

Forest Charter School

470 Searls Avenue
Nevada City, CA 95959

Monthly Charter Council Meeting Agenda

November 4, 2025

5:05 p.m. Regular Session
470 Searls Avenue, Sequoia
Nevada City, CA 95959
Network User ID: FC_Public
Network Password: PineCedar2

10725 Pioneer Trail # 201, Truckee, CA 96161
23221 Foresthill Road, Foresthill, CA 95631
11952 Masters Court, Auburn, CA 95603

Dan Thiem, Chair Amber Baker, Parent Representative Makala Clinton Parent Representative Amea Medeiros, Parent Representative Gabriella Stockdale, Parent Representative Tita Fowler, Secretary

Join the Meeting via Zoom:

<https://us02web.zoom.us/j/85408398614?pwd=Y2dzdFBFUXdQTUFxazI3bERnZGIYUT09>

Meeting ID: 854 0839 8614

Passcode: 873378

Dial by your location

+1 408 638 0968 US (San Jose)

Meeting ID: 854 0839 8614

Find your local number: <https://us02web.zoom.us/u/kb7yu4OPaF>

AGENDA:

1. Call To Order
2. Roll Call
3. Information/Action: A, B, C, and D may be considered for Consent Agenda--Meshawn Simmons
(E-Attachments)
 - Shall the Consent Agenda be approved?
 - A. Adoption of the November 4, 2025, Meeting Agenda
 - B. October 14, 2025, Charter Council Meeting Minutes (page 4)

- C. Contracts (November) (page 7)
- D. Warrants (October) (page 8)

4. Discussion: Other

This is an opportunity for audience members to address the Council on non-agendized items. Agendized items may be either addressed at this time or when the items come up for discussion.

The Council cannot discuss or take action on non-agendized items tonight, but items may be agendized at a later Council meeting for discussion and/or action. Public comments are limited to three minutes.

Information/Discussion Items:

5. Information: Ethics Training for the Board—Peter Sagebiel

Peter will check in with the Board on the assigned Ethics Training.

6. Information: Learning Center Updates—Dawn Anthney, Janice Eggers, Christine Sween

Dawn, Janice, and Christine will provide learning center updates.

7. Information: Local Control Accountability Plan (LCAP)—Peter Sagebiel

Peter will provide the Council with an LCAP update.

8. Information: Student Achievement—B.J. Hatcher

B.J. will provide the Council with an update on student achievement.

**9. Information: 2025/26 Budget and Cash Flow—Meshawn Simmons
(page 14)**

Meshawn will update the Council on the 2025/26 Budget items and Cash Flow.

Action Items:

10. Action: 25/26 Forest Charter School Salary Schedules—Peter Sagebiel and Meshawn Simmons

- Should the Council approve the revised 25/26 Forest Charter School salary schedules?

**11. Action: 403(b) Third Party Administrator Change—Meshawn Simmons
(page 24)**

- Should the Council approve the 403(b) Third-Party Administrator (TPA) change from Envoy Plan Services to SchoolsFirst Plan Administration (an affiliate of SchoolsFirst Federal Credit Union)?

12. Action: Forest Charter School Field Trip Policy--Meshawn Simmons

- Should the Council approve updates to the Forest Charter School Field Trip Policy?

13. Director's Update--Peter Sagebiel

- Political Update – Membership for ACSA and SSDA
- Special Education Percentages
- Other

14. Future Agenda Items

- i-Ready Trends and Comparisons (subgroups)
- Prop 28 (January)

15. Information: Reminder of Future Meetings

2025: 12/9**

2026: 1/13, 2/10, 3/10, 4/21, 5/12, 6/9*, 6/9****

***Special Meeting/Public Hearing **Budget Meeting**

16. Action: Adjourn

Forest Charter School

Monthly Charter Council Meeting Minutes – October 14, 2025

5:00 p.m. Regular Session
470 Searls Avenue, Sequoia
Nevada City, CA 95959

10725 Pioneer Trail # 201, Truckee, CA 96161
23221 Foresthill Road, Foresthill, CA 95631
11952 Masters Court, Auburn, CA 95603

Council Members:

Dan Thiem, Community Representative, and Chair
Amber Baker, Parent Representative
Makala Clinton, Parent Representative
Gabriella Stockdale, Parent Representative
Amea Medeiros, Parent Representative
Tita Fowler, Secretary

Minutes

Present: Peter Sagebiel, Meshawn Simmons, Dawn Anthney, Amber Baker, Makala Clinton, Janice Eggers, Tita Fowler, B.J. Hatcher, Jennifer Saxelby (Foresthill), David Stanger, Gabriella Stockdale, Christine Sween, Hannah Greenpine (Auburn), **Absent:** B.J. Hatcher, Amea Medeiros

1. **Call to Order: 5:01 pm**
2. **Roll Call:** Peter Sagebiel, Meshawn Simmons, Dawn Anthney, Amber Baker, Hannah Greenpine (Auburn), Makala Clinton, Janice Eggers, Tita Fowler, Jennifer Saxelby (Foresthill), David Stanger, Gabriella Stockdale, Christine Sween
3. **Information/Action: A, B, C, and D may be considered for Consent Agenda—Meshawn Simmons**

The October 14, 2025, Regular Meeting Charter Council Agenda, as well as the August 26 and September 16, 2025, Regular Meeting Minutes, Contracts, and Warrants, were presented for approval.

Amber Baker made a motion to approve the Consent Agenda. Gabriella Stockdale seconded—all ayes.

Ayes: Amber Baker, Makala Clinton, Gabriella Stockdale, Dan Thiem

Nays: None

4. **Discussion: Other**

None.

Information/Discussion Items:

5. Information: Ethics Training for the Board—Peter Sagebiel, Dan Thiem

Peter reminded the Board of the Ethics Training requirement that needs to be completed before the start of the new year (2026). The training has been assigned and will be resent to anyone who has not completed the training. Forest Charter has set a due date of 11/7/25.

6. Information: Learning Center Updates—Dawn Anthney (Nevada City), Janice Eggers (Truckee), Christine Sween (Auburn/Foresthill)

Dawn, Janice, and Christine provided learning center updates, which included exciting field trips and units the co-ops are studying and exploring. Dawn and Christine highlighted two IS students who are using Forest Charter's individualized learning model to launch and support extracurricular and academic activities that are exciting and motivating to the individual students' interests!

7. Information: Student Achievement—B.J. Hatcher

Peter reviewed i-Ready data with the Council.

8. Information: 2025/26 Budget and Cash Flow—Meshawn Simmons

Meshawn reviewed the 2025/26 budget, cash flow, and financial activity with the Council.

9. Information: Forest Charter School Salary Schedules—Peter Sagebiel and Meshawn Simmons

Peter and Meshawn discussed 2025/26 retroactive salary schedule adjustments and presented the fiscal impact. This will be brought to the Board for approval in November.

Action Items:

10. Action: Forest Charter School 24/25 Prop 28 Annual Report--Meshawn Simmons

The Forest Charter School 24/25 Prop 28 Annual Report was presented for approval.

Gabriella Stockdale made a motion to approve the 24/25 Prop 28 Annual Report. Makala Clinton seconded.

Ayes: Amber Baker, Makala Clinton, Gabriella Stockdale, Dan Thiem

Nays: None

11. Action: Walker CLAD Declaration of Need Approval--Meshawn Simmons

Meshawn presented Rebecca Walker's CLAD Declaration of Need for Board approval.

Amber Baker made a motion to approve Rebecca Walker's CLAD Declaration of Need. Gabriella Stockdale seconded.

Ayes: Amber Baker, Makala Clinton, Ameer Medeiros, Gabriella Stockdale

Nays: None

12. Action: Forest Charter School Field Trip Policy--Meshawn Simmons

Forest Charter School Field Trip Policy was not presented for approval. Will be brought for approval at a future meeting.

13. Director's Update--Peter Sagebiel

- Political Updates - SB414 vetoed by Newsom, SB707 passed, expanding and updating Open Meeting and Teleconferencing Requirements under the Brown Act
- Facility Issues - Working to resolve campus issues with water leaks and rodent issues
- Staff Meeting - featured staff development on trauma-informed education - steps and tools on how to work with students experiencing trauma.
- Other - Students of Concern meetings are having a positive impact on students experiencing struggles (academic, behavioral, and mental health)

14. Future Agenda Items

- i-Ready Trends and Comparisons (subgroups)
- Prop 28 (January)

15. Information: Reminder of Future Meetings

Dates for the 2025/26 Charter Council meetings were set as follows:

2025: 11/4, 12/9**

2026: 1/13, 2/10, 3/10, 4/21, 5/12, 6/9*, 6/9****

***Special Meeting**

****Budget Meeting**

16. Closed Session

The Council met in Closed Session in compliance with the Brown Act restrictions to discuss pending litigation. No action was taken.

17. Action: Adjourn at 5:46 pm

Respectfully submitted:

Tita Fowler, Secretary

Date

Charter Council Approved:

Dan Thiem, Chair

Date

Contracts to be approved: (November 2025)

Hourly:

Homan, Jen

\$560 (x2)

RTI Tutor

Checks Dated 10/01/2025 through 10/31/2025

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
26-473381	10/03/2025	AMAZON.COM AMAZON CAPITAL SERVICES INC	01-4300		11,959.96 ✓
26-473382	10/03/2025	B & C ACE HOME CENTER	01-4300		56.40
26-473383	10/03/2025	BALLET REJOICE SCHOOL FOR THE ARTS	01-5800		274.00
26-473384	10/03/2025	BRUCE MAIRS	01-5800		4,340.00
26-473385	10/03/2025	CALEB ENGEL	01-5800		235.00
26-473386	10/03/2025	CAMPE, LUCAS	01-5800		180.00
26-473387	10/03/2025	CENTER STAGE DANCE STUDIO	01-5800		177.00
26-473388	10/03/2025	COLLEEN MANUOLA	01-5800		1,400.00
26-473389	10/03/2025	EMILY PELLEGRINI	01-5800		200.00
26-473390	10/03/2025	EXTREME GYMNASTICS, INC	01-5800		416.25
26-473391	10/03/2025	GLADIZ DE LA TORRE DBA ESPANOL CON GLADIZ	01-5800		420.00
26-473392	10/03/2025	GRADUATIONSOURCE	01-4300		1,558.37
26-473393	10/03/2025	MINERS HARMONY MUSIC STORE	01-5800		80.00
26-473394	10/03/2025	NEVADA CITY BALLET ACADEMY	01-5800		1,035.00
26-473395	10/03/2025	NEVADA COUNTY CHARTER SERVICES AUTHORITY	01-4300	9,914.66	
			01-5100	172,668.08	182,582.74 ✓
26-473396	10/03/2025	NEVADA COUNTY SUPERINTENDENT	01-5806	3,600.00	
			01-9514	3,945.64	7,545.64 ✓
26-473397	10/03/2025	PENELOPE SULLIVAN	01-5800		180.00
26-473398	10/03/2025	SINGAPORE MATH INC	01-4300		858.83
26-473399	10/03/2025	T-MOBILE	01-5800		1,437.54
26-473400	10/03/2025	THE CLEANING SOLUTION	01-5800		2,930.00
26-473401	10/03/2025	US BANK CORPORATE PAYMENT SYS	01-4300	8,361.55	
			01-5210	75.00	
			01-5800	8,280.24	
			01-5920	23.40	
			Unpaid Tax	182.96-	16,557.23 ✓
26-473402	10/03/2025	VERIZON	01-5800		75.10
26-473403	10/03/2025	WHOLE MUSIC STUDIO, LLC	01-5800		200.00
26-473404	10/03/2025	WILD ACORNS LEARNING VILLAGE	01-5800		300.00
26-473751	10/10/2025	4 ELEMENTS EARTH EDUCATION INC	01-5800		1,880.00
26-473752	10/10/2025	ALL ABOUT LEARNING PRESS INC	01-4300		2,311.47
26-473753	10/10/2025	ALPINE LOCK AND KEY INC	01-5800		260.00
26-473754	10/10/2025	AMAZON.COM AMAZON CAPITAL SERVICES INC	01-4300	23,082.23	
			01-4400	5,367.36	
			01-4700	446.76	28,896.35 ✓
26-473755	10/10/2025	AUTISM OASIS	01-5800		399.00
26-473756	10/10/2025	B & C ACE HOME CENTER	01-4300		28.96
26-473757	10/10/2025	BEAM EASY LIVING CENTER	01-5800		192.00
26-473758	10/10/2025	BOB SWEAT M.ED MATH TUTORING	01-5800		400.00

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

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Checks Dated 10/01/2025 through 10/31/2025

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
26-473759	10/10/2025	BRAVE WRITER LLC	01-5800		99.75
26-473760	10/10/2025	BRIGHT THINKER INC.	01-4300	2,209.43	
			01-5800	905.00	3,114.43
26-473761	10/10/2025	CLEARFLY COMMUNICATIONS	01-5930		1,024.40
26-473762	10/10/2025	CLEVER MINDS	01-5800		820.00
26-473763	10/10/2025	DENISE GYNELL DOSHIER	01-5800		742.00
26-473764	10/10/2025	DENISON ALGEBRA	01-5800		535.00
26-473765	10/10/2025	EMILY PELLEGRINI	01-5800		990.00
26-473766	10/10/2025	EPS OPERATIONS LLC	01-4300		43.46
26-473767	10/10/2025	EZ WAY DRIVING SCHOOL	01-5800		200.00
26-473768	10/10/2025	FOREST CHARTER REVOLVING	01-4300		22.50
26-473769	10/10/2025	GOLD COUNTRY GYMNASTICS	01-5800		2,371.75
26-473770	10/10/2025	HAFDIS TRAUSTADOTTIR	01-5800		775.00
26-473771	10/10/2025	HEATHER GROVE	01-5800		740.00
26-473772	10/10/2025	INSTITUTE FOR EXCELLENCE/IN WR ITING	01-4300		149.18
26-473773	10/10/2025	KATHRYN NUNN	01-5800		2,330.00
26-473774	10/10/2025	LEARNING WITHOUT TEARS	01-4300		140.42
26-473775	10/10/2025	MATH U SEE INC	01-4300		562.35
26-473776	10/10/2025	MINERS HARMONY MUSIC STORE	01-5800		50.00
26-473777	10/10/2025	NEVADA CITY BALLET ACADEMY	01-5800		270.00
26-473778	10/10/2025	NICOLE THE MATH LADY	01-5800		138.00
26-473779	10/10/2025	ORIGO EDUCATION INC	01-5800		300.00
26-473780	10/10/2025	PAMELOT A SCHOOL OF DANCE	01-5800		394.00
26-473781	10/10/2025	PHILLIPS SCHOOL OF KUNG FU SAN SOO	01-5800		566.00
26-473782	10/10/2025	PIONEER COMMERCE CENTER	01-5800		783.43
26-473783	10/10/2025	R&B COMMUNICATIONS	01-5800		395.00
26-473784	10/10/2025	RAINBOW RESOURCE CENTER	01-4300		278.61
26-473785	10/10/2025	RICHARD T KIRKPATRICK	01-5800		280.00
26-473786	10/10/2025	ROSE-MAY MICKELSON	01-5800		660.00
26-473787	10/10/2025	SEBASTIAN	01-5930	119.33	
			01-5940	61.72	181.05
26-473788	10/10/2025	SHERRY TORGERSO	01-5800		1,350.00
26-473789	10/10/2025	SIERRA NEVADA BOULDERING GYM	01-5800		424.00
26-473790	10/10/2025	SINGAPORE MATH INC	01-4300		672.25
26-473791	10/10/2025	SOUTH YUBA CLUB INC.	01-5800		320.00
26-473792	10/10/2025	SPD MARKET- NEVADA CITY	01-4300		385.51
26-473793	10/10/2025	SUZIE GEMIGNANI	01-5800		270.00
26-473794	10/10/2025	TAHOE TOTAL HOME CARE DBA ALPE NGLOW	01-5800		2,640.00
26-473795	10/10/2025	TARALEIGH DUFFY	01-5800		600.00
26-473796	10/10/2025	TEACHERS CURRICULUM INSTITUTE	01-4300	211.22	
			01-5800	545.00	756.22
26-473797	10/10/2025	TEACHING TEXTBOOKS INC	01-5800		78.84
26-473798	10/10/2025	THE CURIOSITY COLLECTIVE	01-5800		250.00

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Checks Dated 10/01/2025 through 10/31/2025

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
26-473799	10/10/2025	TRUCKEE DONNER PUBLIC UTILITY REMITTANCE CENTER	01-5520	586.90	
			01-5540	222.61	809.51
26-474188	10/17/2025	ALL ABOUT LEARNING PRESS INC	01-4300		186.10
26-474189	10/17/2025	ART OF PROBLEM SOLVING	01-5800		40.00
26-474190	10/17/2025	AT&T	01-5930		31.41
26-474191	10/17/2025	AUBURN GYMNASTICS CENTER	01-5800		132.00
26-474192	10/17/2025	BRIGHT THINKER INC.	01-5800		900.00
26-474193	10/17/2025	BYU CONTINUING EDUCATION	01-5800		674.10
26-474194	10/17/2025	CALIFORNIA DEPT OF TAX AND FEE ADMINISTRATION	01-9508		159.12
26-474195	10/17/2025	CATHLEEN WHITING	01-5800		1,635.00
26-474196	10/17/2025	CLEVER MINDS	01-5800		350.00
26-474197	10/17/2025	GPE	01-5400		5,357.00
26-474198	10/17/2025	JANET WARNECKE	01-5800		900.00
26-474199	10/17/2025	JUANITA MCCREERY	01-5800		180.00
26-474200	10/17/2025	KAREN JANSON DBA DANCE NATURAL CREATIVE COMPLEX	01-5800		300.00
26-474201	10/17/2025	MINERS HARMONY MUSIC STORE	01-5800		160.00
26-474202	10/17/2025	PACIFIC GAS & ELECTRIC COMPANY	01-5510	56.88	
			01-5520	2,689.62	2,746.50
26-474203	10/17/2025	PERFORMANCE SYSTMS INTGTN LLC	01-5800		105.00
26-474204	10/17/2025	SAVINA HAVENS	01-5800		40.00
26-474205	10/17/2025	SEAN BIANCO	01-5800		450.00
26-474206	10/17/2025	SPD MARKET- NEVADA CITY	01-4300	124.87	
			01-4700	23.95	
			01-5920	234.00	382.82
26-474207	10/17/2025	STACEY ANDERSON	01-5800		450.00
26-474208	10/17/2025	STATE OF CA DOJ DEPT OF JUSTICE/ CASHIER UNIT	01-5840		49.00
26-474209	10/17/2025	T-MOBILE	01-5800	4.55	
			01-5930	271.24	275.79
26-474210	10/17/2025	TARALEIGH DUFFY	01-5800		1,340.00
26-474211	10/17/2025	TEACHING TEXTBOOKS INC	01-5800		291.80
26-474212	10/17/2025	TIFFANY MADDEN	01-5800		4,748.75
26-474213	10/17/2025	Time4Learning	01-5800		524.25
26-474214	10/17/2025	WASTE MANAGEMENT	01-5570		461.54
26-474215	10/17/2025	WAVE	01-5930	8.45	
			01-5940	104.34	112.79
26-474216	10/17/2025	WILLIAMS STATIONERY	01-4300		766.75
26-474583	10/24/2025	ALL ABOUT LEARNING PRESS INC	01-4300		955.62
26-474584	10/24/2025	AMAZON.COM AMAZON CAPITAL SERVICES INC	01-4300	6,153.11	
			01-4400	4,472.37	
			01-4700	440.30	11,065.78

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Checks Dated 10/01/2025 through 10/31/2025

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
26-474585	10/24/2025	AOPS INCORPORATED/ART OF PROBL EM SOLVING	01-4300		21.76
26-474586	10/24/2025	BRANDILYN DAVIDSON	01-5800		230.00
26-474587	10/24/2025	BRAVE WRITER LLC	01-5800		457.85
26-474588	10/24/2025	BRIGHT THINKER INC.	01-5800		2,100.00
26-474589	10/24/2025	CATHLEEN WHITING	01-5800		1,635.00
26-474590	10/24/2025	COMCAST	01-5930	320.36	
			01-5940	26.57	346.93
26-474591	10/24/2025	ELEMENTAL LEARNING, INC.	01-5800		5,314.16 ✓
26-474592	10/24/2025	EZ WAY DRIVING SCHOOL	01-5800		700.00
26-474593	10/24/2025	GOLD MINER PEST CONTROL INC.	01-5800		850.00
26-474594	10/24/2025	HOLT BALLET CONSERVATORY	01-5800		229.50
26-474595	10/24/2025	LEARNING WITHOUT TEARS	01-4300		162.08
26-474596	10/24/2025	LOGIC OF ENGLISH INC	01-4300		251.24
26-474597	10/24/2025	MATH U SEE INC	01-4300		164.72
26-474598	10/24/2025	MIAPLAZA, INC.	01-5800		540.00
26-474599	10/24/2025	MINERS HARMONY MUSIC STORE	01-5800		35.00
26-474600	10/24/2025	NEVADA CITY SCHOOL DISTRICT	01-5800		352.32
26-474601	10/24/2025	NEVADA CITY SELF STORAGE	01-5600		930.00
26-474602	10/24/2025	PENELOPE SULLIVAN	01-5800		90.00
26-474603	10/24/2025	RAINBOW RESOURCE CENTER	01-4300		149.78
26-474604	10/24/2025	RIVERS LAW INC., APC	01-5802		8,000.00 ✓
26-474605	10/24/2025	SOUTHWEST GAS CORPORATION	01-5510		54.26
26-474606	10/24/2025	TEACHING TEXTBOOKS INC	01-5800		118.90
26-474607	10/24/2025	UC SCOUT	01-5800		1,596.00
26-474608	10/24/2025	YESHIVA DERECH HATORAH	01-4300	217.97	
			Unpaid Tax	17.77-	200.20
26-474904	10/31/2025	ABSOLUTE COMM SOLUTIONS	01-5800		700.21
26-474905	10/31/2025	ANTHEM BLUE CROSS	01-9514		44,910.53 ✓
26-474906	10/31/2025	CANYON VIEW ASSEMBLY	01-5600		2,200.00
26-474907	10/31/2025	CLINTON WEAKLEY DBA COPPERWOOD CONSTRUCTION	01-4300	580.80	
			01-5800	1,169.75	1,750.55
26-474908	10/31/2025	DE LAGE LANDEN FINCL SRV INC	01-5600		3,967.22
26-474909	10/31/2025	IMAGINE LEARNING LLC	01-5800		20,150.00 ✓
26-474910	10/31/2025	K&T MANAGEMENT	01-5600		2,200.00
26-474911	10/31/2025	NEVADA CITY SCHOOL DISTRICT	01-5600		15,000.00 ✓
26-474912	10/31/2025	NEVADA COUNTY CHARTER SERVICES AUTHORITY	01-4300	9,914.66	
			01-5100	172,668.08	182,582.74 ✓
26-474913	10/31/2025	NEVADA COUNTY SUPERINTENDENT	01-9514		3,555.53
26-474914	10/31/2025	PIONEER COMMERCE CENTER	01-5600		17,841.74 ✓
26-474915	10/31/2025	ROBERT HEISER	01-5800		1,050.00
26-474916	10/31/2025	T-MOBILE	01-5800	24.29	
			01-5930	1,446.89	1,471.18
26-474917	10/31/2025	THE CLEANING SOLUTION	01-5800		2,930.00

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ERP for California

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Checks Dated 10/01/2025 through 10/31/2025

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
26-474918	10/31/2025	TYE W TREVETHICK DBA A1 CARPET MASTERS	01-5800		511.20
26-474919	10/31/2025	VERIZON	01-5800		38.01
Total Number of Checks			144		<u>658,039.23</u>

Fund Recap

Fund	Description	Check Count	Expensed Amount
01	FOREST CHARTER	144	658,239.96
	Total Number of Checks	144	658,239.96
	Less Unpaid Tax Liability		200.73-
	Net (Check Amount)		<u>658,039.23</u>

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

33%

FOREST CHARTER SCHOOL FY 25-26

Fiscal Year 2025/26 Through 10/29/25

Object	Description	Revised Budget	Revenue	% Rcvd
Total Year To Date Revenues		12,741,735.00	1,991,349.81	16%

Object	Description	Revised Budget	Actual	% Used
Total Certificated Salaries		4,283,107.00	1,080,948.68	25%
Total Classified Salaries		1,111,849.00	311,550.39	28%
Total Employee Benefits		1,876,515.00	434,382.69	23%

Books and Supplies

4300	MATERIALS AND SUPPLIES	377,194.00	176,611.67	47%
4400	NON CAPITALIZED EQUIPMENT	3,000.00	9,839.73	328%
4700	FOOD	10,000.00	1,261.31	13%
Total Books and Supplies		390,194.00	187,712.71	48%

Services and Other Operating Expenditures

5100	SUBAGREEMENTS FOR SERVICES	2,268,263.00	690,672.32	30%
5210	CONFERENCE	11,000.00	4,180.00	38%
5220	MILEAGE REIMBURSEMENT	4,500.00	238.70	5%
5300	DUES AND MEMBERSHIPS	20,000.00	0.00	0%
5400	INSURANCE	75,000.00	48,449.17	65%
5510	GAS HEATING/FUEL	15,000.00	282.87	2%
5520	ELECTRICITY	30,000.00	9,171.54	31%
5540	WATER	6,500.00	1,280.65	20%
5550	SEWER	1,000.00	272.72	27%
5570	GARBAGE	4,500.00	1,354.02	30%
5600	RENT,LEASES,REPAIRS/NON CAP	445,000.00	154,248.47	35%
5800	PROF/CONSUL/SVCS/OP EXPENSE	1,357,785.00	207,434.10	15%
5801	ADVERTISING	5,000.00	72.00	1%
5802	LEGAL FEES	35,000.00	9,558.50	27%
5806	DATA PROCESSING SERVICES	50,000.00	31,221.11	62%
5840	FINGERPRINTING	1,000.00	245.00	25%
5850	OVERSIGHT	106,251.00	0.00	0%
5852	BUSINESS SERVICES	106,251.00	0.00	0%
5920	POSTAGE/SHIPPING (OUT)	3,500.00	921.98	26%
5930	TELEPHONE	15,000.00	4,098.32	27%
5940	INTERNET	25,000.00	770.24	3%
Total Services and Other Operating Expenditures		4,585,550.00	1,164,471.71	25%

Total Year To Date Expenditures		12,247,215.00	3,179,066.18	26%
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FOREST CHARTER SCHOOL
Annual Administrative Salary Schedule
2025-2026

Range		
Step	A	B
1	\$ 128,718.26	\$ 104,648.48
2	\$ 133,386.88	\$ 107,884.56
3	\$ 138,223.69	\$ 111,223.34
4	\$ 143,237.64	\$ 114,663.53
5	\$ 148,432.57	\$ 118,208.99
6	\$ 153,816.21	\$ 121,757.00
7	\$ 159,394.97	\$ 125,303.72
8	\$ 165,176.54	\$ 128,850.46
9	\$ 171,167.35	\$ 132,397.19
10	\$ 177,373.80	\$ 135,943.93

Job Classification	
Credentialed	
A	Executive Director (204 Days)
B	Assistant Director/Academic Dean (199 Days)

Recommend salary schedule be reviewed every 2 -3 years for market comparison and budget sustainability

Last reviewed March, 2024

Health Benefit eligible at .75 FTE with the following Annual Caps:

Employee	\$9,000
Employee + Child	\$10,000
Employee + Spouse	\$10,000
Employee + Family	\$14,500

Anything above the Cap is an employee out-of-pocket expense

Dental & Vision are voluntary and are not covered under the Cap

Board Approvals/Revisions

2006/2007 - Board Approved 5/16/06

2007/08 - Board revised: 3% COLA

2008/09 - Board revised: Benefit cap increase to \$6500

2009/10 - No COLA or Step increase

2010/11 - No COLA or Step increase

2011/12 - No COLA or Step increase

2012/13 - Board revised: 3% increase

2013/14 - Board revised: two step increase/ Benefit cap increase to \$7000/Dental & Vision under cap/life ins. Avail to all emp

2014/15 - Board approved moving Business Director to Adm Salary Schedule, classification "B"; Revised Adm salary schedule to reflect 15 steps. Steps 11 - 15 = 3% of Step 10; Revised adm salary schedule to reflect 10 steps total, removing steps 1-5. 3/18/14

2014/15 - Board approved two step increase/Benefit Cap increase to \$7500. 3/18/14

2015/16 - Board approved COLA increase of 1.02% May 26, 2015

2015/16 - Board approved 16/17 salary schedule. No COLA or Health Cap increase; March 15, 2016

2016/17 - Board approved 5% annual increase effective 7/1/16;

2016/17 - Board approved increase/restructure in Range A effective 7/1/17

2017/18 - Board approved corrections to Health Benefit cap. 1/16/18

2017/18 - Board approved 2.5% annual increase. 4/17/18

2019/20 - Board approved 3% annual increase. 10/15/19. Effective 7/1/19

2021/22 - Board approved 3% increase to be effective 7/1/2021

2022/23 - Board approved 6% annual increase and benefit cap increase

2023/24 - Board approved 6% annual increase

2024/25 - Board approved 2% annual increase

2025/26 - Board approved benefits cap increase

2025-26 - Board approved 3% retro COLA

Charter Council Approved: 11/4/2025

Effective: 7/1/2025

Forest Charter School

Classified Aide Salary Schedule - Hourly

2025-2026

Classified Support Staff

Range/Step	1	2	3	4	5	6	7	8	9	10
A	19.25	20.21	21.22	22.27	23.39	24.57	25.80	27.10	28.44	29.87

Job Classifications

A Health and Safety Aide

Additional \$1 per hour for toileting duty (as assigned)

Board Approvals/Revisions

Approved: 8/28/14
 Approved: 5/26/15
 Approved: 4/19/16
 Approved: 8/23/16
 Approved: 9/20/16
 Approved: 8/22/17
 Approved: 4/17/18 2.5% annual increase
 Approved: 10/15/19 3% annual increase
 Approved: 3% increase
 Approved 6% increase
 Approved 6% increase
 Approved: \$1/hour addition to approved toileting duty
 Approved: 2% annual increase

2025-26 - Board approved 3% retro COLA

Charter Council Approved: 11/4/2025

Effective: 7/1/2025

FOREST CHARTER SCHOOL
CLASSIFIED ENRICHMENT BLOCK CLASS SALARY SCHEDULE
2025-2026

Hours per week include class prep-time and meetings

Range						Step 1	Step 2	Step 3	Step 4	Step 5
A	Specialist Instructor		Ret-Base AT 1.0 FTE			\$41,442.12	\$44,033.38	\$46,624.64	\$49,251.89	\$51,825.15
	Pathways: Elective 7-12 class 3.5HRS/WK		Hourly Rate			\$ 28.00	\$ 29.75	\$ 31.50	\$ 33.28	\$ 35.02
			33 weeks	Annual		\$ 3,234.17	\$ 3,436.39	\$ 3,638.61	\$ 3,843.64	\$ 4,044.46
Actual FTE of Employee is 0.07804										

B	Specialist Instructor		Ret-Base AT 1.0 FTE			\$35,377.86	\$37,807.17	\$40,218.47	\$42,629.78	\$45,041.09
	Pathways: Enrichment K-8 class 2.0HRS/WK		Hourly Rate			\$ 23.90	\$ 25.55	\$ 27.17	\$ 28.80	\$ 30.43
			31 weeks	Annual		\$ 1,482.05	\$ 1,583.81	\$ 1,684.83	\$ 1,785.84	\$ 1,886.86
Actual FTE of Employee is 0.04189										

1FTE = 185 Workdays at 8 hours per day

Benefits

1. Sick Leave = 40 hours for part-time employees (does not roll over year to year)
2. No Holiday pay
3. Instructor to be paid twice per month with equal pay over 10 months
4. Auto deposit available

Schoolwide Benefit Eligibility

.75 FTE or greater are eligible for health benefits pro-rated based on date of hire or eligibility

Initial placement on salary schedule is at the discretion of the School Director.

Steps do not reflect number of years at FCS.

2017-18 Board approved 2.5% annual increase. 4/17/18

2019-20 Board approved 3% annual increase 10/15/19

21/22 Board approved 3% increase

22/23 Board approved 6% annual increase

23/24 Board approved 6% annual increase

24/25 Board approved 2% annual increase

2025-26 - Board approved 3% retro COLA

Charter Council Approved: 11/4/2025

Effective: 7/1/2025

Classified Exempt Salary Schedule

2025-2026

	<u>Classified Exempt Staff</u>									
Range/Step	1	2	3	4	5	6	7	8	9	10
A	60.09	61.95	63.88	65.85	67.89	69.92	71.95	73.98	76.03	78.06
B	38.95	40.54	42.54	44.69	49.28	51.73	54.32	57.04	59.89	62.88
C	34.13	35.84	37.64	39.52	41.50	43.56	45.75	48.05	50.44	52.97

Last reviewed March, 2025

<u>Job Classifications</u>	205 Workdays + 11 Holidays + 10 Vacation Days
A	Business Director
B	Fiscal Manager
C	Technology Director

Comments

- 1 1 FTE is defined as 226 paid days @ 8 hours per day
- 2 Employees are benefit eligible at .75 FTE
- 3 Full time employees earn 12 sick days per year
- 4 Full time employees receive 11 paid holidays per year
- 5 Initial placement is at the Executive Director's discretion
- 6 Salary steps reflect one full year of employment at FCS.

Health Benefit Cap	
Employee	\$9,000
Employee + Child	\$10,000
Employee + Spouse	\$10,000
Employee + Family	\$14,500

Board Approvals/Revisions

2024-25 - Board approved 2% annual increase

2025-26 - Board approved benefit cap increase, and changes in sick and vacation, and Range C, Step 10 increase

2025-26 - Board approved 3% retro COLA

Charter Council Approved: 11/4/2025

Effective: 7/1/2025

Classified Hourly Salary Schedule

2025-2026

Classified Support Staff

Range/Step	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
B	27.19	28.62	30.12	31.73	33.39	35.16	36.89	38.75	40.70	42.73	44.86	47.11	49.47	51.94	54.53
C	26.26	27.66	29.02	30.49	32.01	33.61	35.30	37.05	38.91	40.86	42.90	45.04	47.31	49.67	52.15
D	24.25	25.52	26.88	27.24	29.78	31.35	33.00	34.65	36.37	38.20	40.11	42.11	44.22	46.43	48.74
E	22.26	23.42	24.68	25.89	27.19	28.55	29.97	31.48	33.05	34.71	36.45	38.28	40.18	42.20	44.30
F	22.01	23.17	24.32	25.52	26.83	28.16	29.57	31.04	32.58	34.24	35.96	37.75	39.63	41.63	43.71
G	19.21	20.22	21.28	22.40	23.56	24.82	26.05	27.35	28.74	30.69	32.24	33.84	35.54	37.32	39.18

Recommend salary schedule be reviewed every 2 -3 years for market comparison and budget sustainability

Last reviewed March, 2024

Job Classifications

	207 Workdays + 11 Holidays + 12 Vacation = 230 paid days
B	Attendance/Payroll Specialist; Attendance/Payroll Assistant; Administrative Business Assistant
C	Maintenance
D	Resource Facilitator
E	Administrative Assistant; Enrollment Coordinator
F	Front Desk
G	IT Help Desk Assistant/Office Support

Comments

- 1 FTE is defined as 230 paid days @ 7.5 hours per day
- Employees are benefit eligible at .75 FTE
- Full time employees earn 14 sick days per year
- Full time employees receive 11 paid holidays per year
- Full time employees receive 12 paid vacation days per year to be paid in July
See Employee Handbook for more detail.
- Initial placement is at the Executive Director's discretion
- Salary steps reflect one full year of employment at FCS.

Health Benefit Cap	
Employee	\$9,000
Employee + Child	\$10,000
Employee + Spouse	\$10,000
Employee + Family	\$14,500

Board Approvals/Revisions

2006/2007 - Board Approved 5/16/06
2007/08 - Board revised: 5% COLA
2008/09 - Board revised: Benefit cap increase to \$6500
2009/10 - No COLA or Step increase
2010/11 - No COLA or Step increase
2011/12 - No COLA or Step increase
2012/13 - Board revised: 3% increase
2013/14 - Board revised: two step increase/ Benefit cap increase to \$7000/Life Ins. Available to all emp/Vision & Dental included under cap/7.5 hour workday/Board approved COLA increase of 1.56%
2014/15 - Board approved the addition of 5 steps totaling 15 steps/COLA increase of .85%; Benefit cap increase to \$7500; 3/18/14.
2014/15 - Board approved 10 vacation days to be paid in July only; 5/27/14
2015/16 - Board approved COLA increase of 1.02%; May 26, 2015
2015/16 - Board approved COLA increase of 1.02%; May 26, 2015
2015/16 - Board approved 16/17 salary schedule. No COLA or Health Cap increase; March 15, 2016
2016/2017 - Board approved 5% raise effective July 1, 2016
2017/18 - Board approved corrections to Health Benefit cap. 1/16/18
2017/2018 - Board approved 2.5% COLA increase; Revised Job Classifications. 4/17/18
2018/2019 - Removed job classification 'H'; added "A1" as exempt position
2019-20 - Board approved 3% annual increase. 10-15-19
2020-2021 - Board approved 2% annual increast 4/21/2020
2021-2022 Board approved 3% increase and benefit cap increase
2022-2023 - Board approved 6% annual increase and benefit cap increase
2023-24 - Board approved a new schedule line (A), assigned schedule F, and add one additional vacation day to be taken in July (beginning 24/25)
2024-25 - Board approved 2% annual increase
2025-26 - Board approved benefits cap increase, changes in sick and vacation
2025-26 - Board approved 3% retro COLA

Charter Council Approved: 11/4/2025

Effective: 7/1/2025

FOREST CHARTER SCHOOL
CREDENTIALLED BLOCK CLASS INSTRUCTOR SALARY SCHEDULE
2025-2026

Hours per week include class prep-time and meetings

Range			Step 1	Step 2	Step 3	Step 4	Step 5
A	Specialist Instructor	Ret-Base AT 1.0 FTE	\$ 45,347.00	\$ 49,125.92	\$ 52,904.84	\$ 56,665.76	\$ 60,438.81
	Pathways: Core 7-12 class 4.0HRS/WK						
	Actual FTE of Employee is 0.08919	Annual/33wks	\$4,044.46	\$4,381.50	\$4,718.54	\$5,053.97	\$5,390.49
	Actual FTE of Employee is 0.08919	Hourly Rate	\$30.64	\$33.19	\$35.75	\$38.29	\$40.84

B	Specialist Instructor	Ret-Base AT 1.0 FTE	\$ 41,442.12	\$ 44,033.38	\$ 46,624.64	\$ 49,251.89	\$ 51,825.15
	Pathways: Elective 7-12 class 3.5HRS/WK						
	Actual FTE of Employee is 0.07804	Annual/33wks	\$3,234.17	\$3,436.39	\$3,638.61	\$3,843.64	\$4,044.46
	Actual FTE of Employee is 0.07804	Hourly Rate	\$28.00	\$29.75	\$31.50	\$33.28	\$35.02

C	Specialist Instructor	Ret-Base AT 1.0 FTE	\$ 35,377.86	\$ 37,807.17	\$ 40,218.47	\$ 42,629.78	\$ 45,041.09
	Pathways: Enrichment K-8 class 2.0HRS/WK						
	Actual FTE of Employee is 0.04459	Annual/31wks	\$1,482.05	\$1,583.81	\$1,684.83	\$1,785.84	\$1,886.86
	Actual FTE of Employee is 0.04459	Hourly Rate	\$23.90	\$25.55	\$27.17	\$28.80	\$30.43

1FTE = 185 Workdays at 8 hours per day

Benefits

1. Sick Leave = 40 hours (does not roll over year to year) for part-time employees
 2. No Holiday pay
- .75 FTE or greater are eligible for health benefits pro-rated based on date of hire or eligibility
Initial placement on salary schedule is at the discretion of the School Director.
Steps do not reflect number of years at FCS.

Board approvals

2017-18 Board approved 2.5% annual increase 4-17-18
2019-20 Board approved 3% annual increase 10-15-19
2020-21 Board approved 3% annual increase
2022-23 Board approved 6% annual increase
2023-24 Board approved 6% annual increase
2024-25 Board approved 2% annual increase
2025-26 Board approved 3% retro annual increase
Charter Council Approved: 11/4/2025
Effective: 7/1/2025

Forest Charter School Certificated Salary Schedule - Annual 2025-2026

Supervising Teacher (ST)	
Step A	\$ 53,909.17
Step 1	\$ 61,861.80
Step 2	\$ 63,099.04
Step 3	\$ 64,361.01
Step 4	\$ 65,648.23
Step 5	\$ 68,750.37
Step 6	\$ 71,500.21
Step 7	\$ 74,002.72
Step 8	\$ 76,596.12
Step 9	\$ 79,273.55
Step 10	\$ 82,048.13
Step 11	\$ 85,206.82
Step 12	\$ 88,373.73
Step 13	\$ 91,581.51
Step 14	\$ 94,789.30
Step 15	\$ 97,997.06
Step 16	\$ 97,997.06
Step 17	\$ 97,997.06
Step 18	\$ 99,280.71
Step 19	\$ 99,280.71
Step 20	\$ 100,564.36
**23-25 Students = 1.0 FTE	
18 Students = Benefits	

Supervising Teacher/K-8 Co-op	
Step A	\$ 53,909.17
Step 1	\$ 61,861.80
Step 2	\$ 63,099.04
Step 3	\$ 64,361.01
Step 4	\$ 65,648.23
Step 5	\$ 68,750.37
Step 6	\$ 71,500.21
Step 7	\$ 74,002.72
Step 8	\$ 76,596.12
Step 9	\$ 79,273.55
Step 10	\$ 82,048.13
Step 11	\$ 85,206.82
Step 12	\$ 88,373.73
Step 13	\$ 91,581.51
Step 14	\$ 94,789.30
Step 15	\$ 97,997.06
Step 16	\$ 97,997.06
Step 17	\$ 97,997.06
Step 18	\$ 99,280.71
Step 19	\$ 99,280.71
Step 20	\$ 100,564.36
**18-22 Students = 1.0 FTE	
14 Students = Benefits	

Additions To Salary Steps

Master's Stipend \$1,000

College and Career Data Specialist Hourly Rate is based on Credentialed Salary Schedule

Recommend salary schedule be reviewed every 2 -3 years for market comparison and budget sustainability

Last reviewed March, 2024

Comments

1. Full-time ST's are contracted for 185 days (175 students days + 10 Contract Days)
2. ST's are paid on a "per student" or "annual" employment agreement. See Employee Handbook for more details.
3. Full-time annual salary is identified above. FCS does not guarantee an ST will reach, or remain at, full time status if placed on a "per student" employment agreement. Fewer than a 1.0 FTE will impact STRS credit and salary.
4. Full-time ST's earn 10 sick leave days per school year; this is pro-rated for part-time
5. Part-time salaries shall be pro-rated based on FTE
6. ST's do not receive vacation or holiday pay
7. Salary steps reflect one full school year with FCS
8. Initial salary placement is at Executive Director's discretion
9. ST's are Health Benefit eligible at .75 FTE with the following Annual Caps:

Employee	\$9,000
Employee + Child	\$10,000
Employee + Spouse	\$10,000
Employee + Family	\$14,500

7. Anything above the Cap is an employee out-of-pocket expense
8. Dental & Vision are voluntary and are not covered under the Cap

Board Approvals/Revisions

2006/07 - Board Approved 5/16/06

2007/08 - Board revised: 5% COLA

2008/09 - Board revised: Benefit cap increase to \$6500; ES Salary Schedule 08/09 - Provide "range" compensation rather than "per student" compensation; 4/22/08

2008/09 - ES Salary Schedule 08/09 revised to return to "per student" compensation; 12/9/09

2009/10 - No COLA or Step increase

2010/11 - No COLA or Step increase

2011/12 - No COLA or Step increase

2012/13 - Board revised: 3% increase

2013/14 - Board revised: two step increase/ Benefit cap increase to \$7000/Life Ins. Available to all emp/Vision & Dental included under cap; Board approved COLA increase of 1.56%

2014/15 - Board approved COLA increase of .85%; Benefit cap increase to \$7500; 3/18/14.

2015/16 - Board approved COLA increase of 1.02%; 5/26/15

2015/16 - Board approved 16/17 salary schedule. No COLA or Health Cap increase; 3/15/16

2016/17 - /Board approved 5% annual increase effective July 1, 2016

2016/17 - Board approved additional 5 steps. Increase Masters stipend to \$1000 annual. 4/18/17

2017/18 - Board approved corrections to Health Benefit cap. 1/16/18

2017/18 - Board approved 2.5% annual increase. 4/17/18

2019-20 - Board approved 3% annual increase 10-15-19

2021-2022 Board approved 3% annual increase and increase to benefit cap

2022-2023 - Board approved 6% annual increase and increase to benefit cap 4/19/22

2023-2024 - Board approved 6% annual increase

2024-2025 - Board approved changes to step 1 and 2 4/16/24

2025-2026 - Board approved benefit cap increase, addition of Step A, and minimum wage adjustment.

2025-26 - Board approved 3% retro COLA

Charter Council Approved: 11/4/2025

Effective: July 1, 2025

Forest Charter School
SPED Support Teacher
2025-2026

<u>Classified</u>										
Range/Step	1									
A	\$ 58,508.00									
	48.89	51.34	53.90	56.60	59.43	62.39	65.52	68.79	72.23	75.84

Job Classifications

A	SPED Support Teacher
	1.0 FTE = 182 days

2025-26 - Board approved 3% retro COLA
Charter Council Approved: 11/4/2025
Effective: July 1, 2025

**SchoolsFirst Plan Administration
And
Forest Charter School**

**SERVICE AGREEMENT
403(b) PLAN**

This Agreement is hereby entered into by and between SchoolsFirst Plan Administration, herein after referred to as "SchoolsFirst" and Forest Charter School "Employer" and collectively referred to as the Parties for the purpose of this Agreement.

The parties hereby agree as follows:

1.0 ADMINISTRATIVE DUTIES

SchoolsFirst will perform services as Third Party Administrator as required for the proper administration of Employer's retirement plans that qualify under IRC Sections 403(b) ("the Plan"). SchoolsFirst shall be charged with the duties of the general administration of the Plan, including, but not limited to, the following:

- (a) SchoolsFirst will assist Employer in maintaining its provider retirement plan meeting operational, compliance, and administrative guidelines under Section 403(b) of the Internal Revenue Code of 1986 ("the Code"). All rights, privileges, and responsibilities for establishing the terms and conditions of the Plan, implementation of the Plan, and managing the Plan in all respects other than with respect to those services to be performed by SchoolsFirst as described in this Agreement and/or in the Plan, will be at the sole discretion and direction of the Employer as Plan Sponsor. SchoolsFirst will review and make recommendations to the Employer or such other person designated by the Employer with regard to any plan changes that may be required to assist the Employer with continuing compliance.
- (b) SchoolsFirst will determine the eligibility of participants to receive benefits and make contributions to the Plans.
- (c) SchoolsFirst will maintain all necessary records for the administration of the Plans and file any necessary returns relating to the Plans.
- (d) SchoolsFirst will create and maintain a database of information provided by Employer or its designee and Employer's employees to monitor applicable contribution limits under IRC Sections 403(b), 402(g), and 415(c). The database will establish and monitor the maximum allowable contribution ("MAC") limit for each participant in the Plans. SchoolsFirst shall make all reasonable efforts to prevent excess deferrals during the tax year.
- (e) SchoolsFirst will rely exclusively on information provided by the Employer and employee in establishing allowable limits and performing any required calculations.

- (f) SchoolsFirst will coordinate procedures to properly correct contributions made in excess of maximum allowable contribution limits, if any, with the participant and investment option provider.
- (g) SchoolsFirst agrees to assist Employer or its designee to share encrypted employee data and to receive retirement plan contributions for the Plans via electronic payroll deductions. Each pay period, Employer or their designee will remit retirement plan contributions for its employees to SchoolsFirst via ACH/EFT or Fed Wire; and Employer or its designee will provide an ASCII text file or other electronic file of employee data from Employer's payroll system via encrypted Internet transmission.
- (h) During the term and renewal terms(s) of this agreement, SchoolsFirst will remain a technical resource for Employer and Employer's employees, and will provide ongoing services to resolve operational, administrative, and compliance issues.
- (i) SchoolsFirst agrees to make copies of all plan records in its possession or control available for Employer review upon receipt of written request from Employer.
- (j) SchoolsFirst will also assist Employer in preparing and establishing a written loan policy as well as reviewing distributions, exchange/transfers, and loan requests for authorization.
- (k) SchoolsFirst will facilitate services to participants regarding the rights, benefits, or elections available under the provider plans and in assisting employees in completing any forms necessary for participation.
- (l) SchoolsFirst will facilitate the collection of Provider Agreements and act as Employer's liaison to answer questions and inquiries from providers. SchoolsFirst will notify Employer and make recommendations regarding any provider or potential provider who does not agree to cooperate with all administrative and compliance procedures as established by the SchoolsFirst, and/or with the terms of the Provider Agreement.
- (m) SchoolsFirst will receive and process all Salary Reduction Agreements for all participants of the plans.
- (n) SchoolsFirst will provide the Employer with timely information of any additions or changes that may be required for payroll processing as a result of an addition, change or termination of a Salary Reduction Agreement.
- (o) SchoolsFirst agrees to assist Employer to establish an employee education program that satisfies federal and state regulation requirements. The education program will be designed to meet the specific needs of the Employer and Employer's employees, including online website education resources, written material, and voluntary workshops.

2.0 EMPLOYER RESPONSIBILITIES

The Employer will provide information for each employee participating in the Plans necessary for SchoolsFirst to establish an information database, and to establish the Maximum Allowable Contribution limits and monitoring as set forth in Article 1.0. If necessary, information not available to Employer may be provided by Employer's employees. Employer acknowledges the importance of obtaining accurate data from the Employer's employees and agrees to facilitate the gathering of information from employees in any manner that is reasonable and permitted within IRS and State procedure, and that allows SchoolsFirst to perform its duties under this Agreement. Employer understands that the Maximum Allowable Contributions are based solely on information provided to SchoolsFirst by Employer and Employer's employees.

3.0 TERM

In consideration for the performance of the services delineated herein, Employer promises and agrees that SchoolsFirst shall be the exclusive third party administrator, for the performance of said services with respect to the Employer's retirement plans that qualify under IRC Section 403(b), for a period of three (3) years, beginning the effective date of this Agreement and ending the December 31 following the second anniversary of the effective date of the Agreement. This Agreement shall automatically renew for a maximum of three (3), one (1) year terms following the completion of the prior term unless notice of intent to not renew is provided 30 days before the scheduled automatic renewal date. This Agreement may be terminated by either party without cause upon provision of sixty (60) days written notice.

SchoolsFirst or the Employer may terminate this Agreement for any reason upon sixty (60) days' written notice, but such termination shall in no manner affect any liability of the SchoolsFirst incurred prior to such termination. However, the Employer may terminate this Agreement at any time in the event of material and/or recurring breaches by the SchoolsFirst of its obligations hereunder.

4.0 INDEMNIFICATION

SchoolsFirst shall defend, hold harmless, and indemnify the Employer and its governing board, their officers, employees, and agents, from every claim, obligation, demand and suit at law or equity, which may arise out of, be connected with or be made by reason of the breach of SchoolsFirst of the terms and provisions of this Agreement, and shall satisfy any judgment rendered or settlement against any indemnified parties, except for liability resulting from the gross negligence, willful misconduct, actual fraud or criminal conduct, of an indemnified party. The Employer shall notify SchoolsFirst within a reasonable amount of time upon the receipt of any such claim, demand or suit. SchoolsFirst also agrees to indemnify the Employer for penalties and interest payments imposed by the Internal Revenue Service, the Department of Labor or any other regulatory agency as a direct result of services provided under this Agreement, or SchoolsFirst failure to provide services as required under this Agreement, including inaccurate MAC limits provided by SchoolsFirst, so long as the information provided by the Employer and the employee/participant is materially accurate and complete.

5.0 MISCELLANEOUS PROVISIONS

5.1 Status as Investment Companies

SchoolsFirst warrants that at all times, the investment option providers whose shares are offered through the Accounts are regulated investment companies within the meaning of IRC Sections 403(b)(7)(c) and 851(a), are described as regulated investment companies in their current prospectuses declared effective under the securities Act of 1933, are eligible investments for the Accounts and are registered for sale with the State of California. SchoolsFirst shall advise the investment option providers of all requirements and rely on reasonable representations made by them.

5.2 Withholding

SchoolsFirst shall instruct the investment option provider or other disbursing agent to comply with all applicable withholding rules relating to distributions to employees and beneficiaries, and advise the investment option provider to file all required information returns relating to such distributions.

5.3 Privacy of Employee Information

SchoolsFirst acknowledges that in the course of carrying out its duties under this Agreement it may receive confidential information relating to the Employer's employees. SchoolsFirst, its agents or affiliates, agrees not to use such information beyond the purpose for which it was provided and not to disclose such confidential information to other parties, other than its agents or affiliates as required for SchoolsFirst to fulfill the responsibilities as stated in this Agreement, except to the extent required by the Internal Revenue Service, by law, or with the consent of the Employer or employee. Additionally, SchoolsFirst, its agents or affiliates agree to take appropriate steps to secure such confidential information from misuse or unauthorized disclosure.

5.4 Solicitation and Directives

SchoolsFirst, its agents, and representatives shall comply with all pertinent written directives from the Employer regarding the solicitation of employees of the Employer and the purchase of Accounts and Annuities. No contact of employees shall be made on premises of the Employer in person by telephone or by other means except as approved by the Employer.

5.5 Cooperation from Company

SchoolsFirst shall, in the event of an audit by the Internal Revenue Service, an internal audit by Employer or a third party firm designated by the Employer, or in any other instance in which Employer requires it, promptly provide necessary information as requested by Employer for 403(b) or 401(a) accounts held by SchoolsFirst for employees of Employer.

5.6 Prior Agreements

This Agreement supersedes and replaces any and all prior agreements of SchoolsFirst regarding the offering and administering of Accounts and Annuities to employees of the Employer.

5.7 Alteration of Terms

No alteration or variation of the terms of this Agreement shall be valid unless the parties mutually consent in writing to such alterations or variations.

5.8 Governing Law/Venue

This Agreement shall be construed, administered and enforced in accordance with the laws of the State of California, and in conformity with IRC Section 403(b). The Parties specifically agree and recognize that all disputes between the Parties, their agents, affiliates, representatives, employees, successors or assignees, arising directly or indirectly from the services and obligations contemplated by this Agreement or any contemporaneous agreement between the Parties, shall be determined by binding arbitration to the full extent provided by law. The Parties agree that such arbitration shall be held in the State of California, in the County of Orange, before a panel of three neutral arbitrators under the Commercial Arbitration Rules of the American Arbitration Association. Judgment upon an award of the arbitrators may be entered and enforced in any court having jurisdiction. The Parties to such dispute will equally share the fees and expenses of the arbitrators. The Parties agree that each Party in any such arbitration shall bear the cost of their own attorney's fees. The Parties specifically waive the right to seek remedies in court, including the right to jury trial. Nothing herein shall be interpreted to limit the rights of any Party to seek injunctive or equitable relief pending arbitration.

5.9 Severability

If any provision of the Agreement is determined to be illegal, unenforceable, or invalid, the remaining provisions of this agreement shall not be affected and shall remain in force and effect.

5.10 Assignment

SchoolsFirst shall not assign any rights or obligations under this agreement to a third party without the written consent of the Employer.

5.11 Extraordinary Circumstances

No Party to this agreement shall be held responsible for the delay or failure to perform services obligations under this Agreement when such delay or failure is due to fire, flood, epidemic, strike, an act of God or any public enemy, unusually severe weather, failure or malfunction of any electronic, electric or mechanical equipment, legislative or regulatory acts of any public authority, delays or defaults caused by public carriers, or other circumstances which cannot reasonably be forecast or provided against.

5.12 Limitation of Authority to Act

No Party to this agreement shall have any authority to incur any expense or obligation of any kind or nature, in the name of or on behalf of any other Party, without express written authority.

5.13 Insurance Requirements

SchoolsFirst shall, at SchoolsFirst's sole cost and expense, take out prior to commencing the work, and maintain in force and effect, from the commencement of services until expiration of the contract a policy or policies of insurance covering

SchoolsFirst's services and furnish to Employer a certificate of insurance evidencing all coverage and endorsements required hereunder. SchoolsFirst shall identify employer as a certificate holder under its Professional Liability Insurance coverage. Such insurance shall be with an insurance company admitted by the Insurance Commissioner of the State of California. Minimum coverage shall be as follows:

- a. General Liability Insurance for injuries including accidental death, to any person in an amount not less than **\$1,000,000 Per Occurrence.**

Professional Liability Insurance in an amount not less than **\$1,000,000 Per Occurrence.**

- b. Statutory Workers Compensation Insurance in accordance with Sections 3700 and 3800 of the Labor Code of the State of California.
- c. Company shall provide a thirty (30) day written notice in advance to Employer of cancellation or reduction in coverage.

5.14 Conflict of Interest

During the course of this Agreement, should conflicts of interest arise between SchoolsFirst and Employer, Company shall immediately notify Employer of conflict.

5.15 Compliance with Law

Company shall be subject to and shall comply with all Federal, State, and local laws and regulations applicable with respect to its performance under this Agreement including but not limited to: licensing, employment and purchasing practices, and wages, hours and conditions of employment, including nondiscrimination.

5.16 Fee for Services

As consideration for the services provided hereunder, SchoolsFirst shall receive a \$2.00 fee per actively contributing participant per month. Employer authorizes SchoolsFirst to bill this fee to the investment option providers selected by plan participants. Employer shall have no financial obligation to SchoolsFirst for services performed by them pursuant to this Agreement.

CONTACT PERSONS FOR PURPOSES OF THIS AGREEMENT

Forest Charter School
Contact Person:

Name:

Phone Number:

Mailing Address as to the Agreement:

SchoolsFirst Plan Administration
Contact Person

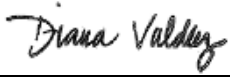
Name: Tony Romero
Phone: 800.462.8328 ext. 4727

Mailing Address as to this Agreement:
SchoolsFirst Plan Administration
1200 Edinger Avenue.
Tustin CA 92780

EXECUTION OF AGREEMENT

SchoolsFirst Plan Administration

Forest Charter School

By: 
AUTHORIZED REPRESENTATIVE

By: _____
AUTHORIZED REPRESENTATIVE

Diana Valdez
PRINT NAME

PRINT NAME

Vice President, Retirement Planning & Administration
TITLE

TITLE

10/27/2025
DATE

DATE