Scope.

1.4 On-site Services. Datacate strives to resolve support requests via remote services because they are less invasive to the End User, have faster turnaround times, and help Datacate control costs. Datacate will offer On-Site service when:

- Physical movement or in-person configuration of IT Asset(s) is necessary and cannot be reasonably performed by the Customer
- Remote accessibility is limited or not reliable
- Datacate's representative believes on-site service is necessary or will provide the fastest resolution

It is at the sole discretion of Datacate to determine if an on-site dispatch of a Datacate's representative is necessary to resolve a monitor alert, service or support request. Datacate reserves the right to refuse requests for on-site service when the incident can be resolved via remote support within a reasonable time and minimal Customer involvement. Customer Worksite(s) for on-site service will conform to the definition of Worksite as per Section 4.



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Customer has the right to refuse On-site services, even those Datacate determines are required to address a Customer support/service request or monitor alert. In the event Customer refuses On-Site services that are determined to be necessary by Datacate, Customer agrees that service levels and performance commitments stipulated in this Addendum will no longer apply.

1.5 General Coverage Exclusions. Services rendered under this Addendum do include any labor, services, consulting, products, licenses, costs, or fees unless explicitly specified herein and in the Order. Any such requests or services are deemed Projects as defined in Schedule 2 of this Addendum. Customer approval is required for any uncovered services or incidents where associated charges exceed 10% of the Customer's base monthly service fees, unless otherwise stated in this Addendum.

1.6 Included Service Levels. General Service levels, priority, and hours of coverage are set forth in Schedule 1 of this Addendum. The following conditions and behaviors apply to the service level response/resolution time timers:

- The response and resolution time timers begin to track time when the ticket is created within Datacate's ticketing system.
- Opening tickets with the Customer portal is the preferred and immediate method of submitting requests. Emails sent to Datacate's designated support email address are not guaranteed to generate a support ticket immediately, but typically result in ticket creation within five (5) minutes of receipt. Datacate is not responsible for delays in ticket creation caused by network congestion, Internet service outages, email server or software issues, or other factors beyond Datacate's control.
- Ticket response and resolution timers are paused when progress on a Customer request is dependent on action from the Customer or a third party (e.g., vendor or manufacturer). Timers will remain paused until responsibility for the next step shifts back to Datacate. During this time, Datacate will continue to follow up with and escalate the request as needed to the appropriate party in order to facilitate resolution.
- Ticket response and resolution timers will be paused outside the covered hours set forth in Schedule 1.

1.7 General Service Level Exceptions. Exceptions to the service levels provided as part of this Addendum will apply, including but not limited to the following situations:

- Datacate furnishes remote support to an End User who is not the Customer's designated technical contact and lacks the necessary technical aptitude to work efficiently with Datacate's technician.
- Service and support requests that require interaction with a third party.
- Customer is within the earlier of a) their first ninety (90) days of Service, or b) the Customer onboarding period.
- Uncovered, Out of Scope, after-hours, overnight, observed holiday(s), and excluded services as set forth within this Addendum.

2. Service Process

2.1 Requesting Support. Customer End Users can submit tickets via email, by phone, or using Datacate's customer portal. Ticket support tiers are detailed in Schedule 1.3.



2.2 Service Onboarding Process. Datacate will begin to enable and provision the services set forth within this Addendum upon execution of this Addendum. This process is referred to as '**Onboarding**' and is defined further in Section 4. This process takes place over the first 45-90 days of a service relationship governed by this Addendum.

The steps Datacate will take to complete Service Onboarding include, but are not limited to:

- Addition of Customer details to Datacate's ticketing tools and remote monitoring and management tools.
- Knowledge and credentials transfer from the existing IT Service Provider or internal IT employees to Datacate.
- Deployment of Datacate's remote monitoring and management technology to Customer's IT Assets as well as removal or request for removal of the former provider's monitoring and management technologies, if any.
- Assessment and Documentation of Customer's business, needs, pain points, and technology.
- Documentation of Customer's IT Assets, technology use case(s), technology needs, and pain points.
- Configuration of Datacate's tools to meet the contractual obligations set forth within this Addendum.
- Establishment of Customer maintenance windows, key contacts, reporting requirements, and communication requirements.
- Scheduling of recurring meetings for Datacate to provide updates and receive feedback from the Customer.
- Training of Datacate's team on Customer's environment and business.
- Training of Customer's End Users on Service commitments and how to successfully work with Datacate.
- Development of a project plan to implement best practices and current standards for security and serviceability in Customer's IT Environment, where applicable.
 - Initiation of work on Customer-approved proposals for the same.
- Adjustment or definition of Standard Operating Procedures for IT to integrate Service(s) provided by Datacate.
- Continue work with Customer to alleviate any known or discovered pain points within Customer's IT Assets or IT Environment as necessary.

The Onboarding period concludes when substantially all scheduled IT assets are under Datacate's control and management or sixty (60) days have elapsed since service commencement, whichever occurs first.

3. Service & Support Responsibilities.

Customer will use the appropriate means of contact to request service and report issues as set forth in Section 2.

- Customer's End Users will not attempt to contact Datacate's service/support representatives via personal or individual cell phone numbers, direct Datacate corporate email addresses, or personal email addresses.
- Customer will provide all pertinent information required to open a service/support request, including but not limited to: screenshots, the full text of any error messages, copies of relevant documents such as email messages or written instructions, and any other details necessary to understand, reproduce, or resolve the issue..



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- When opening a service/support request Customer will work with Datacate to accurately classify the request's impact and severity so that its priority and SLA requirements can be accurately applied.
- Once a request for service/support has been successfully submitted, Customer will provide reasonable availability of its representative(s) to cooperate with Datacate's service/support representative(s) assigned to the request.
 - Datacate's service/support representatives will make their best effort to resolve Customer support incidents with minimal involvement from the customer's end users and minimal disruption to End-User workflows. However, the Customer acknowledges that End User participation and temporary interruption of End User work may be necessary to fully diagnose and resolve certain issues.
- Customer shall grant Datacate access and usage rights to all relevant IT Environments and IT Assets as reasonably required by Datacate to provide its services and support.
- In the event that Datacate requires the decision, approval, consent, authorization, or any other communication from Customer in order to provide any of the services (or any part thereof) described herein, Customer will be reasonably diligent in providing the same in a timely manner.
 - Datacate is not liable or at fault for any impact(s) caused by a delay in any requested approval from the Customer. This includes, but is not limited to, impacts on the availability or performance of Customer's IT Assets and/or related services.
- The Customer will promptly notify Datacate of any events or incidents that could impact the availability, functioning, or performance of services set forth in this Addendum and/or any supplemental service needs.
- Customer agrees not to permit any changes or modifications to be made to the covered IT Assets by any party other than those authorized by Datacate.
 - Customer agrees to inform Datacate of any modification, installation, or service performed on the covered IT Assets listed in Schedule 2 by individuals not employed by Datacate (whether authorized or unauthorized).
- Where feasible and with reasonable effort, the Customer will provide all necessary, pertinent, accurate, and complete information, documentation, and knowledge that Datacate needs to successfully provision and provide the services detailed in this Addendum in advance of the initiation of such services. This includes:
 - Any and all documentation associated with the covered IT Asset(s);
 - Any and all software installation media and licenses for covered software and applications
- Customer herein agrees to cooperate with Datacate to define, establish, and adhere to all required Maintenance Windows.
 - Customer approval is not required or sought during defined Maintenance Windows, unless explicitly indicated otherwise, and this condition may result in increased monthly contractual costs.
- The Customer agrees to designate key representative(s) within their business as specified in Schedule 3 of this Addendum, and that such representative(s) agree to cooperate with Datacate to provide supplementary support to the Customer. The supplementary support may include, but is not limited to:



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- Approval for estimates or charges for Out of Scope products, project work, and other services as quoted by Datacate.
- Approval for emergency maintenance.
- Reasonable “hands-on” co-operation with Datacate’s service/support representative when diagnosing and addressing service requests and other issues.
 - The designated On-Site technical contact will work with Datacate on critical issues for as long as necessary. While Datacate strives to be minimally disruptive in its execution of Services, On-Site, hands-on involvement of the identified On-Site technical contact will occasionally be required.
- Communications regarding open issue status, extended outages, or other technical matters.
- Scheduling and updates for project and support services.
- Communications regarding critical issues occurring after hours, approving after-hours service or service escalations, or deferring service until regular Business Hours.
- Customer will cooperate with Datacate during Onboarding and on a periodic basis thereafter to evaluate backups, disaster recovery strategies, and business continuity plans.
- Customer will cooperate with Datacate throughout Onboarding and on an annual basis thereafter to review:
 - The services furnished by Datacate over the previous year.
 - The direction of Customer’s business to ensure that IT retains alignment.
 - If additional services and/or products are necessary to meet Customer’s business and IT needs.
 - The state, status, and health of Customer’s IT Asset(s).
 - The continued integrity, completeness, and validity of this Addendum.

4. Definitions

Certain capitalized terms are defined in this Section 4 as set forth below.

“Basic” refers to the Basic SLA level for Customers who may already have Tier 1 support on staff and require additional support to augment their existing IT resources. Basic contains Tier 2 and 3 support and coverage during normal Business Hours.

“Business Hours” means the business hours as set forth in the applicable schedule attached hereto.

“End User” means an individual Customer permits or invites to receive services under this Addendum. For the avoidance of doubt: (a) individuals invited by Customer’s End Users, (b) individuals interacting with Customer’s customer(s) are also considered End Users.



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"Helpdesk" refers to the Helpdesk SLA level for Customers who do not have their own IT resources and need Datacate to provide all IT support. Helpdesk level provides Tier 1, 2 and 3 support during normal Business Hours, and level 1 support at all other defined times. On-site support services are also included at this level.

"IT Assets" refers to any technical resource, generally within a Customer's environment, and includes both physical and digital resources. This includes but is not limited to workstations, servers, Network Devices, software, applications, licenses, cloud subscriptions, and any other peripheral devices that are technical in nature.

"IT Environment" refers to the collection of IT Assets and their complete configuration at a Customer's location/Worksite. This includes but is not limited to all IT Assets, Customer's network, Customer's Windows Domain, Customer's software installations, Customer's hardware configurations, IT strategies, IT plans, and/or IT processes.

"Locations" means the physical Locations in which Customer operates and at which Datacate is expected to provide services.

"Maintenance Window" is a predefined period during which Datacate may perform scheduled maintenance, updates, patches, or other service-affecting activities on Customer's IT Assets or IT Environment. Maintenance Windows are established in coordination with the customer to minimize disruptions to business operations. Activities performed during an agreed-upon Maintenance Window are considered authorized and are not subject to service level credits for downtime, unless otherwise specified in this Agreement.

"Managed Services" refers to the ongoing, proactive management, monitoring, and support of Customer's IT Assets by Datacate, including, but not limited to, remote and on-site technical support, systems administration, cybersecurity protections, software updates and patching, performance monitoring, endpoint management, backup and disaster recovery services, and strategic IT consulting, as defined in the applicable Service Order and Scope of Work (SOW), with the goal of maintaining optimal system performance, availability, and security while minimizing unplanned downtime and IT-related disruptions.

"Monitors" are the IT resources Datacate uses to discover and receive alerts about a Customer's IT Environment and IT Assets. They detect and alert on issues detected, warnings, errors, and when thresholds for known issues are exceeded.

"Network Devices" refer to IT Assets that include, but are not limited to, firewalls, switches, routers, gateways, network cables, hubs, wireless gateways, and wireless access points.

"On-Site" means Datacate will occasionally need to send its representatives On-Site to address service/support requests. On-Site refers to when a Datacate representative is providing services at Customer's Worksite/location.

"Onboarding" means the process and period in which Datacate is establishing its services within a Customer's IT Environment(s). This is usually a 45-90 day period that includes several steps to ensure the successful and effective implementation of Datacate's services.

"Order" means Datacate's applicable order forms. As applicable, the Order will identify: (i) the SLA type, (ii) the number of End Users, (iii) the number of requests, or hours included, and (iv) the amount or rate you will be charged, and the billing and renewal terms. Orders may also include Additional Services.



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“Out of Scope” refers to any and all services, support requests, charges, costs, fees, products, licenses, and other coverages that do not fall under the scope of this Addendum. Out of Scope implies that additional charges, fees, or expenses will be necessary.

“Premium” refers to the Premium SLA level for Customers who want to have the highest priority support. At this level, Datacate will treat Customer’s support issues as if they were our own. Premium level provides Tier 1, 2, and 3 support during Business and Extended Hours, and provides Tier 1 and 2 at all other times.

“RMM” means Remote Monitoring and Management technology which allows Datacate to access Workstations and servers remotely.

“Service Level Agreement (SLA)” refers to the service commitment between Datacate and Customer.

“Serviceability” refers to the health and state of an IT Asset or location. Serviceability refers to the ability of Datacate to cover a given IT Asset. In most scenarios, when Serviceability standards and conditions cannot be met, any and all services involving those assets will be treated as Out of Scope.

“Standard Operating Procedures (SOPs)” are documented, repeatable processes established by Datacate for the consistent delivery of its services. SOPs define the methods, responsibilities, and workflows for routine tasks, including but not limited to support request handling, system monitoring, maintenance operations, incident response, and change management.

“Virtual Private Network (VPN)” a secure communication technology that creates an encrypted connection over a public or shared network, allowing remote users or sites to securely access an internal network as if directly connected.

“Worksite” means a building or group of buildings located which are adjacent or separated only by a private or public roadway or other private or public right-of-way, and which are owned and operated by the same entity or by entities under common control.

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5. Acceptance

This Addendum covers only the Locations, IT Assets, services, On-Site services, service hours, and covered days defined within this Addendum. The addition of Locations, IT Assets, services, On-Site services, service hours, and covered days not outlined in Schedules 1-3 at the signing of this Addendum, if acceptable to Datacate, shall result in an adjustment to Customer's monthly charges.

IN WITNESS WHEREOF, Customer has caused this Addendum to be signed by Customer's duly authorized representative as of the date set forth below.

Datacate, Inc

Provider

Signature

Name

Title

Date

Golden Valley Charter Schools

Customer

Signature

Name

Title

Date

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Schedule 1 - Expanded Definitions

1.1. Service Level Matrix

	Device-only (NOC)	Helpdesk	Premium
Support Tiers Available			
Business Hours	2,3	1,2,3	1,2,3
Extended Hours	n/a	1	1,2,3
Nights	n/a	1	1,2*
Weekends	n/a	1	1,2*
Holidays	n/a	1	1,2*
Support 1st Response Target (business hours)			
Severity 1	8	4	2
Severity 2	4	4	2
Severity 3	4	2	1
Severity 4	2	<1	<1
Support Resolution Target (business days)			
Severity 1	3	2	<1
Severity 2	3	1	<1
Severity 3	2	<1	<1
Severity 4	1	<1	<1
On-Site Services Targets**			
Business Hours	n/a	8x5	On Demand
Extended Hours	n/a	Available	On Demand
Nights	n/a	Available	Available
Weekends	n/a	Available	Available
Holidays	n/a	By Appt.	Available
*Tier 3 escalation path included for Severity 4 issues			
**All On-site Service Targets are based on Severity, and provided on an "as-needed" basis			

1.2. Time Definitions

Definition	Days	Hours	Time Zone
Business Hours	Monday - Friday	0800 - 1700	PST
Extended Hours	Monday - Friday	1701 - 2359	PST
Nights	Monday - Friday	000 - 0759	PST
Weekends	Saturday - Sunday	000 - 2359	PST
Holidays	Federally Recognized	000 - 2359	PST

1.2.1 Human Resource Definitions

Definition	Business Hours	Extended Hours	Nights Hours	Weekends Hours	Holidays Hours
1x Resource	40/week, tier 1-3				
2x Resource	40/week, tier 1-3	10/week, tier 1,2*	10/week, tier 1,2*	5/month, tier 1,2*	2/month, tier 1,2*
3x Resource	60/week, tier 1-3	10/week, tier 1,2*	10/week, tier 1,2*	10/month, tier 1,2*	5/month, tier 1,2*

1.3. Support Tiers

Definition	Description	Typical Exp.
Tier 1 (Helpdesk)	Desktop and Software issues that can be resolved over the phone or through a remote connection such as basic End User support. Tier 1 issues should be resolved within a few hours. If no solution is available, or the request is beyond the capabilities of Tier 1, then Tier 1 personnel will escalate incidents to a higher Tier.	2-5 Years
Tier 2 (System Admin)	System administrative issues, such as server issues that affect multiple users, updates to server software, group policy configuration, Active Directory management, email management, and software interoperability. Tier 2 is responsible for resolving problems that cannot be handled by Tier 1. If no solution is available, Tier 2 personnel escalate incidents to Tier 3.	6-15 Years
Tier 3 (Engineering)	System engineering issues such as new capacity planning and implementation, installing and testing network hardware and software. Tier 3 supports remote access systems architecture, network core, location networks, wide-area connectivity, and disaster recovery plan development. Tier 3 is the resolution of incidents not resolvable by lower Tiers.	15+ Years

1.4. Support Severity Levels

	Severity 1 Low	Severity 2 Medium	Severity 3 High	Severity 4 Critical
Business/Financial Risk	No exposure of information to the internet, Productivity loss is minor. Minimal to no business impact.	Moderate exposure. Some processes are unavailable but the majority of functions are still available and a workaround is available.	Systems have a critical failure. Malware present on the network. Most productivity has stopped	Catastrophic hardware failure or systems have been compromised by a bad actor. All productivity has stopped.
Impact	Minor	Some; multiple users affected	Significant, few can work	Full, All work has stopped
Users Affected	0 – 15%	15 – 30%	30 – 75%	75 – 100%
Workaround	Acceptable	Acceptable	Not Preferable	Not Acceptable
General Description	Minor problem or question that does not affect the software function such as How To's, documentation, general questions, or enhancement requests. Severity Level 4 problems could have the following characteristics: General requests for advice on asset usage, clarification on documentation, request for additional services or assets.	Asset features are unavailable but a workaround exists and the majority of software functions are still usable. Minor function/feature failure that Customer can easily circumvent or avoid. Customer's work has minor loss of operational functionality. Severity 2 problems could have the following characteristics: Error message with workaround, minimal performance degradation, incorrect asset behavior with minor impact, questions on asset functionality or configuration during implementation.	Important asset features are unavailable with no acceptable workaround. Customer's assets in a primary business service, major applications or mission-critical systems are functioning with limited capabilities or are unstable with periodic interruptions. The software may be operating but is severely restricted. Severity 3 problems could have the following characteristics: Asset error or failure forcing a restart or recovery, severely degraded performance functionality unavailable but the system is able to operate in a restricted fashion.	Customer's use of an asset on a primary business service, major application or mission-critical system is stopped or so severely impacted that Customer cannot reasonably continue work. Severity 4 problems could have the following characteristics: System hangs or crash situations, data loss or data corruption, critical functionality not available



Schedule 2: Scope of Work

The following sections provide a general scope and definition of the Services that may be rendered by Datacate under this Addendum. These descriptions are intended as a guide to the types of services typically included within Datacate's Managed Services. Depending on the specific Services ordered by the Customer, not all items listed herein may be applicable. Likewise, this scope is not exhaustive; additional tasks or responsibilities may be included or excluded based on the terms of the Customer's Service Order and the provisions of this Addendum.

Datacate will perform all Services in accordance with industry best practices and in alignment with the Customer's operational requirements, to the extent reasonably possible within the scope of the Services defined. The Services will be made available to Customer per Schedule 1 of this Addendum.

2.1. MSP Helpdesk User and Device Support

Helpdesk Support

Datacate maintains a staffed IT Helpdesk that provides support for all end users covered under this agreement. All Helpdesk support and incident remediation—regardless of time to resolution—are included in the base Services, provided the nature of the work does not qualify as "Out of Scope" as defined in this Addendum. Datacate does not bill separately for extended troubleshooting or time-intensive tickets that fall within scope. Typical support tasks include, but are not limited to:

- User account administration
- Email and connectivity troubleshooting
- Peripheral support
- Software installation and updates
- Guidance on common application usage

User Onboarding and Offboarding Services

Datacate will perform user onboarding and offboarding services on demand when Customer experiences End User staffing changes. These services include the provisioning and deprovisioning of user accounts; setup or removal of access to business systems, email, and productivity tools; and the secure handling, transfer, or removal of user data and company-assigned devices during personnel transitions. All onboarding and offboarding activities will be conducted in accordance with customer direction and applicable policies.

Data Management and Security

Datacate will advise on and configure data storage and handling practices for end-user systems to ensure alignment with the Customer's internal policies and recognized industry best practices for data protection and security. This includes identifying appropriate storage locations for critical data, minimizing the risk of data loss during system maintenance, and promoting secure and compliant data usage across supported devices. End users will be informed of recommended storage locations and proper file management procedures.



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Workstation Configuration Consulting

Datacate will advise the Customer on best practices for configuring workstations, including local admin rights, data storage policies, and OS selection. Datacate will implement mutually agreed-upon configurations to support secure, efficient, and standardized work environments.

2.2. Server Sysadmin and Workstation Management and Maintenance

Server Sysadmin

Datacate will maintain Windows Server operating systems and related services as applicable, including DNS, DHCP, file and print services, and system performance monitoring. Where present in the Customer's IT Ecosystem, Datacate will manage Active Directory, including user accounts and permissions, and administer Group Policy Objects (GPOs) to enforce system policies. Datacate will perform troubleshooting of service disruptions or system errors. Datacate will also implement system hardening best practices and monitor system resources to optimize performance and capacity planning, ensuring alignment with security standards and organizational requirements.

System Maintenance and Patch Management

Datacate will perform scheduled maintenance and patch management for all covered workstations and servers. This includes the application of operating system updates, performance checks, and routine system reboots to support system reliability, security, and overall performance. Updates and maintenance tasks will be configured to run during defined Maintenance Windows. Datacate will coordinate with the Customer to establish and maintain appropriate Maintenance Windows that minimize disruption to business operations.

Some updates may require temporary unavailability of systems due to reboots or installation processes. Datacate will provide advanced notice of any planned downtime and will work with the Customer to ensure minimal operational impact. After-hours maintenance requested outside of the established Maintenance Window will be invoiced separately.

Backup Monitoring and Remediation

Datacate will monitor and manage backup systems using a combination of automated alerts and technician oversight. A compatible backup solution capable of generating status reports is required. Datacate will assist in designing and implementing backup systems and will respond to backup failures or issues as they arise to ensure continuous data protection.

Server, Endpoint, and Data Security Management

Datacate will configure, maintain, and monitor supported endpoint and data security solutions on all covered systems. This includes antivirus, antimalware, antispyware, and antispam protections. Unless otherwise specified in the Service Order, Datacate will deploy its standard endpoint security suite. All solutions will be kept up to date and configured per industry best practices. Datacate will coordinate with the Customer regarding any necessary security exceptions and will provide periodic recommendations to support a strong and compliant security posture. Customers agree not to disable, bypass, or interfere with the operation of any deployed security tools. Datacate will investigate and remediate any issues or threats detected through these systems.



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System Performance Monitoring

Datacate will automatically collect performance metrics from all covered servers and workstations, including CPU usage, memory utilization, disk space availability, and system uptime. These statistics are used to identify potential issues, anticipate future resource needs, and support proactive planning and budgeting.

Power Protection System Monitoring

Datacate will monitor compatible UPS and power protection systems to ensure proper operation. Supported devices must be capable of transmitting status data to Datacate's monitoring system, which is reviewed regularly.

2.3. Network Management and Security

Datacate will provide proactive management and monitoring of the Customer's network infrastructure to ensure performance, security, and reliability, including Wide Area Network (WAN) connectivity, wireless (WiFi) Local Area Networks, and wired LAN environments. Support for customer-supplied network devices and configurations will be offered on a best-effort basis and may be limited by device capabilities, familiarity, or access restrictions. Full support, including configuration management, firmware updates, performance monitoring, and advanced troubleshooting, is provided for devices supplied and managed by Datacate.

Wide Area Network (WAN)

Datacate will manage and monitor the Customer's Internet connectivity and edge network infrastructure, including router(s) and security appliance(s), provided Datacate is granted administrative access to these devices. Where applicable, Datacate will implement and maintain firewall rules and VPN configurations to support secure remote access and site-to-site connectivity, and will apply industry best practices for WAN security, including port restrictions, intrusion prevention (where supported), and denial-of-service mitigation.

Wireless Local Area Network (WiFi LAN)

Datacate will manage and support wireless networking infrastructure, including wireless access points (WAPs), controllers, and related software, where applicable. Services include secure configuration of wireless networks (SSID, WPA2/3 encryption, VLAN segmentation), periodic performance assessments, firmware updates, interference mitigation, and troubleshooting of connectivity or signal issues. Datacate will advise on and enforce wireless security policies to limit unauthorized access and ensure proper network segmentation where needed.

Local Area Network – Ethernet (Wired LAN)

Datacate will manage the wired network infrastructure, including switches, patch panels, and cabling endpoints where accessible. Services include switch configuration and monitoring, VLAN management, firmware updates, and physical connectivity diagnostics. Datacate will monitor for network performance degradation, bottlenecks, and potential security issues, ensuring the wired LAN supports secure and stable communication among IT assets and users.

2.4. Printer Support

Datacate will provide basic support for Customer-owned networked and locally connected printers, including assistance with connectivity, driver installation, and ensuring printer accessibility from supported Customer



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workstations. Support includes verifying printer availability on the network, resolving workstation-to-printer communication issues, and confirming that the correct drivers are installed and functioning.

For Multi-Function Printers (MFPs) that are leased or under contract with a third-party service provider, Datacate's support is limited to verifying proper driver installation on Customer workstations and confirming basic network connectivity where applicable. All other maintenance, diagnostics, and service requests for these devices must be handled by the contracted provider.

Routine maintenance tasks for Customer-owned printers—such as replacing ink or toner cartridges, drums, maintenance kits, or addressing hardware faults—are considered out of scope. Datacate may provide guidance on such tasks upon request, but the responsibility for executing them lies with the Customer or a designated third party.

2.5. Productivity Platforms Domain Management

Datacate will provide domain-level administrative support for Customer subscriptions to Microsoft 365 and Google Workspace productivity platforms, subject to being granted sufficient administrative access. Services include account provisioning and deactivation, security and permission policy configuration, user onboarding and offboarding, group and role management, email alias and mailbox configuration, and administration of domain settings related to access, authentication (e.g., MFA), and data sharing policies.

These domain management services are included at no additional cost when the Customer obtains their Microsoft 365 or Google Workspace subscriptions through Datacate, or transfers existing subscriptions to Datacate's management. For subscriptions obtained directly from the publisher or a third party, domain management services are available for an additional fee and are contingent upon Datacate receiving the necessary administrative permissions to perform requested functions.

2.6. Line-of-Business Application Support

Datacate provides basic technical assistance with the installation and configuration of both self-hosted and SaaS business applications, subject to the Customer's valid licensing and applicable publisher support agreements. Support under this agreement includes initial installation, configuration, and verification of application availability. Training, in-depth configuration, and ongoing operational support are not included and may be provided separately on a time-and-materials basis. When necessary, Datacate will act as a liaison with application vendors to facilitate escalated technical support.

2.7. Business Continuity Documentation

Datacate will document covered server and network configurations, including backup configurations and schemas, to support disaster recovery and business continuity planning. Additional documentation beyond that generated by automated tools will be maintained upon request and coordinated with the Customer. The Customer's project hours allowance may be applied toward the creation of supplemental documentation—whether conducted directly with



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Datacate or in collaboration with a third-party consultant—for initiatives such as incident response planning, disaster recovery planning, IT risk assessments, compliance documentation, and other related efforts.

2.8. License Management

Datacate will maintain an inventory of application software and operating system licenses for all covered systems, based on information provided by the Customer and/or their licensors. This inventory will include, but is not limited to:

- Maintaining a centralized list of licenses managed by Datacate
- Identifying and assisting in the remediation of non-compliant software usage
- Advising on license renewals, warranties, and vendor support agreements
- Assisting with the procurement of additional licenses as needed (billed separately)

Datacate strongly recommends that all business-critical software and hardware be maintained under valid support or warranty agreements. Where applicable, Datacate will leverage its vendor relationships to advise the Customer on licensing and maintenance options that may reduce costs or improve software licensing efficiency.

2.9. Telephony Support

Datacate provides basic support for third-party Voice over Internet Protocol (VoIP) phone systems when included in the Customer's Service Order. It is strongly recommended that the Customer maintain an active support contract with the system provider to ensure access to full technical assistance when needed. Datacate will assist with verifying basic connectivity and functionality of network-connected devices and services, including VoIP systems, but configuration, management, or troubleshooting beyond basic network integration is considered out of scope and will be billed separately on a time-and-materials basis.

This provision does not apply where the Customer is utilizing Datacate's own business VoIP phone system solution, which includes comprehensive support under the terms of that Service.

2.10. IT Hardware Procurement and Lifecycle Management

Datacate provides comprehensive procurement services for desktops, laptops, servers, printers, networking equipment, and other IT peripherals. Both OEM new and professionally remanufactured options are available, with flexible purchase or lease terms to meet Customer requirements.

As part of our managed services offering, Datacate assists Customers throughout the entire hardware lifecycle—from specification and procurement through deployment, maintenance, and eventual decommissioning. Services include hardware configuration consultation, warranty coordination, and secure IT asset disposition (ITAD) and e-recycling in accordance with industry standards and regulatory requirements.



2.11. Virtual CTO Services

Datacate provides Virtual Chief Technology Officer (vCTO) services as part of its base Managed Services offering. These services include strategic guidance on IT purchasing, personnel planning, infrastructure design, technology lifecycle management, and industry trends relevant to the Customer's business. Datacate collaborates with Customer leadership to support growth planning, hardware refresh cycles, and long-term IT strategy.

While vCTO services are included at no additional cost for general advisory purposes, any use of vCTO resources for Out-of-Scope work—such as participation in projects, engagement with 3rd party initiatives, or other engagements beyond standard guidance—will be debited against Customer's project hours if available. If vCTO time commitments for such Out-of-Scope work are projected to exceed the Customer's monthly or quarterly project hour allowance, this will be discussed with the Customer in advance.

2.12. User Training

As part of the base Services, Datacate provides limited training for Customer End Users. This training is focused on general orientation, including how to access and use the Helpdesk, utilize IT Assets provisioned under the Services, and follow basic IT best practices. Datacate also offers cybersecurity awareness training and simulated phishing drills as an optional service add-on.

If Datacate and the Customer determine that more in-depth training is needed, such as application-specific instruction, advanced technical training, or departmental workflows, such training may be available from Datacate or a third party and will be invoiced separately.

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Schedule 3. Location and Contact Declaration

Location Nickname	Primary Contact	Address
HQ		1000 River Rock Drive, Suite 220, Folsom, CA 95630
Orchard		6550 Filbert Avenue, Orangevale, CA 95662
River		9601 Lake Natoma Drive, Orangevale, CA 95662

POC Role	Name	Phone	Email	Position/Title
Primary*				
Technical*				
Accounting*				

*Denotes required contacts



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Service Order

Date:	10/24/2025	Company:	Golden Valley Charter Schools
Tel:	916-597-1035	Contact:	Eileen Worthing
Order Number:	1761325390	Email:	eworthing@goldenvalleycharter.org

Order Type:	☒ New ☐ Upgrade ☐ Other:	Start Date:	12/01/2025
		Term:	24 months auto-renew
Service Location:	As specified in the Managed IT Services Addendum attached hereto		

Setup / Non-Recurring Fee(s)

Description of services	Qty	Unit Price	Ext. Price
MSP Helpdesk - Per User	55	\$89.00	\$4,895.00
Datto Cloud Data Protection for MS 365	24	\$15.00	\$360.00
		\$	\$
		\$	\$
SUBTOTAL:			\$5,255.00
20% NON-PROFIT DISCOUNT:			-\$1,051.00
TOTAL:			\$4,204.00

Monthly Recurring Fee(s)

Description of services	Qty	Unit Price	Ext. Price
MSP Helpdesk - Per User • 8x5 desktop/laptop/wkstn support • remote monitoring and mgmt • enterprise endpoint security • system and 3rd-party software updates • user onboarding/offboarding	55	\$89.00	\$4,895.00
Datto Cloud Data Protection for MS 365	24	\$15.00	\$360.00
Managed WAN routing/fw *included*	3	\$0.00	\$0.00
Network printer support *included*	8	\$0.00	\$0.00
Email Domain Management *included*	1	\$0.00	\$0.00
Domain registration *included*	1	\$0.00	\$0.00
DNS hosting and management *included*	1	\$0.00	\$0.00
3 hours per month / 9 hours per quarter consulting and project support	1	\$0.00	\$0.00
SUBTOTAL:			\$5,255.00
20% NON-PROFIT DISCOUNT:			-\$1,051.00
TOTAL:			\$4,204.00



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Date:	10/24/2025	Company:	Golden Valley Charter Schools
Tel:	916-597-1035	Contact:	Eileen Worthing
Order Number:	1761325390	Email:	eworthing@goldenvalleycharter.org

Additional Terms:

1. Upon incurring overages client may choose a contract upgrade as offered by Datacate, Inc., to be applied to the overage period and forward.
2. Recurring Fee(s) are subject to an annual increase not to exceed 5%, applied on each one-year anniversary of the date of Commencement of Service as defined in the governing Agreement.
3. As indicated below (if 'N/A', then none):

N/A

Totals

Setup fee(s)	Monthly Fee(s)	Deposit	Total
\$4,204.00	\$4,204.00	\$0.00	\$8,408.00

Authorization

Signature:		Date:	
Print Name:			



Master Service Agreement

This Master Services Agreement (this “**Agreement**”) is entered into by and between Datacate, Inc. (“**Datacate**”) and the customer executing this Agreement (“**Customer**”). This Agreement is effective once signed and dated by Customer and accepted by Datacate.

This Agreement establishes the general terms and conditions applicable to all services provided by Datacate to Customer. This Agreement governs the overall relationship between the Parties for the provisioning, use, and management of Datacate’s services, whether provided directly or through affiliated entities.

Each **Addendum** sets forth additional or differing terms, conditions, and technical or operational requirements specific to a particular Datacate service type. Each Service Order (“**Order**”) constitutes a separate transaction for the purchase or activation of specific Services under one or more applicable Addenda.

In the event of any conflict between the terms of this Agreement, an Addendum, and/or a Service Order, the following order of precedence shall apply:

- I. The applicable **Addendum** shall control and prevail over this Agreement and any Order, but only with respect to the Services covered by that Addendum;
- II. The applicable **Service Order** shall control and prevail over this Agreement, but only with respect to the specific Services identified in that Order; and
- III. This **Master Services Agreement** shall apply generally to all other matters not expressly covered or superseded by an Addendum or Order.

Except as expressly stated otherwise, all Addenda and Orders are incorporated by reference into and made part of this Agreement. Collectively, this Agreement, its Addenda, and all executed Orders constitute the complete and binding agreement between Datacate and Customer governing the Services.

DEFINITIONS

For purposes of this Agreement and any related Service Orders or Addenda, the following terms shall have the meanings set forth below. Terms used but not defined herein shall have their ordinary meaning in the context of this Agreement.

“**Addendum**” or “**Addenda**” means a written supplement to this Agreement that sets forth additional terms, conditions, and requirements applicable to specific Datacate Service offerings. Each Addendum is incorporated into this Agreement by reference when executed by both Parties or when expressly referenced in a Service Order.



"Agreement" means this Master Services Agreement, together with all incorporated Addenda, Service Orders, and other written amendments or attachments agreed to by the Parties.

"Customer" means the entity identified in the applicable Service Order or signature page of this Agreement, including its authorized employees, contractors, and agents who use or manage the Services.

"Customer Equipment" means any equipment, devices, hardware, software, or other materials owned, leased, or provided by Customer, whether located at a Datacate facility, Customer premises, or any other location, and used in connection with the Services.

"Datacate Equipment" means any equipment, systems, cabling, hardware, or software owned, leased, or managed by Datacate and used to provide or support the Services, excluding Customer Equipment.

"Effective Date" means the date on which this Agreement is executed by the Customer and accepted by Datacate.

"Force Majeure Event" means any act, event, or circumstance beyond a Party's reasonable control that prevents or delays performance under this Agreement, including but not limited to natural disasters, fire, flood, earthquake, pandemic, labor disputes or shortages, governmental actions, acts of terrorism, war, utility interruptions, unavailability of materials or transportation, or the actions or omissions of third parties not under the affected Party's control.

"Initial Term" means the period of time stated in a Service Order or Addendum for which the Services are initially contracted, beginning on the Commencement of Service date and continuing until expiration or renewal as provided herein.

"Managed Hardware" means any server, appliance, device, or other equipment under Datacate's management or administrative control pursuant to a Service Addendum or Order, whether owned by Datacate or Customer.

"Network" means Datacate's data, voice, or IP network infrastructure and related systems, including hardware, software, routers, switches, cabling, facilities, and interconnections owned or controlled by Datacate, used to provide connectivity and Services to Customers.

"Order" or "Service Order" means a written document executed by Customer and accepted by Datacate that specifies the particular Services, quantities, pricing, term, and any special conditions applicable to such Services.

"Party" or "Parties" means Datacate and Customer, individually or collectively, as the context requires.

"Service" or "Services" means any product, function, or deliverable provided by Datacate to Customer pursuant to this Agreement, a Service Order, or an applicable Addendum, including, without limitation, colocation, managed services, cloud services, Internet connectivity, voice/telecom services, data backup, hardware procurement, and professional services.

"Service Commencement Date" means the date on which Datacate makes the Service available for Customer's use, as defined in the applicable Order or Addendum.



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“Service Charges” means all setup fees, recurring monthly fees, usage charges, professional services fees, taxes, and other amounts due from Customer as set forth in the applicable Order or under this Agreement.

“Service Level Agreement” or “SLA” means Datacate’s published policies and commitments regarding the availability and support of Services, as may be included in an Addendum or referenced on Datacate’s website, and as amended from time to time.

“Term” means the Initial Term and any subsequent renewal period(s) of a Service as defined in the applicable Order or Addendum.

“Third-Party Services” means any services, products, or software supplied by entities other than Datacate that may be used or integrated with the Services. Datacate makes no representation or warranty regarding Third-Party Services except as expressly stated in writing.

TERMS AND CONDITIONS

1. **Service Charges and Billing.** Customer agrees to timely pay to Datacate the Setup Fees, the Recurring Charges, and all other charges indicated on the Order or otherwise due hereunder (collectively the **“Service Charges”**). Customer also agrees to pay any applicable local, state, and federal taxes and fees levied or imposed by any governmental authority or regulatory body by reason of the transactions under this Agreement (other than taxes based solely on Datacate’s income), shipping charges (if any), or telephone company charges (if any), all of which shall be billed by Datacate, in addition to the Service Charges (or billed by third-party providers), and shall be the responsibility of the Customer.
 - 1.1. **Initial Payment.** Any and all Setup Fees, as well as the first month’s Recurring Fees, as specified in the Order (the **“Initial Payment”**), will be due and payable with Customer’s completed and signed contract paperwork, unless other arrangements are made and mutually agreed to by Datacate and Customer..
 - 1.2. **Commencement of Service.** Once Customer’s completed paperwork has been accepted by Datacate, and the Initial Payment has been collected, monthly service will commence on (a) the service commencement date requested by Customer, or (b) the **“Start Date”** indicated on the Customer Service Order. Thereafter, Customer’s monthly Service Charges will come due on that same date of each subsequent month. Notwithstanding the above, Customer herein acknowledges that Service Charges will begin to accrue no later than one hundred and twenty (120) days after acceptance of paperwork by Datacate, regardless of whether the Customer has made the Initial Payment, unless arrangements to the contrary have been made in writing between Customer and Datacate. Datacate reserves the right to withhold the provision of services until it receives and accepts all of the following: (i) the Order signed by a representative of the Customer; (ii) this Agreement and any Addenda to this Agreement signed by a representative of the Customer; and (iii) the Initial Payment due under this Agreement.
 - 1.3. **Recurring Charges.** Datacate will bill Customer monthly in advance for the Service(s) and will bill monthly in arrears for any Overage(s) incurred in the prior month. Overages will be billed in increments defined in



the Order or Addendum. Billing for monthly Service Charges will begin on the date of Commencement of Service as defined above. If, however, Customer is unable to use the Services commencing on the Commencement of Service date solely due to delays caused by and within the reasonable control of Datacate, then the date on which monthly Service Charges are billed will be extended by one day for each such day of delay.

- 1.4. **Payment.** All Service Charges and other fees will be due in U.S. dollars on or before the first day of the applicable service period, unless otherwise stated in the applicable Service Order. Late payments will accrue interest at a rate of one and one-half percent (1½%) per month, or the highest rate allowed by applicable law, whichever is lower. If a payment is returned to Datacate with insufficient funds, Customer shall be deemed not to have paid and shall be subject to a returned check charge of \$25.00 and possible termination for Nonpayment as described herein.
- 1.5. **Disputed Charges.** Customer must notify Datacate in writing of any disputed charges within thirty (30) days of the invoice date. Such notice must include reasonable detail describing the nature and basis of the dispute. Datacate will review and respond to the dispute in good faith within a reasonable timeframe. Any portion of an invoice not disputed in accordance with this section shall be deemed accurate and binding, and all undisputed amounts shall remain due and payable per standard terms. Failure to submit a timely written dispute constitutes waiver of the right to contest the charge.
2. **Acceptable Use Policy.** Customer will at all times comply with and conform its use of the Service to the Datacate Acceptable Use Policy (set forth at Datacate's website), as updated from time to time. In the event Customer violates Datacate's Acceptable Use Policy, Datacate shall have the right to immediately suspend Service. Datacate will provide notice and an opportunity to cure, if and to the extent Datacate deems practicable, depending on the nature of the violation and the Customer's availability. Datacate, in its reasonable discretion, may re-enable the Service upon satisfaction that all violations have ceased and with adequate assurance that such violations will not occur in the future.
3. **Updates.** Datacate may update the Datacate Acceptable Use Policy from time to time by posting such updates on Datacate's website. References herein to the Datacate Acceptable Use Policy shall mean the most updated version of such policies or procedures posted on Datacate's website.
4. **Prohibited Uses.** In addition to complying with the Acceptable Use Policy, Customer specifically warrants and represents that it shall not do or allow any use which in the opinion of Datacate, causes or is likely to cause damage or constitutes a nuisance or annoyance to the facility, equipment, personnel, or other customers.
5. **Illegal Use.** Customer will cooperate in any investigation of Customer's alleged illegal use of Datacate's Services or other networks accessed through Datacate. If Customer fails to cooperate with any such investigation, Datacate may suspend Customer's Service. Additionally, Datacate may modify or suspend Customer's Service in the event of illegal use of the Network or as necessary to comply with any law or



regulation, including the Digital Millennium Copyright Act of 1998, 17 U.S.C. 512, as reasonably determined by Datacate.

6. **Other Networks.** Customer is responsible for paying any fees, obtaining any required approvals, and complying with any laws or usage policies applicable to transmitting data beyond the Network and/or through other public and private networks. Datacate is not responsible or liable for the performance or nonperformance of such networks or their interconnection points.
7. **Availability of Services.** Subject to the terms and conditions of this Agreement, Datacate shall use commercially reasonable efforts to provide the Services on a continuous basis throughout the term of this Agreement. Customer understands and agrees that from time to time, the Services may be inaccessible or inoperable for any reason, including, without limitation: equipment malfunctions, periodic scheduled maintenance; or causes beyond the control of Datacate or that are not reasonably foreseeable by Datacate, including, without limitation, interruption or failure of telecommunication or digital transmission links or equipment, hostile network attacks, network congestion or other failures. Customer further understands and agrees that the Services may be unavailable during periods of time for which scheduled or requested upgrades or downgrades to its Managed Hardware are being performed. The Customer understands and agrees that Datacate cannot and does not guarantee availability of the Services on a continuous or uninterrupted basis.
8. **Service Suspension.** Datacate may temporarily suspend or restrict all or part of the Services, without liability, if Datacate reasonably determines that such action is necessary to:
 - 8.1. prevent actual or suspected security breaches, data loss, or network instability;
 - 8.2. protect Datacate's systems, facilities, or other customers from harm or interference;
 - 8.3. comply with applicable law, regulation, or governmental order; or
 - 8.4. address any other condition that, in Datacate's reasonable judgment, poses an immediate threat to the integrity or performance of its network or Services.

Whenever practicable, Datacate will provide advance notice of any such suspension and will restore the affected Services promptly after the underlying issue has been resolved. Suspension under this section shall not relieve Customer of its payment obligations under this Agreement or any applicable Service Order.
9. **Technical Support.** Datacate's Services include a Service Level Agreement (SLA) for technical support for Service availability. Datacate only supports its Customers and will not furnish support to third parties. Datacate offers optional professional services to enhance support for items not covered under the SLA.
10. **Change Management.** Datacate may, from time to time, make changes to its network architecture, systems, security controls, procedures, or facilities as part of its ongoing operations, maintenance, or service improvement efforts. Such changes may include software upgrades, hardware replacements, configuration



adjustments, or policy updates intended to enhance performance, reliability, or security. Datacate will ensure that any such operational changes do not materially diminish the quality, functionality, or availability of the Services provided to Customer. For any material change that may reasonably affect Customer's use of the Services, Datacate will provide advance notice to Customer in writing or through electronic means, specifying the expected scope, timing, and impact of the change.

10.1. **Emergency Changes.** Datacate reserves the right to implement emergency changes without prior notice when necessary to maintain security, comply with law, or prevent service disruption, provided that Datacate shall notify Customer as soon as reasonably practicable thereafter.

11. **NO WARRANTY.** EXCEPT AS SPECIFICALLY SET FORTH HEREIN, THE SERVICES ARE PROVIDED ON AN "AS IS" BASIS, AND CUSTOMER'S USE OF THE SERVICES IS AT CUSTOMER'S OWN RISK. DATACATE DOES NOT MAKE AND HEREBY DISCLAIMS ANY AND ALL OTHER EXPRESS AND IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, NON-INFRINGEMENT AND TITLE, AND ANY WARRANTIES ARISING FROM A COURSE OF DEALING, USAGE, OR TRADE PRACTICE. DATACATE DOES NOT WARRANT THAT THE SERVICES WILL BE UNINTERRUPTED, ERROR-FREE, OR COMPLETELY SECURE. DATACATE SHALL NOT BE LIABLE UNDER ANY CIRCUMSTANCES FOR ANY SPECIAL, CONSEQUENTIAL, INCIDENTAL OR EXEMPLARY DAMAGES ARISING OUT OF OR IN ANY WAY CONNECTED WITH THIS AGREEMENT OR THE PRODUCT, INCLUDING BUT NOT LIMITED TO DAMAGES FOR LOST PROFITS, LOSS OF USE, LOST DATA, LOSS OF PRIVACY, DAMAGES TO THIRD PARTY EVEN IF DATACATE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. THE FOREGOING LIMITATION OF LIABILITY SHALL APPLY WHETHER ANY CLAIMS BASED UPON PRINCIPLES OF CONTRACT, WARRANTY, NEGLIGENCE, OR OTHER TORT, BREACH OF ANY STATUTORY DUTY, PRINCIPLES OF INDEMNITY OR CONTRIBUTION, THE FAILURE OF ANY LIMITED OR EXCLUSIVE REMEDY TO ACHIEVE ITS ESSENTIAL PURPOSE, OR OTHERWISE. CUSTOMER WILL BE RESPONSIBLE FOR THE USAGE OF ITS ACCOUNT AND ANY CONSEQUENCES OF THIS USAGE.

12. **Disclaimer of Third Party Actions and Control.** Datacate does not and cannot control the flow of data to or from the Network and other portions of the Internet. Such flow depends in large part on the performance of Internet services provided or controlled by third parties. At times, actions or inaction by these third parties can result in situations in which Customer's Internet connections (or portions thereof) may be impaired or disrupted. Datacate cannot guarantee that such situations will not occur and, accordingly, Datacate disclaims any and all liability resulting from or related to such events. In the event that Customer's use of the Service or interaction with the Internet or third parties is causing or threatening to cause harm to the Network or its operations, Datacate shall have the right to suspend the Service. Datacate shall restore Service at such time as it reasonably deems that there is no further harm or threat of harm to the Network or its operations.

13. **System and Network Security.** Security is an important part of both Datacate's and Customer's business operations. Datacate maintains commercially reasonable administrative, technical, and physical safeguards designed to protect the integrity and availability of its network, facilities, and systems used to deliver Services. These safeguards are regularly reviewed and updated to reflect current best practices and threat conditions.



Datacate's security responsibility extends only to those systems, environments, and components over which Datacate maintains administrative control, including systems for which Datacate holds credentials, configuration authority, or other management rights as part of a contracted Service.

Except where a specific Service Addendum expressly assigns such functions to Datacate, Customer remains solely responsible for:

- 13.1. Maintaining accurate configuration of its own systems, applications, and devices;
- 13.2. Managing and safeguarding all user accounts, passwords, encryption keys, and other credentials;
- 13.3. Installing and maintaining appropriate security, antivirus, and anti-malware protections;
- 13.4. Performing regular data backups and verifying recoverability; and
- 13.5. Adhering to Datacate's published security and access control policies when connecting to or using Datacate systems or facilities.

Keeping systems secure and up to date is a continuous process and a shared obligation. Datacate will use commercially reasonable efforts to assist when incidents occur within its area of management responsibility; however, disinfection, restoration, or remediation of compromised systems is Customer's responsibility unless expressly included within the scope of the Services under the applicable Addendum.

Datacate reserves the right to temporarily disable or isolate any Customer system, software, or Service from its network if Datacate determines that such system or Service poses a threat to Datacate's infrastructure, other customers, or network operations. Datacate will, when practicable, notify Customer of such action and restore connectivity once the issue is resolved to Datacate's reasonable satisfaction.

14. Limitations of Liability.

- 14.1. **Personal Injury.** Datacate will not be liable for any harm or personal injury to Customer Personnel or customers resulting from any cause, other than Datacate's gross negligence or willful misconduct.
- 14.2. **Damage to Customer Equipment.** Datacate is not liable for damage to, or loss of any of Customer Equipment resulting from any cause, other than Datacate's gross negligence or willful misconduct, and then only in an amount not to exceed the costs to repair or replace damaged Customer Equipment, whichever is lower.
- 14.3. **Damage to Customer Business.** In no event will Datacate be liable for any incidental, punitive, indirect, or consequential damages (including without limitation any lost revenue or lost profits) or for any loss of technology, loss of data, or interruption or loss of use of Service or any other similar claims by Customer or related to Customer's business, even if Datacate is advised of the possibility of such damages.



14.4. **Maximum Liability.** Unless otherwise set forth in this Agreement, Datacate's maximum aggregate liability to Customer related to or in connection with this Agreement, whether under theory of contract, tort (including negligence), strict liability or otherwise, will be limited to the total amount paid by Customer to Datacate for one month's service.

15. Indemnification.

15.1. **By Customer.** Customer will indemnify, defend and hold harmless Datacate, its directors, officers, employees, affiliates and customers (collectively, the "Datacate Covered Entities") from and against any and all claims, actions or demands brought against any of the Datacate Covered Entities alleging: (a) with respect to the Customer's business: (i) infringement or misappropriation of any intellectual property rights; (ii) defamation, libel, slander, obscenity, pornography, or violation of the rights of privacy or publicity; or (iii) spamming or any other offensive, harassing or illegal conduct or violation of the Acceptable Use Guidelines; (b) any personal injury suffered by any Customer Personnel arising out of such individual's activities related to the Services, unless such injury is caused by Datacate's negligence or willful misconduct; or (c) any other damage arising from the Customer Equipment or Customer's business, (collectively, the "Customer Covered Claims"). Customer agrees to reimburse Datacate for the expense and cost of handling such claims, including, without limitation, legal fees.

15.2. **Notice Procedure.** Datacate will provide Customer with prompt written notice of each Customer Covered Claim of which Datacate becomes aware, and, at Datacate's sole option, Datacate may elect to participate in the defense and settlement of any Customer Covered Claim, provided that such participation shall not relieve Customer of any of its obligations under this Section. Customer shall have the right to control the defense of any Customer Covered Claim.

16. **Confidentiality.** Each Party acknowledges that, in the course of performing under this Agreement, it may receive or have access to the other Party's confidential or proprietary information, including but not limited to business plans, customer data, financial data, technical information, system configurations, or trade secrets ("Confidential Information").

16.1. **Use of Information.** Each Party agrees to maintain the confidentiality of all such Confidential Information and to use it solely for the purpose of fulfilling its obligations under this Agreement. Neither Party shall disclose Confidential Information to any third party without the prior written consent of the disclosing Party, except to employees, contractors, or agents who have a need to know such information and are bound by confidentiality obligations no less restrictive than those set forth herein.

16.2. **Limits to Obligations.** Confidentiality obligations shall not apply to information that (i) is or becomes publicly available through no fault of the receiving Party; (ii) is rightfully obtained by the receiving Party from a third party without restriction; (iii) is independently developed by the receiving Party without reference to the disclosing Party's Confidential Information; or (iv) is required to be disclosed by law,



regulation, or court order, provided that the receiving Party provides prompt notice to the disclosing Party and cooperates in seeking appropriate protective measures.

16.3. **Survival.** The obligations in this section shall survive for three (3) years following termination or expiration of this Agreement.

17. **Data Privacy and Security.** Datacate will implement and maintain commercially reasonable administrative, technical, and physical safeguards designed to protect the security, confidentiality, and integrity of Customer data processed or stored by Datacate in connection with the Services. Datacate will not access or use Customer data except as necessary to provide the Services, prevent or address service or technical issues, or as otherwise required by law.

17.1. **Customer Responsibility.** Customer remains solely responsible for (i) data backups, retention, and recovery, (ii) the security configuration of its systems, applications, and credentials, and (iii) compliance with any data privacy or protection obligations applicable to its own operations, except to the extent that a specific Addendum expressly assigns such responsibility to Datacate.

17.2. **Access to Customer Data.** Where Datacate provides services involving access to or management of Customer systems, Customer authorizes Datacate to process data to the extent necessary for performance and acknowledges that Datacate acts as a data processor or service provider under applicable data protection laws.

18. **Term.** Unless otherwise specified in the Customer's Service Order, this Agreement will commence on the Effective Date and shall expire at the end of the last "Term" specified in any Order, unless sooner terminated as provided below, **provided, however, that each Order shall automatically renew for additional periods of the same length as the Initial Term upon the end of its Term unless one party provides the other written notice that it is terminating such Order no less than 30 days prior to the end of the Term specified in the Order.**

19. **Termination.**

19.1. **Nonpayment.** If Datacate does not receive from Customer any fee(s) due hereunder on or before the due date for said fee(s), Datacate may suspend any and all Service(s) provided by Datacate to Customer. To reinstate such services, Datacate may require Customer to pay all past due fees and a reactivation fee of not less than \$100.00. It is the Customer's responsibility to make sure that Datacate receives all payments due hereunder by the payment due date. Returned checks or rejected credit cards may also result in suspension of services. Additionally, if Customer fails to make any payment within 15 days of their due date, Datacate may also, in its discretion terminate this Agreement (or at its option, only the relevant Order).

19.2. **Unacceptable Use.** Datacate may immediately terminate this Agreement if Customer violates any provision of the Datacate Acceptable Use Guidelines that results or could result in suspension by



Datacate. If Datacate so Terminates Customer, Datacate will refund to Customer of the unused portion of any regular Service fees paid.

- 19.3. **For Other Cause.** Except as otherwise stated, Datacate may immediately terminate this Agreement if Customer breaches any material term or condition of this Agreement.
- 19.4. **Convenience (Customer).** Customer may request early termination of a Service Order for convenience by providing Datacate not less than thirty (30) days' prior written notice of its intent to terminate. Any such termination request shall be subject to review and written acceptance by Datacate, Inc., in its sole discretion. Early termination will not relieve Customer of its obligations under this Agreement or any Addendum except as expressly provided in Datacate's written acceptance of the termination. Datacate reserves the right to condition acceptance of early termination on full settlement of any outstanding obligations or other reasonable requirements.
- 19.5. **Effect of Termination.** Upon expiration or termination of this Agreement: (a) Datacate will cease providing the Services; (b) all of Customer payment obligations under this Agreement, including but not limited to monthly Service Fees through the end of the Term indicated on the Order(s) will become due in full immediately.
20. **Survival.** The Parties' respective representations, warranties, and covenants, together with obligations of indemnification, confidentiality, and limitations on liability, will survive the expiration, termination or rescission of this Agreement and continue in full force and effect.
21. **Governing Law and Venue.** This Agreement shall be governed by and construed in accordance with the laws of the State of California, without regard to conflict-of-law principles. The Parties agree that the proper and exclusive venue for any action or proceeding permitted under this Agreement, including but not limited to actions to enforce an arbitration award or to obtain injunctive relief, shall be in the state or federal courts located in Sacramento County, California. Each Party irrevocably consents to the personal jurisdiction of such courts and waives any objection to venue or forum on the basis of inconvenience.
22. **Mediation and Arbitration.**
- 22.1. **Mediation.** Any dispute, claim, or controversy arising out of or relating to this Agreement, including its formation, interpretation, performance, or breach, shall first be submitted to mediation in Sacramento County, California, administered by a mutually agreed mediator. The Parties shall share the cost of mediation equally and shall make good faith efforts to resolve the dispute through this process.
- 22.2. **Arbitration.** If the dispute is not resolved through mediation within thirty (30) days of initiation, either Party may submit the matter to binding arbitration under the rules of JAMS or the California Code of Civil Procedure §1280 et seq., to be conducted in Sacramento County, California. The arbitration shall be presided over by a single neutral arbitrator, and judgment upon the award rendered by the arbitrator may be entered in any court having jurisdiction.



22.3. **Fees and Waiver.** Each Party shall bear its own legal fees and expenses unless otherwise determined by the arbitrator. By agreeing to arbitration, the Parties understand that they are waiving the right to a jury trial or other court proceedings, except as necessary to enforce the arbitrator's award or to seek injunctive relief.

23. Miscellaneous Provisions.

23.1. **Force Majeure.** Other than with respect to failure to make payments due hereunder, neither party shall be liable under this Agreement for delays, failures to perform, damages, losses or destruction, or malfunction of any equipment, or any consequence thereof, caused or occasioned by, or due to fire, earthquake, flood, water, the elements, labor disputes or shortages, utility curtailments, power failures, explosions, civil disturbances, governmental actions, shortages of equipment or supplies, unavailability of transportation, acts or omissions of third parties, or any other cause beyond its reasonable control. However, Customer shall not be charged for Service for the duration of the time in which the Customer's Service is thereby rendered inactive.

23.2. **Government Regulations.** Customer will not export, re-export, transfer, or make available, whether directly or indirectly, any regulated item or information to anyone outside the U.S. in connection with this Agreement without first complying with all export control laws and regulations which may be imposed by the U.S. Government and any country or organization of nations within whose jurisdiction Customer operates or does business.

23.3. **Compliance with Laws.** Each Party shall, at its own expense, comply with all applicable federal, state, and local laws, regulations, and industry standards in connection with its performance under this Agreement, including but not limited to laws governing data protection, privacy, export control, and electronic communications. Customer shall be solely responsible for ensuring that its use of the Services complies with all applicable legal and regulatory requirements. Datacate will cooperate with lawful requests from governmental or regulatory authorities as required, provided that, unless prohibited by law, Datacate shall provide prompt notice to Customer of any such request that may affect Customer's data or use of the Services.

23.4. **Assignment.** Neither party may assign its rights or delegate its duties under this Agreement, either in whole or in part without the prior written consent of the other party, except to an affiliate or a party that acquires substantially all of the assigning party's assets, or a majority of its stock, as part of a corporate merger or acquisition. Any attempted assignment or delegation without such consent will be void. This Agreement will bind and inure to the benefit of each party's successors and permitted assigns.

23.5. **Notices.** Any required notice hereunder may be delivered personally or by courier; sent by confirmed facsimile; or mailed by registered or certified mail, return receipt requested, postage prepaid, or by Internet email with return receipt requested, to either party at the name and address on the signature page of this Agreement, or at such other address as such party may provide to the other by written



notice. Such notice will be deemed to have been given as of the date it is delivered personally or by courier, or five (5) days after it is sent by confirmed facsimile, mailed, or emailed.

- 23.6. **Severability and Waiver.** If any provision of this Agreement, or the application thereof to any person or circumstance, is held to be invalid or unenforceable, the remaining provisions shall remain in full force and effect and shall be construed so as to best give effect to the intent of the Parties. The failure of either Party to enforce any provision of this Agreement shall not be construed as a waiver of such provision or of the right to enforce it thereafter, nor shall any single or partial exercise of any right preclude any other or further exercise of that or any other right.
- 23.7. **Counterparts and Electronic Signature.** This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. The Parties agree that execution and delivery of this Agreement by facsimile, PDF, or other electronic signature method shall be legally valid and binding to the same extent as an original handwritten signature. Electronic copies of this Agreement, when fully executed, shall be considered originals for all purposes.

ACCEPTANCE

IN WITNESS WHEREOF, Customer has caused this Addendum to be signed by Customer's duly authorized representative as of the date set forth below.

Datacate, Inc

Provider

Signature

Name

Title

Date

Golden Valley Charter Schools

Client

Signature

Name

Title

Date



IT Support Services for Golden Valley Charter Schools

November 5, 2025

Ms. Jennifer Hoover
Acting Executive Director
Golden Valley Charter Schools
1000 River Rock Drive, Suite 200
Folsom, CA 95630

Dear Jennifer,

Thank you for the opportunity to submit a Proposal for IT Support Services for Golden Valley Charter Schools. We are excited about the potential partnership and believe that our experience supporting charter schools positions us uniquely to meet your needs.

I am a former charter school leader, having started and led a 7-school charter network for 13 years. When I left charter school leadership 9 years ago, I co-founded Inspiroz with the aim that we would be the leader in IT, ed tech and data work for charter schools (our parent company has existed in the IT space for 33 years). Today, Inspiroz works almost exclusively with charter schools, approximately 250 of them across the country, including many schools similar to Golden Valley Charter Schools.

Our aim is pure: we want to help schools and kids succeed -- we do this by delivering creative, high-quality technology solutions for schools and education-focused organizations. We are a mission-focused organization and we're proud of the impact we're having.

We want to make sure the following items shine through as we believe they demonstrate why we are a good choice:

1. Experience with IT, and experience with schools -- **we know what leaders and teachers want/need**. Importantly, we use this knowledge to develop structures, processes and communication streams customized for schools.
2. Ability to **effectively transition and onboard school networks** like Golden Valley Charter Schools.
3. We prioritize providing **top-notch user support** -- we emphasize **customer delight**, not just customer satisfaction.
4. We will be a **strategic partner** that will ensure IT and technology are used to improve effectiveness and efficiency of operations.
5. We have significant experience working with **charter networks your size and larger, and we have helped them grow**.
6. We are inspired by the opportunity to be your long-term partner, and we will ensure Golden Valley Charter Schools has the IT and technology systems, processes, infrastructure and support to succeed as you continue to grow. We will grow with you, we will push you, and we will provide quality at a good value.
7. We are a **certified minority owned business** and we're proud that we bring a **diverse team** to our work.

In closing, I want to share three items:

1. This may sound cheesy but, at the end of the day, this is not just a normal Proposal for us. Working with partners like Golden Valley Charter Schools is why we exist. We are hungry to be your new IT Partner.
2. Quality matters most to us, which is why we have proposed a structure and solution that will deliver the highest level of service.
3. Above all, we will be your partner. We hope that comes through loud and clear in this Proposal.

Thank you for the opportunity and we look forward to the possibility of supporting Golden Valley Charter Schools.

Sincerely,



Lars Beck

Inspiroz President & Co-Founder

A. Inspiroz Background

ACS International Resources, parent to Inspiroz, has been providing different forms of IT services and consulting for 33 years with great success. Today, the core of our work is in Fully Managed IT Services (including cybersecurity focus), but we also provide extensive Procurement, Lifecycle Management, Strategic Consulting, Software Development/Data Automation, and Business Outsource services (the additional services have all grown from partnerships with clients). Currently, we work in 13 states and have 210 employees.

Our organization focused exclusively on providing Managed IT Services to small and medium-sized businesses (SMB) until 2012 when KIPP Philadelphia became our first school partner.

In 2016, we created Inspiroz to fully focus our work on K-12 education. Inspiroz is unique in that we focus our work on charter schools and those that support charter schools, and we understand what is needed to create and maintain an IT environment that allows teachers and leaders to drive student outcomes and operational excellence. Today, Inspiroz works with more than 250 schools, 125,000 students, and 15,000 staff in 13 states across the country. Among our clients are networks such as KIPP Philadelphia (8 schools), KIPP Atlanta (13 schools), KIPP Jacksonville (4 schools), KIPP Baltimore (3 schools), KIPP NorCal, KIPP NYC (18 schools) KIPP Capital (7 schools), Democracy Prep (25 schools), Rocketship Public Schools (20+ schools), Uncommon Schools (60 schools), Achievement First (43 schools) and James Irwin Charter Schools (6 schools), as well as stand-alone charter schools such as Young Scholars, Forte Preparatory Academy, Cristo Rey Philadelphia High School, Westtown School, Jersey City Global, and Booker T. Washington as well as Citizens of the World LA and Grow Public Schools (both in CA).

How We Work -- Mission, Vision & Values

We are an organization driven by Mission, Vision and Values. Because of this, working with you matters a lot. We believe this translates into greater ownership and responsiveness than others doing this work which, in turn, translates to greater outcomes for Golden Valley Charter Schools. Because we are a mission-driven organization, we will do everything we can to ensure we do our part to ensure Golden Valley Charter Schools achieves its mission.

Core Focus/Vision:

We help schools and kids succeed.

Mission/Niche:

We deliver creative, high-quality technology solutions for schools and education-focused organizations.

Values:

Be Courageous

Embrace challenge, speak up, view feedback as a gift, and enjoy the impact of our work.

The Extra Mile

Go above and beyond, do the little things, find a way, and add value.

Today, Not Tomorrow

Do what's most important first, and when you can do something right away, do it.

Communicate, Communicate, Communicate

Keep people informed, be timely, and default to overcommunication.

B. Scope of Services

At Inspiroz, we understand that the heart of effective IT management lies in comprehensive and proactive managed services. Managed services encompass a holistic approach to IT infrastructure, ensuring that Golden Valley Charter Schools's technology assets not only function seamlessly but also align with your strategic objectives. Our managed services approach involves constant vigilance, meticulous planning, and rapid response to ensure the stability, security, and performance of your IT systems. From network and infrastructure management to cloud services, cybersecurity, and end-user support, we include in our scope of services what is needed to cater to your needs. We recognize that each school partner is distinct, and we tailor our managed services to provide targeted solutions that optimize your IT environment, reduce operational risk, and enhance business continuity. By choosing Inspiroz as your managed service provider, you are embracing a partnership founded on technological expertise, charter school knowledge and best practices, and a commitment to your organization's growth and success.

Our technical approach to managed services is built upon a solid foundation of industry-standard best practices, and we are proud to leverage the ITIL (Information Technology Infrastructure Library) framework. This internationally recognized framework governs our service delivery, ensuring that we provide consistently high-quality IT management solutions. Our adherence to ITIL principles means that we operate with efficiency and transparency, streamlining processes and optimizing the use of resources to deliver the best possible outcomes for our clients.

1. Information Technology Leadership Services

Inspiroz believes that effective IT leadership goes beyond just technical support; it involves strategic partnership, proactive planning, and alignment with the educational mission of Golden Valley Charter Schools. Our leadership approach is built on collaboration, communication, and a deep understanding of the unique needs of charter schools.

a. Support Multi-Year Technology Plan Development and Strategy Implementation

We will work closely with Golden Valley Charter Schools's leadership to develop a comprehensive technology plan that aligns with the school's educational goals and growth objectives. Our approach includes:

- Conducting an initial assessment of your current technology infrastructure and needs
- Collaborating with school leadership to establish strategic priorities
- Creating a 3-5 year technology roadmap with clear implementation timelines
- Establishing measurable outcomes to track progress
- Providing regular updates and adjusting strategies as needed

Our Technical Account Manager will serve as your Virtual CIO (vCIO), ensuring that Golden Valley Charter Schools is thinking strategically about technology, making smart financial decisions, and spending appropriately. We help you find ways to use technology to drive academic and operational excellence.

b. Communicate Technology Issues and Needs to Diverse Stakeholders

Effective communication is one of our core values. We will:

- Establish clear communication channels with Golden Valley Charter Schools's operations and technology team
- Provide regular reports on technology performance, issues, and improvements
- Translate technical concepts into language that is accessible to all stakeholders
- Ensure all stakeholders have the information they need to make informed decisions

c. Foster a Long-Term Strategic Partnership

We are committed to building a lasting partnership with Golden Valley Charter Schools that goes beyond basic IT support. This includes:

- Aligning our services with your educational and technological goals

- Regularly reviewing and refining our approach based on feedback
- Building relationships based on trust, transparency, and shared objectives
- Becoming an extension of your team rather than just an external vendor
- Consistently demonstrating our commitment to your success

d. Provide Consultation and Advice on Future Technology Trends

Our team stays at the forefront of educational technology trends to provide Golden Valley Charter Schools with informed recommendations. We will:

- Research and recommend innovative technologies that enhance learning
- Evaluate emerging trends for potential application in your environment
- Provide cost-benefit analyses for new technology investments
- Ensure recommendations align with your curriculum and teaching approaches
- Help you navigate the rapidly evolving educational technology landscape

e. Actively Participate in Planning and Decision-Making Processes

We will work hand-in-hand with you to ensure Golden Valley Charter Schools's technology needs are met with foresight and adaptability. This includes:

- Attending planning meetings and contributing to technology-related decisions
- Providing technical expertise during budgeting processes
- Helping evaluate technology proposals and vendor options
- Assisting with long-term capacity planning to support growth
- Ensuring decisions are made with complete information and clear understanding of implications

f. Assist in Coordinating Third-Party Vendors

We understand the complexity of managing multiple technology vendors and will help streamline this process by:

- Serving as the primary liaison with telecommunications, internet service, and other providers
- Maintaining strong vendor relationships and managing all technical communications
- Coordinating service implementations and handling support escalations
- Ensuring vendors meet their service level agreements
- Facilitating seamless integration between various systems and services
- Ensuring prompt resolution of any issues with external providers

2. Network Systems Administration and Server Support Model

Effective network management is the backbone of a reliable educational technology environment. An effective support model is critical to maintaining the reliability and performance of educational technology systems. Inspiroz has developed a comprehensive service support model specifically tailored for charter schools, combining proactive monitoring, clear escalation procedures, and rapid response capabilities to ensure minimal disruption to teaching and learning.

Our Network Operations Center (NOC) and Professional Services Team work together to deliver proactive monitoring, maintenance, and support for all aspects of your network infrastructure, including firewalls, routers, servers, wireless networks, switches, caching appliances and UPS as well as services such as internet connectivity, email and web filtering.

Our comprehensive server management approach ensures that all on-premise devices and systems remain secure, up-to-date, and performing at optimal levels. Inspiroz implements a structured maintenance schedule that includes regular server patching, security updates, and system optimization to prevent vulnerabilities and maintain peak performance.

a. Analyze Existing Network Infrastructure

We will conduct a thorough analysis of Golden Valley Charter Schools's current network infrastructure to identify strengths, weaknesses, and opportunities for optimization:

- Performing a comprehensive network assessment within the first three months of our partnership
- Mapping your current network topology and documenting all components
- Evaluating performance metrics, bandwidth utilization, and bottlenecks
- Assessing security measures and identifying potential vulnerabilities
- Providing detailed reports with clear recommendations for improvements

Based on this analysis, we will present cost-effective recommendations to optimize your network infrastructure hardware and software, focusing first on maximizing what you already have in place to minimize investment needs.

b. Implement Continuous 24/7 Network Monitoring Tools

Our Network Operations Center (NOC) provides around-the-clock monitoring of your entire network infrastructure:

- Deploying advanced monitoring tools to track the health and performance of all network devices
- Setting up automated alerts for potential issues such as network outages, hardware failures, or performance degradation
- Configuring thresholds to identify problems before they impact school operations
- Providing real-time visibility into the status of critical systems
- Ensuring both Inspiroz and Golden Valley Charter Schools' staff is promptly notified of potential issues

Our monitoring systems generate automatic alerts that create tickets in our ConnectWise management system, ensuring rapid response to any detected issues.

c. Conduct Routine Network Management Tasks

To minimize disruption to school operations, we will:

- Schedule system updates, performance tuning, and maintenance during off-hours
- Perform regular reviews of error logs and system performance metrics
- Implement preventative maintenance procedures to reduce the likelihood of failures
- Document all routine tasks and their outcomes
- Coordinate with school staff to identify optimal maintenance windows

Our goal is to keep your systems running smoothly with minimal impact on the school day.

d. Conduct Routine Device Maintenance

Working in close coordination with Golden Valley Charter Schools' staff, we will:

- Implement a regular maintenance schedule for all network devices
- Install updates and patches during scheduled maintenance windows to minimize disruption
- Perform these activities outside of school hours whenever possible
- Conduct proactive health checks to identify and address potential issues
- Document all maintenance activities and their outcomes

Our maintenance approach is designed to prevent problems before they occur, reducing the likelihood of unexpected outages during critical school hours.

e. Define Clear Escalation Procedures

We establish well-defined escalation paths to ensure appropriate response based on the severity of issues:

- Creating a customized escalation matrix based on Golden Valley Charter Schools' specific needs
- Implementing priority-based response protocols for different types of issues
- Ensuring critical system failures receive immediate attention

- Providing clear documentation of escalation procedures for both Inspiroz and Golden Valley Charter Schools' staff
- Regularly reviewing and refining these procedures based on experience

This structured approach ensures that urgent issues such as complete network outages or data loss are addressed as quickly as possible by the appropriate personnel.

f. Ensure Capability for Rapid Remote Remediation

Our support model includes robust capabilities for emergency response:

- Maintaining 24/7/365 availability of our technical support team
- Implementing secure remote access solutions for immediate troubleshooting
- Equipping our team with the tools and authority to address critical issues
- Establishing backup communication channels in case primary systems are affected
- Conducting regular drills to ensure readiness for emergency situations

This approach ensures that even during off-hours emergencies, our team can quickly diagnose and resolve issues to minimize disruption to Golden Valley Charter Schools' operations.

g. Maintain and Monitor Network Hardware/Software Warranties

Keeping track of warranties and replacement schedules is crucial for effective budget planning and minimal downtime. We will:

- Create and maintain a comprehensive inventory of all network equipment
- Track warranty status and expiration dates for all hardware
- Provide regular reports on equipment approaching end-of-life
- Recommend proactive replacements to prevent failures
- Handle warranty claims and coordinate repairs or replacements

This systematic approach ensures that Golden Valley Charter Schools can plan for necessary upgrades and avoid unexpected expenses or outages.

h. Ensure Appropriate Backup and Recovery Processes

Data protection is essential, and we will implement robust backup and recovery solutions including:

- Assessing critical data assets and backup requirements
- Implementing automated backup solutions with appropriate retention policies
- Regularly testing recovery procedures to ensure data can be restored when needed
- Encrypting backup data to maintain security
- Developing a comprehensive disaster recovery plan tailored to Golden Valley Charter Schools' needs

Our backup and recovery strategy will ensure that Golden Valley Charter Schools' data is protected and can be quickly restored in the event of any disaster or data loss.

i. Documentation

Our onboarding information collection process includes a thorough documentation of all aspects of network (WAN and LAN), servers, backups, cloud services, etc. We will create detailed network and server connectivity diagram with uplink, port details etc.

We do use a change management system built into the workflow of our ticketing portal. Any change request will have to be documented with detailed task list and reversing plan with backups. Customer approval and schedule is a required step before proceeding with any change management. There are multiple approvals required if it is a Tier 1 priority critical requests/device and a single approval for Tier 2 and Tier 3 priority devices.

All logs from core network and server devices will be backed to a syslog server and will be maintained for 60 days as far as the storage could support it. We will be reviewing logs for core devices on monthly basis and will provide recommended preventive maintenance tasks and time to the Golden Valley Charter Schools' team.

j. Inventory

Inspiroz will implement and maintain an inventory through its RMM of all infrastructure devices, including WAPs, switches, servers (physical and virtual), etc., that is up to date at least nightly and 99% accurate at all times. The inventory will at a minimum be filterable by location and technology category. The inventory will be accessible 24/7/365 by designated Golden Valley Charter Schools' staff and will be able to be exported to XLS or CSV format on demand by designated Golden Valley Charter Schools' staff. The inventory system will at a minimum track end-of-life dates, location, make, model, technology category, serial number, an asset tag. Annually, we will work in conjunction with the Golden Valley Charter Schools' staff to perform an inventory audit to validate the accuracy of the database.

3. Efficient Communication Methods

Effective communication is foundational to successful IT support. At Inspiroz, we implement comprehensive communication systems and processes to ensure clear, timely, and efficient interactions between our team and Golden Valley Charter Schools' staff. Our approach emphasizes transparency, accountability, and collaboration.

a. Implement a Centralized Communication Platform

We will deploy ConnectWise, our industry-leading ticketing system, to serve as the central hub for all technology-related communications:

- Providing multiple channels for submitting support requests (email, phone, web portal)
- Creating a comprehensive record of all issues, requests, and their resolution
- Ensuring all communications are properly documented and accessible to authorized personnel
- Enabling real-time status updates on open tickets
- Generating reports to track performance metrics and identify trends

ConnectWise Manage is a Complete IT Business Management Platform with features including:

- Multi-Channel Ticketing — Users can send tickets by email, customer portal and text. We also accept tickets by phone when necessary, and our Service Desk team members log those calls into the ticketing system.
- Automated Scheduling — ConnectWise Manage enables automated scheduling and reminders between end users and Service Desk Technicians to ensure no service calls are missed.
- Automated Escalations — The Service Desk workflow simplifies the process by automating the escalation of service tickets, notifications, and team assignments.
- Team Performance — Service dashboards and reporting options provide data on ticket details, issue resolution times, and service team performance.
- Intelligent Dispatching — Provides visibility into Service Desk team availability, allowing us to quickly schedule time and prioritize focus.
- Mobile Access — The ConnectWise mobile app provides 24/7/365 remote access to everything from scheduling to documenting work.
- Third Party Software Integration — ConnectWise Manage enables third-party software integrations through ConnectWise MarketPlace.
- Customer Feedback — ConnectWise Manage collects customer feedback after the closure of every ticket to ensure high levels of customer satisfaction.

We will work with Golden Valley Charter Schools to customize ConnectWise access in a way that works best for your team, enabling you to see into our system and track our performance in real-time.

b. Provide a Clear Structure for Submitting Requests

We use a straightforward process for submitting and categorizing support requests:

- Creating clear guidelines for what information should be included in support requests
- Implementing an intuitive categorization system based on issue type and urgency
- Providing templates for common request types to ensure consistent information gathering
- Training Golden Valley Charter Schools' staff on how to effectively use the ticketing system
- Establishing service level agreements (SLAs) for different request categories

This structured approach ensures that issues are properly documented and routed to the appropriate support team members.

c. Ensure a Clear Escalation Process

Our escalation process ensures that issues are addressed by the right personnel in a timely manner:

- Defining a ticket Priority system based on Urgency (number of users affected) and Impact (effect on school operations)
- Establishing clear Performance Targets for response and resolution based on priority levels
- Creating automated notification rules for issues that require escalation
- Providing direct contact information for critical issues requiring immediate attention
- Regularly reviewing escalation patterns to identify areas for improvement

Our prioritization matrix typically includes:

- Priority 1 (Emergency): Affects whole school with major operations stopped
 - Response within 12 minutes, resolution plan within 1 hour, resolved within 6 hours
- Priority 2 (Critical): Affects large groups with significant operational impact
 - Response within 12 minutes, resolution plan within 4 hours, resolved within 8 hours
- Priority 3 (Normal): Affects small groups with workarounds available
 - Response within 12 minutes, resolution plan within 12 hours, resolved within 32 hours
- Priority 4 (Low): Minor issues with limited impact
 - Response within 12 minutes, resolution plan within 24 hours, resolved within 120 hours

This clear escalation framework ensures that critical issues receive immediate attention and are addressed by the appropriate technical resources.

4. Response Time

Timely response to technology issues is crucial for maintaining educational continuity. At Inspiroz, we establish clear, measurable response and resolution targets to ensure that Golden Valley Charter Schools' technology needs are addressed promptly and effectively. Our approach combines rapid initial response with systematic resolution processes.

a. Establish Clear Response Times

We implement Performance Targets (PTs) that define our commitments for addressing service requests:

- Initial response to all tickets within 12 minutes
- Priority-based resolution planning based on the urgency and impact of each issue
- Transparent tracking of performance against these targets
- Regular reporting on response time metrics
- Continuous improvement based on performance data

These Performance Targets will be customized based on Golden Valley Charter Schools' specific needs and agreed upon at the start of our partnership.

b. Define Emergency Response Protocols

For critical issues that could significantly impact school operations, we implement specialized emergency protocols:

- Immediate escalation of Priority 1 issues to senior technical staff
- 24/7/365 availability of our Network Operations Center and Service Desk
- Direct communication channels for emergency situations
- Established procedures for rapid deployment of resources when needed
- Regular testing of emergency response capabilities

These protocols ensure that critical systems are addressed promptly to minimize disruption to Golden Valley Charter Schools' operations, particularly during important academic periods such as testing or enrollment.

Our response framework is designed to provide not just quick acknowledgment of issues but also clear communication about resolution timeframes and progress. This approach ensures that Golden Valley Charter Schools' staff can plan accordingly and maintain confidence in the technology systems supporting their educational mission.

5. Cybersecurity

In today's increasingly complex digital landscape, robust cybersecurity is essential for educational institutions. Inspiroz provides comprehensive security services to protect Golden Valley Charter Schools' networks, systems, and data from evolving cyber threats while ensuring compliance with relevant regulations. Our Security Operations Center (SOC) works independently from our NOC and Service Desk to provide dedicated security monitoring and response.

a. Ensure Network, System, and Data Security

Our security team implements a multi-layered approach to protecting Golden Valley Charter Schools' technology assets:

- Conducting regular security audits to identify potential vulnerabilities
- Implementing continuous monitoring of networks and systems for suspicious activity
- Deploying advanced security tools including next-generation firewalls and endpoint protection
- Performing regular vulnerability assessments and penetration testing (twice yearly)
- Providing detailed security reports and recommendations

Our 24/7/365 Security Operations Center (SOC) uses advanced Security Information and Event Management (SIEM) solutions for comprehensive real-time threat detection and monitoring.

b. Implement Cybersecurity Best Practices

We apply industry-leading security practices tailored to educational environments:

- Deploying appropriate levels of anti-virus and anti-spam protection
- Implementing secure password policies and multi-factor authentication
- Applying content filtering in compliance with CIPA requirements
- Ensuring email security and phishing protection
- Establishing secure remote access protocols
- Managing backup processes according to best practices
- Ensuring appropriate physical security for network equipment

Our security approach is both proactive and adaptive, evolving to address new threats as they emerge.

c. Assist with Cybersecurity Policies and Compliance

We will support Golden Valley Charter Schools in developing and maintaining effective security policies:

- Helping create comprehensive cybersecurity policies and procedures

- Ensuring compliance with relevant laws and regulations (FERPA, CIPA, etc.)
- Assisting with incident response planning and documentation
- Providing guidance on data privacy best practices
- Supporting regulatory compliance reporting requirements

Our team stays current with evolving security standards and regulatory requirements to ensure Golden Valley Charter Schools's security posture remains strong and compliant.

These comprehensive security measures provide layered protection for Golden Valley Charter Schools' technology environment, helping to safeguard sensitive data and maintain operational continuity.

C. Cost

Inspiroz Structure for Golden Valley Charter Schools Partnership

Here is the structure Inspiroz will use for day-to-day support of Golden Valley Charter Schools:

- 24/7/365 Service Desk and Escalation Team -- Provides dispatching, remote support and troubleshooting escalation.
- 24/7/365 NOC -- Provides remote monitoring of network and infrastructure devices/connections, and alerts clients of outages according to custom escalation matrix created during onboarding.
- 24/7/365 Network Security Team -- Provides threat management by looking into client-specific platforms and dashboard.
- Technical Account Manager (TAM)/vCIO -- Provides primary account management and is the primary point of contact for your operations leaders, delivers strategy support, leads regular weekly or bi-weekly meetings, and leads quarterly or biannual strategic meetings.
- Service Delivery Manager (SDM) -- Accountable for Service Delivery success.
- Chief Education Strategist -- Works in partnership with Technical Account Manager, especially in the areas of software, applications and data.
- Emergency onsite support (i.e. Priority 1 – whole network down) if required is billed hourly at \$105/hour with a 2-hour minimum.

Cost for Network Management and Service Desk Support:

- \$3,250 per month (does not include cost for ConnectWise Streamline IT licenses, exact cost TBD but not to exceed \$50 per)

Cost for Cybersecurity SOC Services

- \$440 per month

Cost for Security Essentials Bundle:

- CrowdStrike Falcon Prevent Endpoint Detection and Response (EDR) for 60 devices
- Multifactor Authentication (MFA) for 110 users
- KnowBe4 Security Awareness Training – Diamond for 110 users
- Datto M365 Backup for 12 executive users
- \$570 per month

Additional items for consideration include the following:

Project Work and Setup Work

Our partners often take on significant work connected to new projects (migrations, decommissions, etc.) or setup (new computers/equipment, moves, new offices, etc.). These projects are out of scope and usually require additional or supplementary resources. As a result, there are additional fees, computed on an hourly or per device basis. These fees will always be pre-approved. Also, it's worth sharing that, based on our knowledge of fees used throughout the industry, we understand our fees to be very reasonable.

Subscriptions and Licenses

Any subscriptions not included in the Security Essentials bundle above are not included in our fee. If anything like this is required, we will be able to work with Golden Valley Charter Schools to determine the best and most cost-effective solutions.

Contract

Upon selection through the Proposal process, Inspiroz will provide a contract for review by Golden Valley Charter Schools. We typically operate with three year contracts with two year renewals. There is a 5% annual increase at the end of each year for multi-year contracts. Billing begins with the first day of onboarding. Additionally, our Contracts have a Performance clause which states that, "Services will be performed with a high-level of quality service, in accordance with industry standards and applicable law, and to the reasonable satisfaction of the Client." Termination can occur if there is a breach of the Agreement, including for violating the Performance clause.

D. Leadership Team Bios

Lars Beck, President and Inspiroz Co-Founder

Lars Beck co-founded Inspiroz with Milan Patel in November, 2016 with the aim that it become the leader of IT, ed tech and data support for charter schools. Prior to joining our team, Lars was the Founder and Chief Executive Officer of Scholar Academies, a charter management organization that focuses its work on the turnaround of low-performing schools. Launched in 2010, Scholar Academies currently educates more than 2,500 students across seven schools in Philadelphia, PA, Washington, DC, Trenton, NJ, and Memphis, TN. From 2005-2010, Lars served as the Chief Executive Officer of Scholar Academies' flagship school, Young Scholars Charter School. During this time, he directed the efforts that turned Young Scholars from a struggling academic program into Philadelphia's highest rated middle school.

Prior to his work in education, Lars spent more than 10 years working in the publishing, brand marketing and sports marketing industries in leadership roles. During this time, he was Founding Race Director and Partner for Philadelphia Triathlon, LLC; President of Advisory Publications; Founder and Executive Director of the Boulder, Colorado chapter of Stand Up For Kids; and a Director of Marketing and Marketing Manager for Labatt North America.

Lars is a member of the Aspen Global Leadership Network through the Pahara-Aspen Education Fellowship, was a participant in the inaugural Achievement First Charter Network Accelerator cohort, and is a member of Young Presidents' Organization (YPO). Lars is a graduate of Duke University, and lives in the Philadelphia area.

Karthik Chinnasamy, Technical Account Manager

After receiving his Bachelor of Engineering in India, Karthik came to the US to pursue his graduate degree in Information and Communication Sciences which he obtained from Ball State University in 2008. Soon thereafter, he joined Inspiroz as a Systems Administrator. Karthik's strong technical skills paired with a disciplined customer-oriented approach has led to consistent client satisfaction.

In his current role as a Technical Account Manager, Karthik serves as the primary strategic technology advisor for our charter school partners and excels at creating strategic technology plans that drive organization-wide success. Karthik brings a unique combination of technical expertise and educational technology knowledge, helping schools navigate complex decisions. He leads quarterly business reviews with school leaders, analyzing helpdesk metrics, security postures, and infrastructure needs to continually improve service delivery. His expertise in school-specific IT budgeting and effective coordination with E-rate consultants has helped our school partners maximize their technology funding.

Prior to his role as a Technical Account Manager, Karthik has successfully overseen hundreds of critical technology projects for charter schools, from standing up infrastructure in a new building to large-scale device deployments. As a strategic technology advisor, Karthik has earned a reputation for translating complex technical concepts into actionable roadmaps for school leaders. Through his leadership, schools have consistently improved their operational efficiency while maintaining cost-effective technology solutions that support their mission.

Matthew Peskay, Chief Education Strategist

Matthew is a leader in the fields of instructional and operational technology and operations in education. As the *Chief of Innovation, Technology and Operations* for KIPP SoCal Public Schools from 2009-2019, Matthew led innovations across both instructional and non-instructional school operations to provide safe, engaging and rigorous learning environments and experiences for all students, while reducing administrative burdens on teachers and administrators to foster deeper and more meaningful connections with students, families and communities. During his tenure, KIPP SoCal grew from 3 schools serving 500 students to 19 schools serving over 8,300 students.

Matthew holds a Master's degree in Philosophy and Education from Columbia University's Teachers College and has over 20 years of experience in increasing levels of technology and operations roles in K-12 and higher-ed education, as well as private and not-for-profit sectors, including the following achievements: Opening one of the first rotation-station blended learning models within KIPP (KIPP Empower Academy); Adopting Google Apps for EDU in 2010, influencing expanded adoption to multiple schools and districts across the U.S.; Participating in the Google Chromebook pilot program and becoming one of the first school districts to adopt Google Chromebooks; and Designing and implementing 'serverless' school network models focused on delivering high-bandwidth wireless services utilizing cloud-managed network component.

Milan S Patel, CEO and Inspiroz Co-Founder

Milan is a former E&Y "Entrepreneur of the Year" finalist and a current member of Young Presidents' Organization (YPO), the world's largest network of peers, connecting members to exchange ideas, pursue learning and share strategies to achieve personal growth and professional success. He was previously a member of the Young Entrepreneurs Organization (YEO), a dynamic, global network of more than 7,000 business owners in 38 countries which serves as the catalyst that enables entrepreneurs to learn and grow from each other, leading to greater business success and an enriched personal life. Milan is also a graduate of MBEP, The Minority Business Executive Program at Dartmouth's Tuck School and the "Birthing of Giants" program at MIT.

Milan graduated from Drexel University's Business and Engineering College and began his career journey with an internship at Amtrak. Upon graduation from Drexel, he joined Amtrak's Management Associate Program. He then got promoted to several positions where he was responsible for Program Management, Corporate Market Research, Forecasting, Budgeting & Mechanical Engineering.

He is a member of NFTE Philadelphia's Advisory Board. NFTE, the Network for Teaching Entrepreneurship inspires young people to succeed in school and in life by seizing educational opportunities and starting their own businesses. Milan is a dedicated family man with strong regional roots in Southeastern Pennsylvania and Delaware, and is a resident of Chester County.

Golden Valley Charter - TransformITive Proposal

TransformITive is a next-generation Managed Transformation Partner (MXP), bridging the gap between IT operations and strategic business impact. With over 15 years of experience across industries like architecture, construction, health care, legal, hospitality and education, we combine deep technical knowledge with boardroom-level advisory to help organizations modernize, scale, and thrive.

More than a traditional Managed Service Provider (MSP), our MXP model integrates long-term vision with daily execution—aligning technology strategy to core business goals, optimizing performance, and creating measurable results.

Together we'll accelerate your organization's Transformation initiatives and unlock the revenue trapped in your business.

Engagement Summary

Service Category	Monthly Cost	Details
Modern Workplace-Enterprise	\$6,929 (\$169 per user)	Seamlessly extends your internal IT with full Microsoft platform coverage, vendor and asset lifecycle management, 24/7 support for endpoints, infrastructure, and networks. Scales with growth and reduces overall operational complexity. Based on 41 users
Modern Workplace-Teacher	\$5,031 (\$129 per user)	Seamlessly extends your internal IT with full Microsoft platform coverage, vendor and asset lifecycle management, 24/7 support for endpoints, infrastructure, and networks. Scales with growth and reduces overall operational complexity. Based on 39 users
Modern Workplace-Student	\$980 (\$49 per user)	Seamlessly extends your internal IT with full Microsoft platform coverage, vendor and asset lifecycle management, 24/7 support for endpoints, infrastructure, and networks. Scales with growth and reduces overall operational complexity. Based on 20 users
Dedicated Onsite Support <i>Optional not in total*</i>	\$2,500	Onsite Service Technician 4 Hour onsite visit per week to address any outstanding issues not addressed by the remote team or for scheduled onsite work submitted through the Client Portal.
Total Monthly Investment	\$12,940	All-in pricing for a complete modern IT ecosystem with no hidden fees.

GVC Sample Roll Out

1	2	3	4
Phase 1	Phase 2	Phase 3	Phase 4
ModernWork	ModernWork	ModernWork	ModernWork
OneSolution	OneSolution	OneSolution	OneSolution
F1	F2	Security Assured**	Security Assured**
			MXP Program (vCIO) avail**

Projects:	Projects:	Projects:	Projects:
Fortify F1	Fortify F2		Fortify 3 & 4 Share Point

Phase Cost:	Phase Cost:	Phase Cost:	Phase Cost:
Program: \$	Program: \$	Program:	Program: \$
Projects: \$	Projects: \$	Project:	Projects & Add On's: TBD

Security Assured Program Overview

Fortify is our four-phase implementation designed to establish a secure, compliant foundation across identity, endpoints, data, and AI readiness. Each phase builds operational maturity and prepares GVC for continuous protection under our Security Assured Program (included).

F1: Identity & Email Hardening Secure access controls, MFA, admin roles, and mail routing \$2,500	F2: Device Protection & Visibility Deploy Intune, Defender, patching, and device compliance policies \$3,500
F3: Data Security & Access Control Implement DLP, sensitivity labels, and lifecycle protections \$TBD	F4: Copilot & AI Readiness Archive stale data, secure AI surface area, finalize governance \$TBD

Each phase completes in ~4–6 weeks and includes post-deployment validation and executive alignment.

Zero-Cost IT: Transforming Cost into Capability

Zero-Cost IT is more than a buzzword—it's a proven framework for converting IT from a cost center into a profit-driving capability. By outsourcing key operations and strategically aligning IT with business objectives, organizations unlock hidden ROI and sustainable efficiency.

For Golden Valley Charter, this begins with two quick wins:

Category	Savings Opportunity
Tool Consolidation	Up to \$8,000/month in savings by eliminating redundant IT and security platforms already covered by TX and unlocking Microsoft capabilities(broken down in next slide).
Operational Efficiency	Up to \$427,000/year in savings from staffing efficiency and workload automation via MSP partnership.

These early gains are only the beginning. As we unlock greater use of Microsoft-native features and streamline operational processes, Golden Valley Charter will be well-positioned to achieve compounding value across departments. A modern IT model that funds itself—and fuels your growth.

Comparative Cost Analysis

This analysis illustrates the financial advantages of partnering with TransformITive compared to expanding internal headcount. Through our co-managed program, we work alongside your existing team to deliver specialized expertise, reduce operational costs, and allow your internal resources to stay focused on what they do best.

Internal IT Scenario (300+ Users)

	Cost
Chief Information Officer	\$249,000/year
IT Director	\$170,000/year
Systems Administrator	\$110,000/year
Help Desk Technician	\$80,000/year
HR Overhead	\$82,215/year
Total Monthly Salary Cost	\$57,601.25
Essential IT Toolkit (Retail MRR)	\$8,150/month
Microsoft Licensing	TBD
Security & Compliance Tooling	TBD
Monthly IT Total	\$65,751.25
Yearly IT Total	\$789,015

TransformITive Comparison

Service	Cost
ModernWorkplace Enterprise (41 users)	\$6,929/month
ModernWorkplace Teacher (39 users)	\$5,031/month
ModernWorkplace Student (20 users)	\$2,750/month
Microsoft Licensing	TBD
Security & Compliance Tooling	Included
TransformITive Monthly Total	\$11,386
TransformITive Yearly Total	\$136,632

MSP Tool Stack Empowering our Program and Saving You Money

Purpose	Description	Competitor	Cost savings
Device Monitoring & Patching (NinjaOne)	We proactively keep every computer and server healthy with monitoring, patching, and alerts—fixing issues before they become outages.	Pulseway, Action1, atera, excel, email	\$5k/yr
Security Operations & Endpoint Protection (BlackPoint/Cylerian)	You get 24×7 threat monitoring and response plus modern endpoint protection on every device. Think of it as a digital security team watching and responding in real time—without you managing a separate SOC or EDR stack.	Bitdefender, Webroot, Malwarebytes Premium, McAfee	\$8k–\$15k/yr depending on # of endpoints and MDR tier
Identity, Device & Data Controls Microsoft EMS + Defender (Entra/Intune/Purview)	We unify sign-in, device management, and data protection across your organization. This consolidates multiple point products into one Microsoft-based layer for access control, compliance policies, encryption, and data loss prevention.	Google Workspace Admin, Okta Free Tier, Apple DEP, manual policy management	\$3k–\$6k/yr depending on number of devices and enforcement scope
Microsoft 365 Data Backup (Avepoint/Slide)	SaaS Backup for M365 Your email, OneDrive, SharePoint, and Teams data are automatically backed up. No extra backup software or storage to purchase—we handle it end-to-end so you can recover quickly from accidents or attacks.	No backup, relying on Microsoft’s retention policies; Synology NAS; DropBox sync	\$2k–\$5k/yr (lost time and partial data loss potential can be far greater)
Network Visibility (Auvik/Meraki)	We map and monitor your network in real time, so performance issues and bottlenecks are found and fixed fast. You get fewer surprises and faster root-cause analysis without standing up your own NMS tools.	Ubiquiti Insights, Netgear Insight, nothing at all	\$1.5k–\$3k/yr depending on network size and performance issues avoided
Help Desk & Communications (HaloPSA+Threads)	Your users get a simple portal to request help and track progress, and our team uses a shared inbox (Threads) to keep conversations organized and responsive. You don’t need to license or maintain your own ticketing or shared-inbox system.	Freshdesk Free Tier, Google Forms, Email-only support, manual tracking	\$3k–\$5k/yr depending on volume and downtime from lack of organized support
Documentation & Knowledge (IT Glue)	We securely document configurations, passwords, and procedures so any technician can help quickly and consistently. This eliminates tribal knowledge risk without you owning a separate documentation platform.	Confluence, Excel, Word docs	~\$1.5k–\$3k/yr (IT Glue licensing or internal labor cost to maintain documentation systems)
Asset Lifecycle & Vendor Management Lifecycle Manager (LMX)	We track warranties, device age, and renewals—and LMX helps us manage your vendors and contracts—so replacement plans and QBRs are data-driven. You avoid surprise renewals and scattered spreadsheets.	Excel, SharePoint lists, spreadsheets, vendor portals	~\$2k–\$4k/yr (time savings + avoided renewals, no standalone LMX license required)
Compliance & Audit Readiness (ControlMap)	We map your controls to common frameworks (e.g., SOC 2, HIPAA), collect evidence, and keep audit tasks on track—reducing the time and tools you’d otherwise spend to stay compliant.	Drata, Vanta, Tugboat Logic	~\$10k–\$20k/yr (cost of licensing Drata/Vanta, plus internal audit prep time)

**Cost savings estimations are just that - we'd be happy to work with you to ascertain your potential savings for cost recovery and optimization forecasting.*

ModernWorkplace

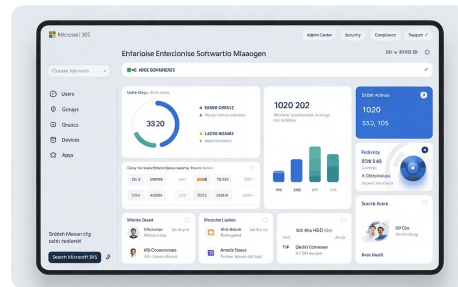
Your foundation for secure, scalable, and intelligent IT operations.

ModernWorkplace brings together the people, tools, and processes needed to simplify operations and deliver end-user satisfaction—while laying the groundwork for transformation. We capitalize on the untapped potential of Microsoft investments to unify infrastructure, improve collaboration, and reduce complexity.



24/7 Comprehensive Support

Round-the-clock assistance for endpoints, networks, infrastructure, and vendor management to ensure uninterrupted operations.



Microsoft Ecosystem Management

Expert licensing, tenant management, and optimization of your Microsoft investments to maximize value and capabilities.



Asset Lifecycle Management

Strategic procurement, maintenance, and replacement planning to keep your technology current and cost-effective.



Technology Enablement

Comprehensive training, documentation, and change management to ensure successful adoption across your organization.

Our approach is holistic—from support and security to adoption and enablement—ensuring every layer of your business technology environment works better, together.

Service Modules

Included in our your ManagedWorkplace Program.

TransformITive's service modules are purpose-built to extend operational coverage across your entire IT ecosystem. These capabilities are fully integrated into our model but are also available standalone for organizations needing targeted support. Each module delivers enterprise-grade tooling and 24/7 oversight, backed by deep domain expertise and measurable outcomes.

Module	Capabilities	Pre-Reqs	
Endpoint Management	• Device monitoring & support (Windows, Mac, Android, iOS) • Patch & issue management – Zero-touch provisioning (Autopilot/Intune) • Asset lifecycle tracking • Procurement support when purchased through TransformITive	• Intune Deployment Project • Autopilot Setup	
Network Management	• 24/7 monitoring of all network devices • Circuit & ISP management • VPN/SASE, remote access & traffic visibility • Network configuration backup & syslog collection • Intrusion prevention system monitoring • SNMP-enabled reporting • Cloud/hardware LAN controller management	• Network Management Portal • Intune Deployment	
Infrastructure Management	• Server (on-prem & cloud), hypervisor & database monitoring • Patch management & OS hardening • Voice/UCaaS (e.g., 8x8) oversight • Antivirus, malware protection & DNS threat scanning • Business continuity backup monitoring (BCDR) • Performance tracking: CPU, memory, storage, uptime	• BCDR Solution • SaaS Backup Readiness	
OneSolution Help Desk	• After-hours or 24/7 end-user support • Chat and ticketing portal (Teams/Slack integration) • Escalation management • Real-time dashboards and monthly performance reviews	• Support Platform Integration	
Security Assured	• Microsoft EMS, Defender, and compliance tooling • GRC platform, sensitivity labeling, conditional access • Policy automation and risk scoring • Framework support for CIS, NIST, and cyber insurance readiness	• Microsoft Licensing • SIEM or M365 Tenant Setup	

Add-On Modules

Advanced capabilities for organizations seeking deeper enablement and extended services.

These modules are available to enhance your IT environment beyond the CoMIT foundation. Whether you need deeper transformation planning, extended help desk services, or enterprise-grade security frameworks, these add-ons ensure scalable, compliant growth and continuous innovation.

Module	Capabilities	Pre-Reqs	Cost
MXP Program	• vCIO engagement with strategic planning, technology roadmapping • OKR management and initiative delivery • Budget forecasting and vendor coordination • Executive-level transformation leadership	• CoMIT subscription • Minimum 2-quarter term	\$15,000/quarter (paid monthly)
Dedicated Onsite Support	• 4 Hour onsite per week • Designed to provide help with outstanding issues not addressed by remote team • Scheduled in advance through client portal.		\$2,500/mo

Project Management Approach

We deploy a structured 5-phase implementation plan designed for alignment, adoption, and speed:



Discover

Define success factors, map stakeholders



Define

Build strategic roadmap, configure systems



Migrate

Execute secure, low-disruption cutovers



Deliver

Train, validate, and reinforce adoption



Deploy

Postmortem, iterate, and evolve

Service Management Standards

Our ITIL-aligned framework ensures reliability, security, and accountability:



24/7 Incident Response



Root Cause & Problem Resolution



Controlled Change Management



Role-Based Access & Offboarding



Configuration & Asset Visibility



Encrypted Vaults & Credential Management



Structured Onboarding/Offboarding Workflows

Your MXP Team

Your dedicated team will be led by Joe Markert, CEO of TransformlTive, with 25+ years of experience guiding organizations through digital transformation and technology adoption.



Joe Markert
Founder & CEO

25 years in Technology Consulting, Product, Program, & Application Design & Development. Business Transformation Specialist



Cary Warner
Chief Operating Officer

25 years' experience guiding cross-functional teams in the development and commercialization of innovative technology services and solutions.



Robby Prochnow
Chief Revenue Officer

11+ years leading revenue, product, and channel growth with executive roles at GoDaddy, TD Synnex, and Avnet. MBA.



Adam Scior
Director of Client Services

20+ Years of network and systems experience

Voice migration and call center specialist



Kody Foringer
Client Success Manager

5+ years in Website Management, Automation, and Client Success

Enterprise IT & Field Account Management (Fortune 500s)



Grant Benson
Security Program Manager

17 Years as engineering project specialist

Expert in systems administration and general engineering in Windows environments, Linux, storage and DevOps.



Oskar Ramirez
Change Management Consultant

25 years of private sector & military experience in planning, operations to leadership training. Extensive experience in leading worldwide employee operational planning & deployment logistics.



Mia Tait
M365 Platform Specialist

Mia has completed over 200 SharePoint and M365 deployment projects for organizations of every industry and size. Mia drives all project considerations focusing on strategy, structure, development, training and change management



Joe Markert

CEO, brings executive-level insight and ensures project alignment with business goals



Mia Tait

Leads technical design and system configuration, tailoring SharePoint and Teams to your organization's structure



Adam

Ensures seamless communication, manages expectations, and keeps the project on track



Robby

Facilitates collaboration and stakeholder engagement to ensure TransformlTive delivers long-term value



Oskar

Leads staff adoption efforts, ensuring smooth transitions through tailored communication and training strategies



Grant

Ensures the solution is implemented with robust security standards and data protection protocols to maintain client trust

Together, our team brings the strategic insight, technical know-how, and stakeholder engagement required for successful implementation and adoption.

Clarifications

The following responses address cover common inquiries and future ones from Golden Valley Charter, providing detailed clarity on our qualifications, service delivery model, and approach to long-term value creation. Will be updated as conversation progress.

Years in business?

TransformITive was founded in 2007 (originally as FunctionOne) and has since evolved into a national leader in Managed IT and Strategic Advisory services. With over 18 years of experience, we've delivered results for organizations across construction, architecture, legal, and commercial services. Our rebrand to TransformITive in 2021 reflects our deeper focus on transformation, not just management.

Certifications & staff screening?

All staff are background-checked, and our technical team holds certifications in Microsoft 365, Azure, Intune, Microsoft EMS, and more. Our leadership team is ITIL-certified, and we maintain an internal professional development policy to ensure ongoing training and skill advancement. Security, integrity, and expertise are foundational to our team makeup.

Company certifications or experience?

Trusted by Microsoft, Intel, Synnex, Top Down Ventures, and others. Regular speakers at industry events and peer forums.

Financial stability & viability?

65% recurring revenue from managed services. Forecasting 30% YoY growth in FY25 with 14% EBITDA.

Service Management processes?

Strategic alignment, Transformation Readiness assessments, goal mapping (OKRs), and three-tiered engagement: tactical, strategic, and transformational.

Onboarding/offboarding process for Golden Valley Charter?

Automated, role-based workflows with forms-based intake. Includes licensing, access provisioning, device imaging, deactivation, audit, and optional HR integration.

Recent IT co-management examples?

Tegsco (AutoReturn), now VMS—national expansion, M&A integration, security audit, and full-service technology strategy.

Support for remote users?

Yes—mobile, jobsite, and remote site support included. Optional dedicated or staffed onsite smart hands available.

Software tools used?

HaloPSA, NinjaOne, ITGlue, Lifecycle Manager X, Auvik, Microsoft EMS + Defender, ControlMap, Threads, Quoter, QuickBooks, etc.

AV, firewall, wireless support?

Covered via Security Assured (AV) and Infrastructure Management (network/wireless).

Asset & license tracking?

Lifecycle Manager X + shared documentation. Quarterly reviews and renewal calendar.

Help desk differentiators?

Our help desk isn't just reactive—it's integrated into your workflows. We offer Teams/Slack integration, ticket submission via portal or chat, and advanced routing powered by AI and contextual history. Our OneSolution desk is tailored to your support needs, ensuring rapid resolution, strong communication, and visibility into support performance through dashboards and monthly reviews., real-time metrics, AI-assisted routing, and fast, context-driven support.

Reporting & review frequency?

SLA reports, system health, compliance scoring, and project dashboards. Reviewed monthly or quarterly.

Procurement process?

Full procurement lifecycle included in CoMIT. Product quotes, fulfillment, tracking, and disposal.

EDU and Board Expertise

Robby lead 23K student device deployment for Dallas ISD.

Local support presenting to the board via Cary

Cloud directory & remote deployment?

Intune + AutoPilot enable zero-touch deployment, remote management, and conditional access enforcement.

Why TransformITive?

We're more than a provider—we're a partner.



True Partnership

We act as an extension of your team, aligning our expertise with your goals to deliver solutions that truly fit your organization.



Modernize with Confidence

Our modular approach helps organizations like Golden Valley Charter embrace new technologies while minimizing disruption to your core business.



Operational Excellence

From frontline support to strategic leadership, we deliver transformation with every engagement, helping you scale smarter.



Industry Recognized

We help define our market! Trusted by top MSP vendors to consult around methodology, product design, and market strategies.

We look forward to the opportunity to help Golden Valley Charter scale smarter through technology.



STUDENT BEHAVIOR POLICY STUDENT CODE OF CONDUCT

(Board Approved March 13, 2019) (Revised TBD)

Golden Valley Charter School is committed to creating a safe and nurturing learning environment for every student. We are equally committed to helping our students grow into healthy, happy, responsible adults. In order to respect, care for and work with others; students must learn to truly love and respect themselves.

It is our goal that all students possess a clear understanding of how their actions affect others. When a student acts in thoughtless or harmful ways, the entire community suffers. Our goal is to discourage misbehavior and encourage the student to do better in the future. Our approach emphasizes compassion, consistency and responsibility.

The Student Behavior Guidelines for Golden Valley Charter Schools are based upon a philosophy of respect and adherence to California State Education Code (particularly Sections 48900 through 48915, and 48918 where applicable 48908):~~California State Education Code (48908):~~

Student Behavior Guidelines

In order to provide a school environment that fosters cooperation, responsibility and respect; students will be expected to follow these guidelines:

1. Students will support a positive learning environment. —Students are expected to do their best and cooperate with teachers and classmates. This includes, but is not limited to, quietly focusing their attention on the teacher when asked to do so, completing class assignments, observing class starting and ending times, completing classroom chores, and follow directions when requested to do so.
2. Students will treat all adults and students with respect. —Respectful, courteous language is expected towards teachers, students and parents. Inappropriate behavior such as rudeness, teasing, mimicking, unkind or inappropriate words, swearing, physical or emotional threats, sexual harassment, and lying are not permitted. Students are expected to comply whenever an adult or a student asks for an inappropriate behavior to stop.
3. Students will treat all personal and school property with respect. —Lost, stolen, defaced or destroyed property will be repaired or replaced by the parents of those responsible.
4. A “gentle hands” policy will be followed. —Rough housing, fighting, shoving, spitting, pushing, hitting, kicking or biting is cause for immediate intervention.
5. Students will obey all classroom and playground rules. —Teachers will help their students understand and integrate the school-wide behavior policy into their daily activities. Additionally, individual teachers may have unique expectations, which they will communicate to their classes. Teachers will develop a class management system, approved by the administrator, and appropriate to the age level of their individual class.
6. Parental concerns about the implementation of this policy shall be shared directly with their student’s teacher.
7. Due to FERPA Privacy Laws, school personnel are unable to discuss other students’ behaviors with parents.

8. Please refer to the Bullying Prevention Policy and Plan for further information regarding bullying prevention and reporting, including use of the Bullying Incident Report.

8.9. Restorative and trauma-informed practices will be utilized where appropriate as a first means of correction, in alignment with Education Code 48900.5.

Consequences for Misbehavior:

At all Golden Valley Schools, consequences for misbehavior begin in the classroom. Repetitive misbehavior will initiate increasing consequences that will involve student, parent, teacher and additional personnel, as needed. Below is an outline of the process from classroom management to expulsion. These procedures will be followed based on the severity of the infraction and the teacher and/or principal's evaluation of the circumstances. **Please note that some actions are grounds for immediate suspension or expulsion (see list below).**

1. Classroom Management for Student Behavior

Setting Expectations

At the beginning of each school year each teacher will communicate their class management plan with parents at the first parent meeting. Additionally, a written copy of the class expectations for Special Subject Specialty classes will be distributed to all parents.

Consequences for Misbehavior:

At this level, misbehavior will be dealt with according to the teacher's class management plan.

In the event that individual class management systems are not sufficient to correct disruptive or disrespectful behavior, the student will progress to the next step.

2. Referral and Parent-Teacher Conference

Referral

If a student fails to follow the school or classroom behavior guidelines or in any way undermines a healthy learning environment, endangers himself, others or property, a Referral ~~-(Student Behavior Report and Action Plan)~~ may be sent home with the student describing this behavior. The teacher will follow this up with a phone call, email, or ParentSquare message -to the parents and letting them know to expect a referral from their student.

The parents and student will discuss the situation and assist the student in developing a plan to correct the behavior. The signed notice will be returned to the teacher the following day.

~~The parents and student will discuss the situation and the parents will assist the student in developing a plan to correct the behavior (see Referral Form). It is suggested that a student who receives a referral is given a consequence for it at home. The signed notice will be returned to the teacher the following day. It is the parents' responsibility to see that the student returns this signed referral to the school the following day. Either the parent or the teacher may request a telephone or personal conference.~~

Parent-Teacher Conference

When a student receives two referrals, the teacher will schedule a parent-teacher conference. Restorative practices, counseling, or other means of correction will be discussed.

~~When a student receives two referrals, the teacher will schedule a parent-teacher conference. If both parents and teacher agree, the student may be included in the meeting. Student participation is encouraged, when appropriate. A behavior plan may be developed at this time. The teacher or parents may request the principal be present. Parents may request that other individuals be present at the conference.~~

3. Suspension

Suspensions will be imposed only when other means of correction fail to bring about proper conduct, in accordance with the Suspension & Expulsion policy and as required under Ed Code 48900.5.

The duration of suspension will depend on the severity and nature of the behavior in accordance with Ed Code 48911.

The school will not suspend students in grades K–8 solely for "willful defiance," consistent with Ed Code 48900(k) and subsequent amendments.

~~Upon receiving a third, sixth and ninth referral, a student may be suspended from school. The first suspension will be one day, the second suspension may be from 1–3 days and the third suspension may be from 2–4 days long.~~

~~In the interest of maintaining a safe and courteous environment, certain behaviors will not be tolerated and may result in an immediate suspension (California Ed Code 48900). These behaviors are:~~

- ~~● Causing, attempting to cause, or threatening to cause physical injury to another person.~~
- ~~● Willfully using force or violence upon the person of another, except in self-defense.~~
- ~~● Attempting, threatening to cause or participate in hate violence.~~
- ~~● Willfully and knowingly making a terrorist threat against the school.~~
- ~~● Possessing, selling or otherwise furnishing any firearm, knife, explosive or other dangerous object.~~
- ~~● Possessing an imitation firearm.~~
- ~~● Possessing, selling or otherwise furnishing, or being under the influence of any controlled substance, an alcoholic beverage or an intoxicant of any kind.~~
- ~~● Unlawfully offering, arranging, or negotiating to sell any controlled substance, an alcoholic beverage, or an intoxicant of any kind, and then either selling, delivering or otherwise furnishing to any other person a liquid substance, or material and representing the liquid, substance, or material as a controlled substance, alcoholic beverage or intoxicant.~~
- ~~● Unlawfully possessing or unlawfully offering, arranging, or negotiating to sell any drug paraphernalia.~~
- ~~● Committing or attempting to commit robbery or extortion.~~
- ~~● Causing or attempting to cause damage to school property or private property.~~

- ~~Stealing or attempting to steal school property or private property while on school grounds.~~
- ~~Knowingly receiving stolen school property or private property.~~
- ~~Possessing or using tobacco or any products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets, betel, e-cigarettes, vape pens, etc., exclusive of physician's prescriptions.~~
- ~~Committing an obscene act or engaging in habitual profanity or vulgarity.~~
- ~~Disrupting school activities or otherwise willfully defying the valid authority of supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties.~~
- ~~Committing or attempting to commit a sexual assault or committing sexual battery.~~
- ~~Committing an act of sexual harassment. Sexual Harassment is defined as unwelcome sexual advances, requests for sexual favors, and other verbal, visual, or physical conduct of a sexual nature (California Ed Code 212.5)~~
- ~~Harassing, threatening or intimidating a pupil who is a complaining witness or witness in a school disciplinary proceeding for the purpose of either preventing that pupil from being a witness or retaliating against that pupil for being a witness, or both.~~
- ~~Engaging in or attempting to engage in hazing, as defined in California Ed Code 48900~~
- ~~Engaged in an act of bullying, defined as severe or pervasive physical and verbal acts or conduct, including written or electronically transmitted material, which can reasonably be predicted to have the effect(s) of: fear of harm to person or property, detrimental effects on physical or mental health, interference with academic performance, and interference with the ability to participate in or benefit in the services, activities, or privileges provided in school.~~

~~If a student is suspended, the parents will be informed by telephone and will receive a formal notice of suspension.~~ The student may return to school after a suspension once a follow-up SST meeting with the teacher and/or administrator stipulating the conditions of the student's return has taken place. During this meeting a behavior plan may be developed.

Student Success Team (SST) Meeting

~~At any time the teacher deems it necessary or in accordance with the Student Behavior Policy, upon a third referral, an SST Meeting will be convened to support the student and their needs.~~ The meeting will consist of the student's parents, classroom teacher, administrator, as well as other teachers and support staff, if needed. The team will work to cultivate healthy classroom, playground, and social behavior. During this meeting a behavior plan may be developed. Parents will be notified in writing at the meeting that should a third suspension occur, expulsion may be recommended.

Special Needs Students and Suspension

~~Suspension shall be imposed only when other means of correction fail to bring about proper conduct. However, a pupil, including an individual with exceptional need, as defined in Section 56026 of the CA Ed Code, may be suspended for any of the reasons enumerated above upon a first offense, if the principal determines that the pupil violated one of the above items.~~

4. Expulsion

Should the above steps and due process not prove to correct the student's behavior expulsion may be recommended. Students have the right to an expulsion hearing, representation, presentation of evidence, and appeal, per Ed Code 48918 and in accordance with the Suspension & Expulsion policy.

~~Should the above steps and Due Process not prove to correct the student's behavior after 3 suspensions, expulsion may be recommended.~~

~~Due Process Summary Behaviors and Interventions~~

1. First referral: Phone call to parent from the teacher
2. Second referral: Phone call and parent-teacher conference
3. Third referral: Phone call home from administrator and SST meeting is scheduled
4. At SST Meeting: Parents and school will develop a plan and identify any necessary interventions that the student may need
5. Subsequent referrals: Continued documentation, interventions, and SST meetings as needed
6. Restorative and non-punitive strategies will be applied at every reasonable step prior to suspension or expulsion recommendation.

Below is a summary of the steps that may be taken prior to a recommendation for expulsion:

1. First referral: Phone call to parent
2. Second referral: Phone call and parent teacher conference
3. Third referral and suspension: Phone call home and SST meeting is scheduled
4. At SST Meeting: Parents will be notified in writing that a 3rd suspension may result in a recommendation for expulsion.
5. Fourth referral: Phone call home
6. Fifth referral: Phone call and parent teacher conference
7. Sixth referral and suspension: Phone call home. SST follow-up meeting is scheduled
8. At SST Meeting: Parents will be notified in writing that a 3rd suspension may result in a recommendation for expulsion.
9. Seventh referral: Phone call home.
10. Eighth referral: Phone call home and parent teacher conference
11. Ninth referral and/or 3rd suspension: Recommendation for expulsion

~~In addition, there are certain situations in which Mandatory Expulsion is required (Ed Code 48915). They are listed in the Code as follows:~~

~~"The principal or designee must immediately suspend and recommend a student for expulsion and the School Board of Trustees must expel for:~~

~~1.——Possession, as verified by a district employee, sale or furnishing a firearm, unless the student has written permission from a certificated employee with the principal or~~

~~1.——designee's concurrence.~~

~~2.——Brandishing a knife at another person.~~

~~3.——Sale of drugs.~~

~~4.——Committing or attempting to commit sexual assault or battery.”~~

Clearing Referrals Referral and Records

Referrals are cleared year to year. Suspensions are cumulative from year to year and are part of a student's cumulative file. Disciplinary records will be maintained in accordance with FERPA and California Education Code requirements.

~~Referrals are cleared year to year. Suspensions are cumulative from year to year and are part of a student's cumulative file.~~

I (We), _____ have read and reviewed the Golden Valley Charter School

Student Behavior Policy and Procedures with my (our) student: _____

Comments:

Parent Signature

Date

Orchard School Board Report, November
By Jennifer Evans, Faculty Chair

It's progress report time and all teachers are busy grading and completing our extensive look into each child and expressing their achievements. Eagle Chase was a huge success, and the students gave it their all. Several faculty and staff were running with the students in support. The kindergarten parade was so cute. We had a great parent turn out. Shout out to Baobab Tree parents and all the other parents, family, and friends who helped make this a success. Seventh grade finished their age of exploration reports and held an interactive showing in the MP room for all to come and see. The students were so knowledgeable and presented their reports in various ways. Some did presentation boards, others dressed up as the person they studied and gave an oral presentation, and some did wood burnings with descriptions. The artwork was incredible, and one student built a replica of a space shuttle. This was a great way to show UDL in our school. We have a great team of teachers, staff, and support staff at Orchard. I am grateful for you all.

River School Board Report, November
By Tavia Pagan, Faculty Chair

By the time this is published, the annual Kindergarten Lantern Walk will have taken place. This is always such a magical event, and the kindergarten team had extra support from the community this year in the form of Miss Lynn! It is wonderful to have community members who are not in an active role in our day-to-day happenings still so invested in the work and potential of Golden Valley River School.

Another member of our community and an elder in the Waldorf community itself, Lee Sturgeon Day, is being called upon to offer her expertise in biography work. I have asked her to provide guidance and a reminder of why we chose to be here in this place at this space in time. Lee brings wisdom in the realm of biography work and I am confident that she will help to start us on a path to bring back an overarching mood of reverence and to renew and strengthen a feeling of community within the faculty.

Collectively, the faculty continues to feel a lack of support. Mentoring and guidance is needed on a deeper level for every faculty member. This will help us to be closer to working on the same page and striving forward in the same direction. Speaking with other veteran faculty members, there has been a palpable shift in the culture of our school. We would like to feel consistent support and trust from the administration. Again, the need for regular, consistent mentoring and training in Waldorf pedagogy is crucial to the future success and stability of our organization.

On a brighter note, the Festival of Light will be held the evening of November 13th from 5 to 7 PM here at the River Campus. The middle school classes have prepared food and drink to offer as fundraisers toward their 8th grade trips and will appreciate the community's generous support. Everyone is welcome to bring a photo of a loved one who has passed to the community ofrenda. The ofrenda will reside in the MP Room for the week after the festival, to allow the whole community to enjoy this joyful celebration of ancestors with reverence and love. Every class is offering an activity to bring light as we approach the darkest time of the year. I hope to see you there!



November 12th, 2025

Dear Golden Valley Community,

As the days grow shorter and the light fades earlier each evening, we are reminded of the deep wisdom within the rhythms of the seasons. November calls us inward- to reflections, gratitude, and the gentle tending of our inner light. This month, our community has beautifully embodied this spirit through two cherished Waldorf traditions: The Lantern Walks and the Festival of Lights.

Lantern Walks are held across our kindergarten and lower grades, were once again the heartwarming expression of community and reverence. Watching our children carry their handmade lanterns- each glowing softly against the darkening sky- reminded us that every light, no matter how small, brings warmth and hope to the world around it. We extend our heartfelt thanks to the teachers and parent volunteers who prepared the lanterns, guided the songs, and created such a nurturing atmosphere for this beloved event. Your care and presence allowed our students to experience both the beauty of nature and the joy of shared celebrations.

Festival of Lights, as we move toward the winter season, we also prepare to celebrate the Festival of Lights, a time when our entire school gathers to honor the many ways cultures around the world kindle light during the darkest time of the year. Through stories, music, and symbols from diverse traditions, our students learn that the light we carry —in our hearts, our homes, and our actions —connects us to one another and to the greater human family. We look forward to seeing many of you at this radiant event this month.

These festivals are more than school events; they are living experiences that nurture our children's sense of wonder, gratitude, and community. They remind us all that education in the Waldorf tradition is not only about learning facts but about cultivating the inner life that gives meaning and purpose to our days.

On behalf of the Board of Trustees, we thank everyone of you- faculty, staff, parents, and friends- for keeping the light of our school shining brightly. May this season bring peace, reflection, and warmth to you and your families.

With gratitude and light,

Katie Gerski-Keller
Board of Trustees, Chair
Golden Valley Charter School

Meredith Willsen
Board of Trustees, Vic Chair
Golden Valley Charter School



GOLDEN VALLEY CHARTER SCHOOLS

EXECUTIVE DIRECTOR REPORT

Submitted by Jennifer Hoover, Interim ED

November 12, 2025

K-8 Tuition-Free Public Waldorf Schools

THE CHARTER MANAGEMENT OFFICE

As we gather for our November Board meeting, I want to take a moment to express gratitude for the continued dedication of our Board, leadership team, faculty, and staff. The rhythm of the school year is well underway, and it has been inspiring to see our students deeply engaged in their learning and our schools thriving as communities of connection and creativity. This time of year always brings reflection and appreciation for the collaborative efforts that sustain our schools – from the thoughtful guidance of this Board to the daily work of our teachers and support staff.

Leadership met with Frank Camarda, Chief Operations Officer at San Juan Unified School District (SJUSD), to discuss both immediate and long-term facility needs for our school sites. A primary focus of the conversation was the installation of a security gate at the front of Orchard to enhance safety and security for all students and staff. The district was supportive of this request and anticipates that the gate can be installed by summer 2026.

In addition to immediate facility improvements, we also discussed pursuing modernization projects at both Golden Valley school locations. These projects would utilize state bond funds, with SJUSD providing matching funds for the modernization work at each campus. This initiative will help ensure our facilities continue to support a high-quality, Waldorf-inspired learning environment.

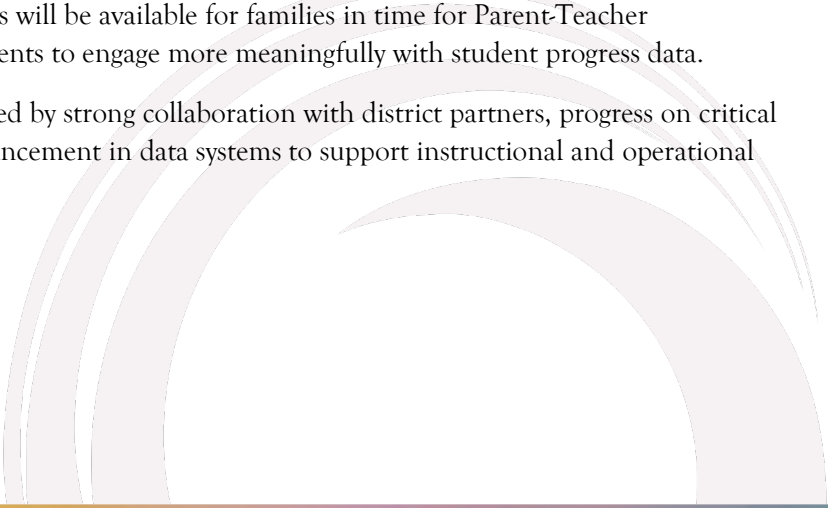
Golden Valley has completed and submitted the annual Proposition 39 Facilities Request to SJUSD. We also participated in our annual district oversight meeting, which provided an opportunity to review academic, financial, and operational performance.

During this meeting, we discussed the upcoming River School charter renewal, which is planned for submission between September and October 2026. The district shared that they will be implementing a self-reflection rubric for charter schools, utilizing the same framework used to evaluate charter petitions. This tool will support a reflective and transparent renewal process.

The district expressed that they are pleased with Golden Valley's current operations,

Our partnership with Parsec continues to progress well. The company is currently building out the Golden Valley data dashboards, which will allow for enhanced data visualization and school-level analytics. We are optimistic that student-level data reports will be available for families in time for Parent-Teacher Conferences, allowing teachers and parents to engage more meaningfully with student progress data.

Overall, the past month has been marked by strong collaboration with district partners, progress on critical facilities initiatives, and continued advancement in data systems to support instructional and operational excellence.



ORCHARD -

School Safety

The Orchard faculty has been engaged in ongoing conversations about school safety, emphasizing the need for continued diligence in upholding our established policies and procedures. This includes ensuring that all volunteers and visitors are cleared through the office, that all employees know how to appropriately direct any adult who is not signed in to the office, and that we consistently follow our locked-door procedures.

At the end of October, Mrs. Hoover and I met with the San Juan Unified facilities lead to discuss several important safety and maintenance improvements. The top priority identified is the installation of proper fencing and a secure gate at the front of the school. This project will require district approval before work can begin, but we are encouraged by the collaboration and early discussions. Additional requests include the installation of a release-bar gate near the multipurpose (MP) room, a comprehensive tree assessment across campus, and continued attention to campus upkeep to ensure our facilities remain in good repair.

In the meantime, we continue to emphasize proactive safety practices across the faculty, including maintaining locked doors, reinforcing front office protocols, and ensuring staff visibility during student transitions and recess. These daily habits form the foundation of a secure and predictable environment for students and staff alike.

Food Scarcity and Family Support

Orchard School is in the process of setting up supports for families who may be experiencing food scarcity. We are developing an ongoing food drive to provide assistance throughout the school year. Families in need are encouraged to reach out to their class teacher, who will maintain confidentiality while connecting them with available resources.

In the short term, any family is welcome to pick up leftover food from our school meal program before 3:30 p.m. in the MP room. Additionally, the Orangevale Food Bank continues to serve residents of Orangevale, Fair Oaks, Folsom, and Citrus Heights on the following schedule: Monday 11:00 a.m.–1:00 p.m., Wednesday 4:30–6:30 p.m., and Thursday and Friday 10:00 a.m.–12:30 p.m. Details about eligibility are available at ovfofb.org/hours-eligibility. Families can also locate nearby resources through the Sacramento Food Bank's online food finder at sacramentofoodbank.org/find-food.

Seasonal and Community Highlights

As we move through November, the school community is preparing for several seasonal traditions and classroom celebrations that align with the rhythms of the Waldorf curriculum. Students are engaging in autumnal crafts, gratitude projects, and early winter preparations that foster a sense of connection and reflection. Teachers are also finalizing report cards and preparing for parent-teacher conferences, which offer a meaningful opportunity for family engagement and shared understanding of student growth.

We remain deeply appreciative of the dedication of our faculty and staff, whose care and collaboration continue to nurture a safe, supportive, and joyful learning environment for all students.

RIVER –

As the crisp autumn days settle in and we turn toward the season of gratitude, our virtue for the month of November is, **Thankfulness**. In Waldorf education, we see gratitude not just as a fleeting feeling, but as a daily practice—a way of seeing the world with reverence and appreciation. When we are thankful, we awaken in ourselves and our children a sense of connection and joy for what is, rather than what is missing.

November is always an extraordinarily busy time of year. Teachers are finishing up their first trimester report cards and preparing for parent/teacher conferences. Students are hard at work in their main lesson books, country reports, 8th grade projects, and class plays. We are so excited for the upcoming Festival of Light. During a time when the days are growing shorter and darker, this festival brings in the light with food, music, crafts, storytelling, and community.

In our classrooms, this month's lessons, songs, and stories will reflect this mood of gratitude—gratitude for the natural world, for friendship, for learning, and for the community that surrounds us. I encourage you to bring this spirit into your homes as well. There is a permanence to gratitude that sets it apart from the rest. All other feelings and emotions have an ephemeral quality that changes due to happenstance. Gratitude for life, love, humanity, and community stays with us like a gift that keeps on giving.



Enrollment and Attendance – Orchard				
	2025-2026	Month 3 ADA	Movement	25/26 Budget Assumptions
TK	30	94%	0	
K	30	94%	0	
ABK	20	TK:91%/K:96%	0	
OBK	20	TK: 95%/K:95%	0	
MBK	20	TK:96%/T:92%	0	
1	28	96%	+1	
2	42	94%	0	
3	45	94%	0	
4	28	94%	+1	
5	31	95%	0	
6	29	92%	(-1)	
7	28	96%	(-1)	
8	20	96%	0	
Total	11/01/2025	Month 3 ADA Total 94%	311	

Enrollment and Attendance – River				
	2025-2026	Month 3 ADA	Movement	25/26 Budget Assumptions
TK	38	89%	+3	
K	44	90%	+2	
CBK	20	100%	0	
LBK	20	TK:89%/K:84%	0	
PBK	20	TK:89%	+3	
SBK	22	K:93%	+2	
1	47	96%	0	
2	32	96%	0	
3	30	96%	0	
4	27	95%	(-1)	
5	27	97%	(-2)	
6	30	97%	0	
7	24	97%	0	
8	20	93%	0	
Total	11/01/2025	Month 3 ADA Total 95%	319	

Enrollment – We have recorded Parent Information Meetings available for prospective families to watch as well as scheduled in person meetings. We will continue to accept applications and make offers for enrollment when there is an open seat in a class.

Applications for Enrollment for the 2025-26 school year will continue to be accepted. We currently have no more Parent Information Meetings for the 2025-2026 school year. We have scheduled our Open Enrollment Parent Information Meetings for the 2026-2027 School year for January and February 2026 and they are posted on our website.

Current waitlist for the Orchard School as of 10/02/2025:

TK: 12

K: 9

Current waitlist for the River School as of 10/02/2025:

TK: 16- We had exhausted the waitlist, so a lottery was generated for submitted applications, and a new waitlist was created.

TK: 2: 3

K: 4: 1

Marketing, Communications & Outreach

- **Focus:** Highlighting the daily life and vibrancy of Golden Valley Charter Schools on social media, demonstrating an engaged and connected community.
- **Actions:**
 - Active social media posting with glimpses (“windows”) into school life

Communications

- **Community:**
 - Will have an engagement table with school swag, brochure, information to be involved at the Festival of Light on 11/13/2025
 - Gala & GVEF mixers for recruitment and for adults to mingle. Next one is 11/18/25.

Development

Annual Giving Campaign

- Messages out in Newsletters
 - “Earnie the Eagle” (felted mascot) will go to the next class who has increased their participation in the campaign
 - November is a time for the “why I Give” campaign and connecting and sharing stories about those who impact our community with time, treasure and talent. break from AGC communications to lend communication focus to the GVEF fundraiser Eagle Chase.
 - The stories will be shared Dec 1 for the week of giving on social media and ParentSquare

Fundraising with GVEF

- **GVEF Meeting (11/4):**
 - GVEF meets first Tuesday night on zoom
 - Eagle Chase Fundraiser raised \$101,000.
 - A communication repost out is on the GVEF Facebook page
 - A more through report out will go out on ParentSquare
- **Regular Meeting scheduled for Dec 2**
- **Membership Mixer:** One coming for November. Need more members.
- Gala Committee formation and Sponsorship work is in progress.

SCHOOL	Donors/enrollment	YDT Received	Projected AGC Receivables	Goal
GVOS	109/312	\$15,511		\$75,000.00
GVRs	154/319	\$28,472		\$75,000.00
General Donation	n/a	\$1500		
TOTAL	263/631	\$45,483	\$90,000	\$150,000.00