

## **Yosemite Community College District**

### **District Fiscal Advisory Council (DFAC)**

Thursday, June 20, 2019

1:00 p.m.

District Office Building, Conference Room A & Manzanita Building, President's Conference Room

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## **Agenda**

1:00 p.m. to 1:10 p.m.	Roll call Approval of the minutes from the May 16, 2019 meeting
1:10 p.m. to 1:20 p.m.	Monthly Financial Status Update
1:20 p.m. to 1:50 p.m.	2019-2020 Tentative Budget Discussion
1:50 p.m. to 2:10 p.m.	Consultant Resumes for the new Resource Allocation Model
2:10 p.m. to 2:40 p.m.	Potential Bond Discussion
2:40 p.m. to 3:00 p.m.	General Discussion

**Next Meeting:** July 18, 2019



**UNAPPROVED MINUTES**  
**Yosemite Community College District**  
**District Fiscal Advisory Council (DFAC)**  
**May 16, 2019**

**Present:** Jenni Abbott, Shelley Akiona, Kevin Alavezos, Florida Arias, Ashley Griffith, Josh Hash, Judy Lanchester, Amy Lovett, Crista Noakes, Sarah Schrader, Nancy Sill, Trevor Stewart, Susan Yeager, Henry Yong

**Council Members Absent:** Coni Chavez, Elissa Creighton, Doralyn Foletti, Pam Guerra-Schmidt, Melissa Raby, Brian Sanders, Jennifer Zellet, ASMJC Student Designee, ASCC Student Designee

**1. Acceptance of the Minutes of the March 21, 2019, District Fiscal Advisory Council**

Consensus was met to approve the minutes. The minutes are approved.

**2. Institutional Innovation & Effectiveness Plan**

Dr. Yeager reminded the Council the Institutional Innovation & Effectiveness Plan was discussed at the March meeting. Consensus was met to proceed with hiring a consultant for the new Resource Allocation Model (RAM). The IEPI Plan was submitted to the IEPI group for review. Completed items on the Plan include the membership list and charge. The IEPI Plan was reviewed and signed by the MJC and CC Presidents of the Academic Senate prior to submission.

Dr. Yeager opened the conversation up for comments. Jenni Abbott, MJC LTAC Representative, asked if time allowed for the RAM to be submitted through the College Governance process. Dr. Yeager explained the RAM impacts everyone and will be submitted through a number of processes. Kevin Alavezos asked if a designee will be appointed at the college level in the absence of the MJC Vice President of College and Administrative Services. Dr. Yeager suggested Dr. Houpis, MJC College President have the opportunity to determine how to move forward during recruitment of the new Vice President.

Dr. Yeager will inform the DFAC when the grant monies are received.

**3. 2018-2019 Budget**

Dr. Yeager explained the District was supposed to receive approximately \$8.9M more than received for the 2017-2018 allocation. The District anticipated STRS and PERS increases over three years. Once the funds were allocated for the raises given, the remaining funds were slated to go out to



the Colleges and Central Services in one-time funds for College and District-wide initiatives. The State Chancellor's office sent out an email in March reporting a deficit factor. The District's share was determined to be \$5M. At the time, the District estimated revenues to be lower so the impact on the District would be approximately \$2M to \$3M. The hope was the deficit factor would decrease as the income tax and property tax revenues had not been received.

Dr. Yeager explained the week before May revise the State Chancellor's office held a webinar regarding the revision of P1 to be 2017-2018 TCR plus COLA for the Districts on the wrong side of the Student Centered Funding Formula (SCFF). The remaining Districts would be 2017-2018 TCR plus 8.13%. Based on that information, YCCD staff determined the ceiling of the deficit factor to be \$103M and the floor to be at \$101M. The webinar reported additional information would be provided at May revise.

A complete write-up of Community Colleges was provided at May revise. The 2019-2020 budget included the addition of \$39.4M in instructional equipment and scheduled maintenance funds and on-going funds towards Strong Workforce. Information provided on the current 2018-2019 budget reported most of the revenues were made up however, there is still a shortfall of \$228M. Dr. Yeager explained District staff will work to determine what that means for YCCD.

Dr. Yeager reported out on the budget augmentation based on the list submitted to the District Administrative Council (DAC) and District Council (DC). The list included items at the College and District levels. She explained the only augmentations included in the 2018-2019 Amended Budget were for legal costs and the MJC Pool Repair Project. The remaining \$2.3M will be held while the final budget information is reviewed. Dr. Yeager stated any funds remaining from the \$2.3M will be provided to the Colleges and District-wide initiatives via the list approved at DAC and DC.

Dr. Yeager explained there were mid-year changes to the SCFF. The changes impacted Districts with enrollment and FTES associated with the programs. Dr. Yeager explained the District would have been in financial trouble had the one-time initiatives been spent by the Colleges as the State is asking some Districts for money back. Trevor Stewart, CC Vice President of College and Administrative Services explained the two Colleges were provided an estimate and asked to prepare a spending plan for the Board of Trustees to review and approve. He explained the Colleges were never allocated the funds to actually spend on those projects.



#### **4. 2019-2020 Budget**

Dr. Sarah Schrader, Controller, provided a draft 2019-2020 tentative budget book. The budget book will be presented to the Board of Trustees in June. Dr. Schrader explained the budget book looks different as the Board of Trustees requested more information be provided on more funds. Specific information related to the College budgets has been added. Dr. Schrader explained the prior budget book only included the Unrestricted General fund revenues, single line items for the Colleges for expenditures, the Restricted General fund, Capital Outlay and the Measure E Bond fund. The new budget book includes the Unrestricted General fund, the Restricted General fund, Capital Outlay, Measure E Bond fund, Bookstores, Cafeteria, Farm Operations and other Trust funds such as Financial Aid, Student Representative Fee Fund and the Student Center Fund. The funds have been broken out by location.

Dr. Schrader conducted a brief overview of the draft budget book noting the Mission Statement, Governors' Budget and major revenue and expenditure budget assumptions and fund descriptions for the different types of funds. Dr. Schrader noted on page five of the draft book, that due to the timing and preparation of the tentative budget, any changes to the Governor's budget as outlined in the May revise and ultimately the State's final budget will be taken into consideration during the preparation of the District's final budget. The tentative budget is based on the Governor's January budget.

Dr. Schrader invited the DFAC to provide input on the new budget book. Dr. Yeager explained the draft tentative budget book will be provided to the Board Finance Committee and the Board of Trustees in June. The tentative budget provides the District spending authority for the new fiscal year. The final budget will be approved by the Board of Trustees in September. Dr. Yeager acknowledged Dr. Schrader and Jackie Hernandez, Executive Secretary for the Controller's Office for their efforts in developing the new budget book.

#### **5. Resource Allocation Model (RAM)**

##### **A. YCCD Resource Allocation Model**

Dr. Yeager provided a handout of the current YCCD RAM. She reported the current RAM was revised in 2014-2015 to align with the prior funding formula, SB361. The intent of RAM is to cover the operational and fixed costs of the District Office first and then allocate funds to the Colleges. The goal of an educational institution is to meet the goals of the students. It is important to get as much money out to the colleges as possible. Dr. Yeager explained CS will continue to do what they can to keep costs down; however, CS still has to provide services to the Colleges and meet judiciary and regulatory requirements.



Dr. Yeager provided an overview of the current YCCD RAM packet that provides the Budget Allocation Model. In previous years, the Colleges would provide the FTES targets followed by projected growth. Dr. Yeager explained at times, COLA is the only increase the District may receive in a year meanwhile, PERS and STRS fees and other operating costs are rising. Per the current RAM, those items should be taken into consideration first. The District is currently over Faculty Obligation Number (FON).

Dr. Yeager explained that moving forward, the goal is not to roll summer FTES and report only FTES achieved. Last year, the District rolled 333 FTES. Nothing will be rolled this year. The projected FTES is 15,938 and includes early start Summer. This strategy will allow the District to go into the 2019-2020 fiscal year with no debt. Dr. Yeager explained the Governor has proposed extending the hold harmless one year. Jenni Abbott asked for the breakdown in percentages moving into the new year. Per Dr. Yeager, the percentages are 51% for MJC, 12% for CC and 27% for CS.

Trevor Stewart explained many of the CS expenses are used towards the Colleges. Dr. Yeager reported we are budgeting for \$116M in expenditures. In her opinion, many of the expenditures are District-wide such as the unfunded retiree liability line item, health fund transfers and CalSTRS On-Behalf payment and all of those expenditures were included in previous percentages. The change in the percentages will be determined once the \$5M is allocated first to the District-wide projects then to the Colleges with MJC receiving 85% and CC receiving 15%. Trevor Stewart asked if the one-time initiatives will ever be assigned to the Colleges as on-going dollars. Dr. Yeager explained it depends where the District lands in the new SCFF.

#### B. Other Multi-District Resource Allocation Models

Dr. Yeager has been reaching out to other multi-college districts to gain knowledge on their RAM's. She reported all of the Districts with the exception of one was utilizing a formula for all new dollars. A percentage of those dollars is given to the unions. The union dollars are used for raises and increases in STRS, PERS and health costs. The process allows the groups to understand the limited revenue coming in to the District. Some Districts have a clause in their agreements stating they can take back funds allocated to the unions and that this can be a disadvantage especially when unusual things occur such as the State requesting dollars back from Districts.

Dr. Yeager explained other multi-college Districts do not charge district-wide activities to CS. Dr. Schrader explained that the majority of the 27% allocated to YCCD CS is spent on the Colleges. The CS allocation is significantly less at other multi-college Districts because more items are allocated out to the colleges such as custodial, technology, grounds, utilities, security and some HR practices.



Dr. Schrader explained each of the Colleges as well as CS are assigned a responsibility code relating to facilities, information technology and utilities. She explained one resolution is to dig deeper into the CS budget to determine how much time each position is supporting the Colleges by allocating payroll or licensing fees to each location but there is a cost associated with breaking the budget out in that manner.

Dr. Yeager reported she will continue to talk to CBO's at other Colleges to understand their models and will provide the DFAC a report of models used at other multi-college Districts. Nancy Sill asked how the multi-college District's Dr. Yeager spoke to were able to be innovative in their spending if each new dollar is allocated. Trevor Stewart stated in his experience, the innovation comes from the one-time funds allocated to the Colleges. Dr. Yeager stated she is aware of Foundations that have raised money to provide an innovation fund.

Chancellor Yong explained as a previous President, he was forced to become innovative with finding funding through grants which were often times competitive. He suggested giving things time by allocating funds each year to an innovative plan or project then executing once the funds are established. Florida Arias, Interim MJC Vice President of Student Services explained we are innovative in many ways such as restructuring Student Services at MJC and moving forward with the Pathways framework. She explained we are redesigning our College for the next century and asked that the DFAC remind themselves they are innovative and working constantly to reinvent ourselves to answer the needs of our community members.

## **6. Close/Next Meeting**

Dr. Yeager reminded the DFAC to send agenda items to her office.

The next District Fiscal Advisory Council meeting will be held on **Thursday, June 20, 2019, at 1:00 p.m.** in the YCCD District Office, Meeting Room A, located at 2201 Blue Gum Avenue, Modesto, CA and Columbia College Manzanita Building, President's Conference Room located at 11600 Columbia College Drive, Sonora, CA.





**Monthly Financial Report for General Fund**  
**Yosemite Community College District**  
**For Month Ended May 31, 2019**

	<b>2018-19 Amended Budget</b>	<b>2018-19 Month End May 2019</b>	<b>2018-19 Fiscal YTD %</b>	<b>2017-18 Fiscal YTD %</b>
<b>1 Beginning Balance, 7/1</b>	17,374,180	17,374,180		
<b>Revenue:</b>				
<b>Unrestricted</b>				
2 State Apportionment	104,415,243	92,863,189	88.94%	93.54%
3 State - Other <sup>(1)</sup>	720,000	629,992	87.50%	77.86%
4 Non-resident Tuition	575,000	706,806	122.92%	109.10%
5 Interest	180,000	411,228	228.46%	84.65%
6 CalSTRS On-Behalf Revenue <sup>(2)</sup>	2,500,000	-	0.00%	0.00%
7 Other <sup>(3)</sup>	622,000	698,382	112.28%	208.66%
8 Designated Lottery	2,365,000	2,087,360	88.26%	61.86%
<b>9 Total Revenue</b>	<b>111,377,243</b>	<b>97,396,957</b>	<b>87.45%</b>	<b>91.77%</b>
<b>10 Total Funds Available</b>	<b>128,751,423</b>	<b>114,771,137</b>	<b>89.14%</b>	<b>92.87%</b>
<b>Expenditures:</b>				
<b>Unrestricted</b>				
11 MJC	60,229,852	59,053,899	98.05%	95.91%
12 CC	14,173,007	13,424,586	94.72%	90.42%
13 CS <sup>(4)</sup>	31,631,591	27,470,664	86.85%	85.96%
14 CalSTRS On-Behalf Expense <sup>(2)</sup>	2,500,000	-	0.00%	0.00%
15 Transfers Out/Contingencies	4,806,823	2,503,500	52.08%	55.82%
<b>16 Total Expenditures</b>	<b>113,341,273</b>	<b>102,452,649</b>	<b>90.39%</b>	<b>89.88%</b>
<b>17 Ending Balance</b>	<b>15,410,150</b>	<b>12,318,488</b>		

<sup>(1)</sup> State - Other consists of revenue received for Board of Governor's (BOG) fee waivers administration, part-time faculty compensation, and the baccalaureate program.

<sup>(2)</sup> Per Governmental Accounting Standards Board (GASB) No. 68, the District is required to record the CalSTRS On-Behalf Contribution made by the State in the fund financial statements. This entry is calculated at year end and has a net effect of zero as the District records the revenue and expense for the same amounts.

<sup>(3)</sup> Other consists of funds received for federal forest tax revenue, state mandated cost reimbursement, miscellaneous revenue, revenue from the sale of equipment and supplies, and one-time state funding allocations.

<sup>(4)</sup> CS expenditures include expenditures for Central Services: District-Wide, Central Services: MJC, and Central Services: CC. For Central Services: MJC and Central Services: CC, these expenditures include building maintenance & repairs, custodial services, operations & maintenance, grounds maintenance & repairs, utilities, and information systems/technology. Below is the breakout of expenditures by "location":

CS: District -Wide	\$ 15,498,713
CS: MJC	\$ 9,472,037
CS: CC	\$ 2,499,914







## General Fund – Unrestricted Fund 11 (summary of p.7)

Description	2018-2019 Amended Budget	2018-2019 Projected Actuals	2019-2020 Tentative Budget
<b>Total Revenues</b>	\$111,377,243	\$ 110,420,882	\$ 116,334,520
<b>Total Expenditures and Contingencies/Transfers Out</b>	\$113,341,273	\$ 109,119,000	\$ 116,334,520
<b>Net Activity</b>	(1,964,030)	1,301,882	----
<b>Beginning Fund Balance</b>	\$ 17,374,180	\$ 17,374,180	\$ 18,676,062
<b>Ending Fund Balance</b>	<b>\$ 15,410,150</b>	<b>\$ 18,676,062</b>	<b>\$ 18,676,062</b>
<b>% of Fund Balance to Expenditures</b>	13.60%	17.12%	16.05%
<b>Full Time Faculty (Budgeted)</b>	<b>303</b>	<b>303</b>	<b>306</b>



## Unrestricted General Fund – Fund Balance (p.7)

Description	2018-19		2018-19		2019-2020	
	<u>Amended Budget</u>	<u>Projected Actuals</u>	<u>Projected Actuals</u>	<u>Tentative Budget</u>	<u>Tentative Budget</u>	<u>Tentative Budget</u>
<b>Beginning Fund Balance</b>	<b>\$17,374,180</b>	<b>\$17,374,180</b>			<b>\$18,676,062</b>	
Reserve for Encumbrances, Prepaids, Inventory	\$ 500,000	\$ 500,000	\$ 500,000		500,000	
Required Reserve (Board Policy 6305)	10,300,000	10,460,000			10,550,000	
Reserve for PERS & STRS Rate Increases	3,000,000	3,000,000			3,000,000	
Reserve for One-Time Initiative Projects	-	2,303,323			2,303,323	
Undesignated	1,610,150	2,412,739			2,322,739	
<b>Total Ending Fund Balance</b>	<b>\$15,410,150</b>	<b>\$18,676,062</b>			<b>\$18,676,062</b>	



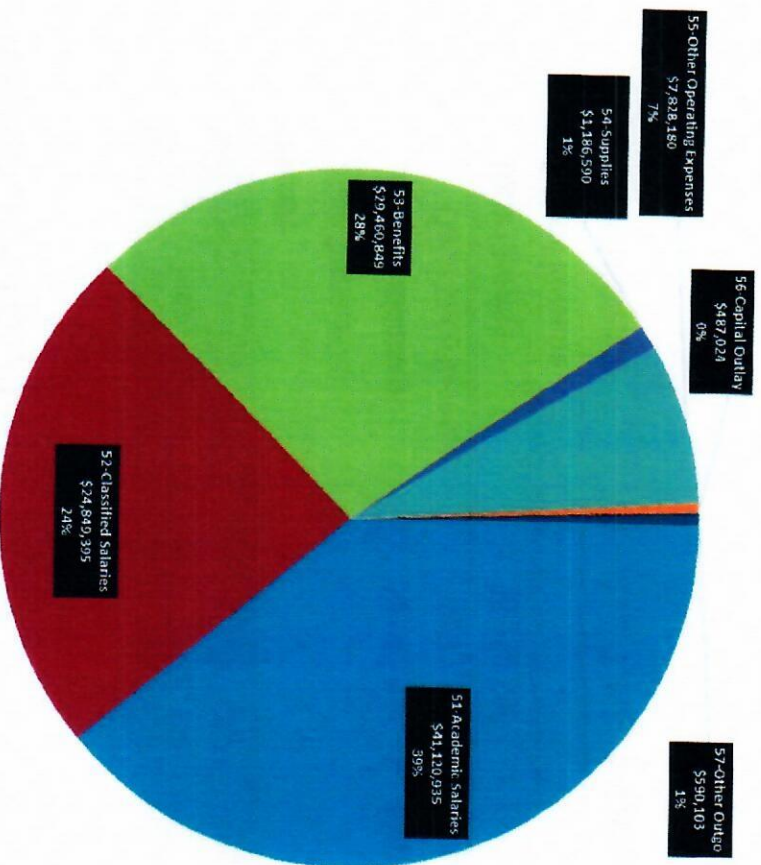
# General Fund – Unrestricted Fund 11 Revenues (p.7)



Description	2018-19	2018-19	2019-2020
	<u>Amended Budget</u>	<u>Projected Actuals</u>	<u>Tentative Budget</u>
<b>Revenue</b>			
State Revenue			
Apportionment	\$ 52,045,964	\$ 53,836,040	\$ 54,077,000
Other State Revenue	4,072,674	4,440,927	4,611,000
Local Revenue	55,258,605	52,142,838	57,646,520
Federal Revenue	-	1,077	-
<b>Total Revenue</b>	<b>\$ 111,377,243</b>	<b>\$ 110,420,882</b>	<b>\$ 116,334,520</b>



## District Unrestricted GF Expenditures (p.7)

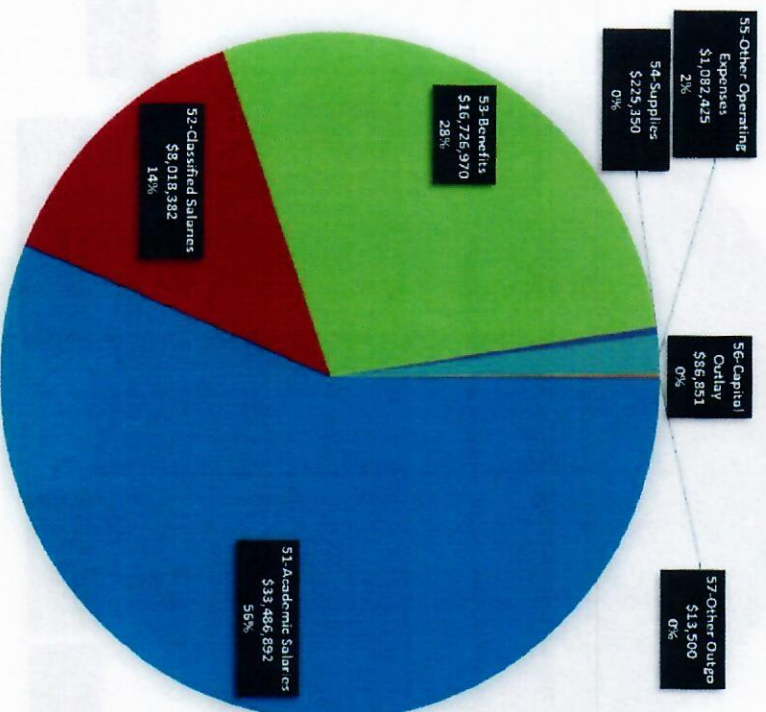


**\$105,523,076**





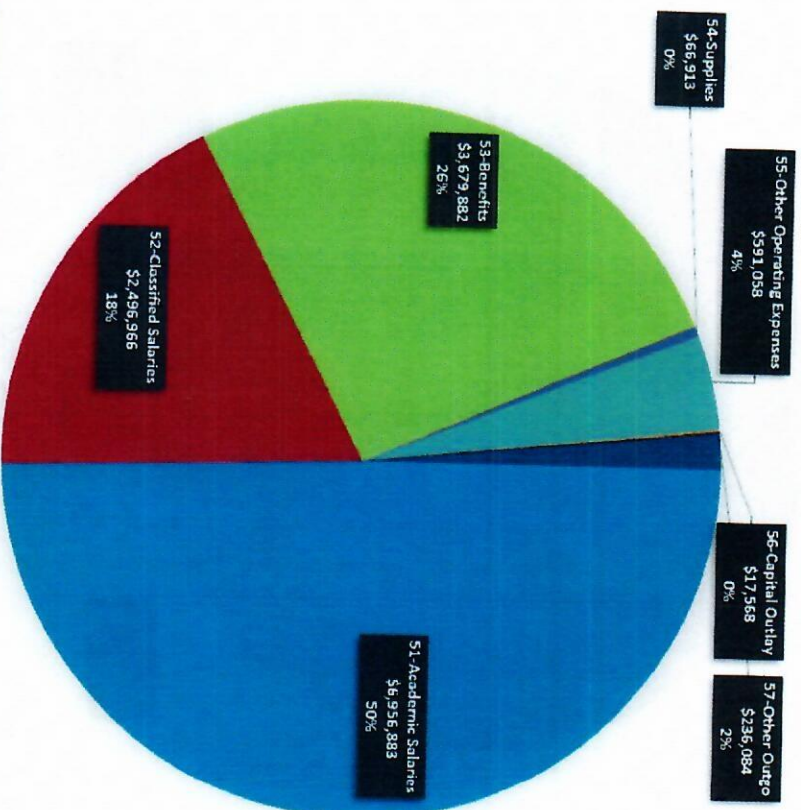
## MJC Unrestricted General Fund Expenditures – (p. 8)



\$59,640,370



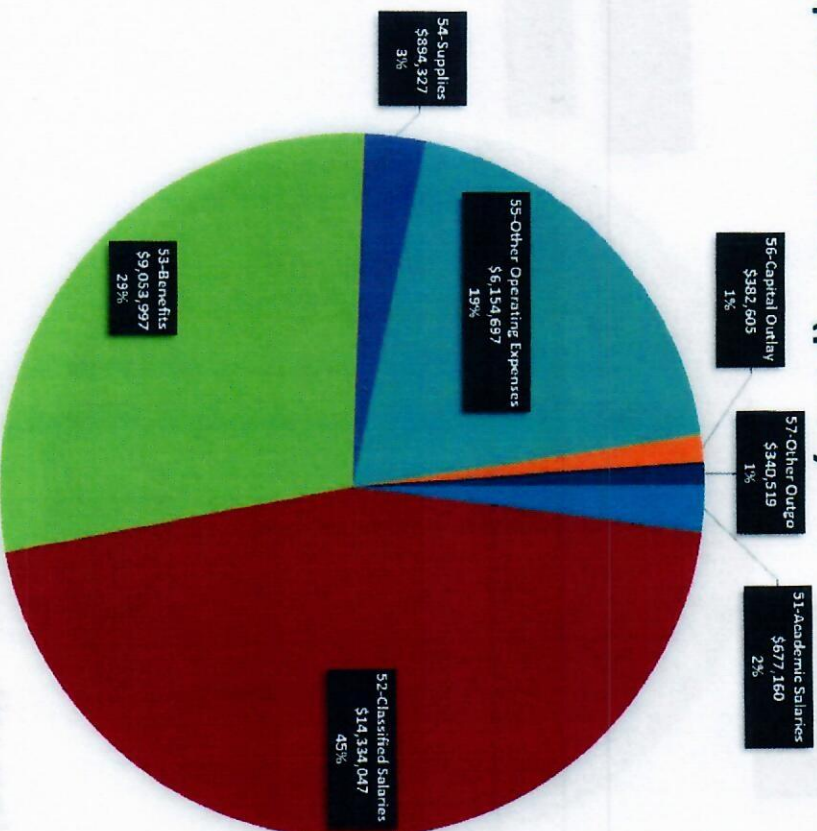
## Columbia College Unrestricted GF Expenditures – (p. 9)



**\$14,045,354**

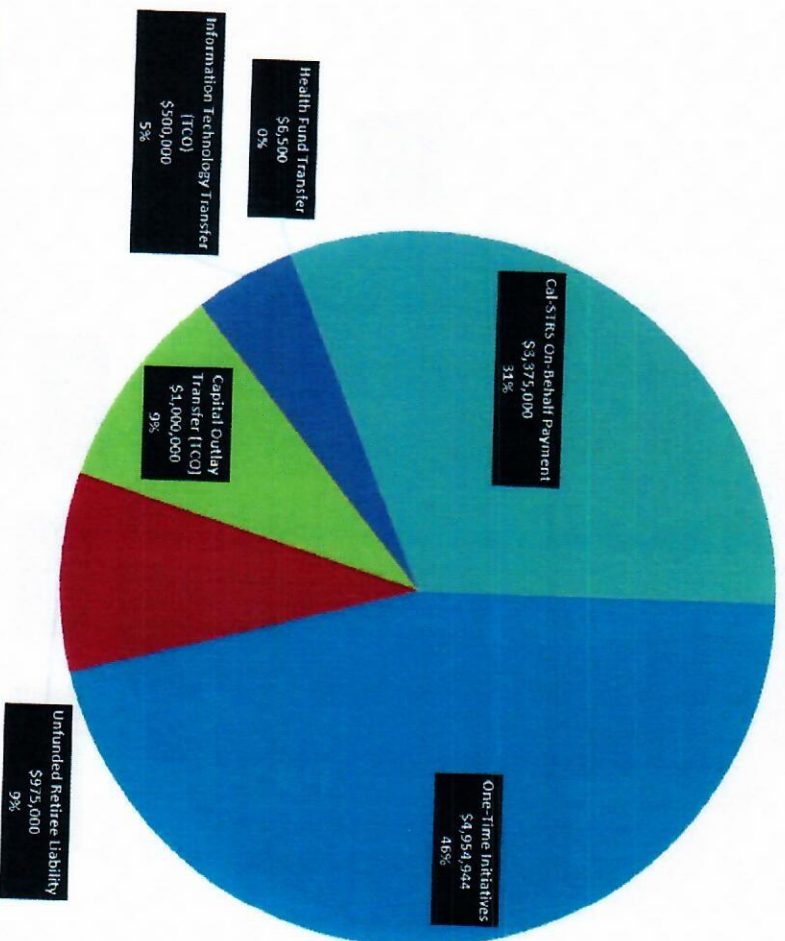


# Central Services Unrestricted GF Expenditures – (p. 10)



\$31,837,352

## Contingency GF Expenditures – (p. 11)



**\$10,811,444**



**Kathryn L. Blackwood**  
**128 Rincon St**  
**Santa Cruz, California 95060**  
**(831) 425-2781**

## **SUMMARY OF QUALIFICATIONS**

- Can be counted on to get the job done
- Thirty years of administrative and accounting experience with increasing responsibilities and job complexity
- Skilled in project management
- Highly valued and effective leader, supervisor and co-worker

## **PROFESSIONAL EXPERIENCE**

### **Professional Skills**

- Led the development of a district-wide strategic plan adopted by the Board of Trustees that included the implementation of a College Promise Program.
- Provided leadership and direction for accounting, auxiliary (bookstore, cafeteria & fitness center), budget, grants, accounts payable, payroll and purchasing departments.
- Formulated, developed and implemented policies and procedures for a variety of departments and functions.
- Dealt tactfully, cooperatively and effectively with college staff and board, as well as local, state and federal agencies.
- Set priorities, acted independently and functioned well under pressure.
- Reviewed contracts and reports for terms and conditions, accuracy, detail and clarity.
- Supervised, trained, audited and evaluated the work of accounting, personnel and teaching staff.
- Served as Chief Negotiator with faculty and classified unions; successfully negotiated 3 year contracts with a formula for total compensation based on revenues.
- Provided leadership and direction to develop all policies and procedures for the board, personnel and parents of a private school.

### **Budgetary Analysis**

- Developed, promoted district-wide consensus and recommended policy changes to accomplish budgetary goals.
- Developed resource allocation model for a 3-college district and achieved consensus across the district for the new model.
- Directed district budget development process in conjunction with college and district management and staff.

## **Kathryn L. Blackwood - page 2**

- Prepared annual district budgets and monitored budgets to assure that funds are properly expended and limits are observed.
- Analyzed budgets and recommended revisions required to meet changing funding situations or service needs.
- Conferred with and assisted directors and managers regarding budgets, expenditures and reporting schedules.
- Developed enrollment management tools to budget and monitor WSCH per FTEF and part-time faculty budgets.

### **General Accounting**

- Led task force to implement in-house payroll for 2,000 employees.
- Implemented collections program for college, including multi-step action plans
- Operated several different computerized accounting systems involving A/P, A/R, P/R, G/L, Purchasing, Encumbrances, Financial Aid, Student Information Systems, Human Resource Systems and Institutional Research data bases.
- Assisted in evaluating commercially-supplied software for application to budgeting, grants administration and other fiscal office functions.
- Brought college district from "Qualified" audit to "No Exceptions" within 1 year.

### **EMPLOYMENT HISTORY**

7/11-5/19	Executive Vice Chancellor, San Mateo County Community College District, San Mateo, CA
2/04-6/11	Chief Financial Officer – San Mateo County Community College District, San Mateo, CA
7/91-2/04	Budget Officer - Foothill-De Anza Community College District, Los Altos Hills, CA
11/94-9/95	Interim Director of Budget & Personnel - De Anza College (concurrent)
5/89-7/91	Grants Monitor - Foothill-De Anza Community College District
6/92-8/94	President - Vineyard School Board of Directors, Santa Cruz, CA
6/90-6/92	Treasurer - Escuela Pacifica School, Santa Cruz, CA
9/88-9/90	President - Glen Arbor School Board of Directors, Ben Lomond, CA
11/83-5/89	Grants Manager - Food & Nutrition Services, Aptos, CA
2/80-11/83	Senior Accounting Clerk - Southland Corp., Corte Madera, CA

### **EDUCATION & TRAINING**

Western Governors University, Salt Lake City, UT; MBA in Strategy and Leadership  
San Jose State University, San Jose, CA; BS in Business Administration  
Napa College, Napa, CA; Accounting  
University of Michigan, Ann Arbor, MI; Linguistics



**KEN STOPPENBRINK**

1841 MALIBU DR.  
COALINGA, CA. 93210  
(559) 934-0413

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**EXPERIENCE**

10/04-2019 **VICE CHANCELLOR BUSINESS 2004 TO 2013 AND DEPUTY CHANCELLOR FROM 2013 TO 2019**

West Hills Community College District  
9800 Cody St.  
Coalinga, CA. 93210

Responsible for the oversight of all fiscal matters pertaining to the District. Oversee all areas of Human Resources and Business Office. Monitor and report the progress of the COP program to the financing corporation on a monthly basis. Serve on the negotiations team of the District for the CTA and CSEA Collective Bargaining Agreements. Provide oversight to the Budget process for the District. Serve on the Board of Directors for the JPA Insurance/Risk Management program.

ITS and Child Development were direct reports to me for about three years each.

**Developed and recommended the resource allocation policy and procedure when the district went from a single to a multi-college district in 2004.**

Implementation of our utilities conservation program resulted in an annual savings exceeding \$ 200,000.

During this time I have served on the facilities committee for the construction projects and have helped facilitate the sale of the old farm and subsequent relocation of those assets to the farm of the future.

Over the past 5 years I have kept the trustees up to date with our financial status and the impact of labor negotiations on our future budgets. As a result of the close monitoring of our fiscal assets the district has been able to increase its capital projects budget and at the same time keeping the reserve over 10%.

When the Chancellor was out for vacation or other business activities I was in charge of those times and covered any concerns or issues that may have developed.

Participated in two separate New Market Tax Credit deals, NMTC, over the past three years which yielded about \$ 6 million in revenue to the district. Those funds were able to provide scheduled maintenance and also pay for the solar farm at the Farm of the Future and also provide resources for additional parking in Lemoore.

There were several bond measures since 1998 including the most recent ones in 2008, SFID 1, 2 and 3, which I was involved with to ensure passage. The most recent bond measure T which was our technology

bond that provides \$ 20 million over the next 20 years for purposes of replacing equipment and upgrading infrastructure.

11/96 -09/04 **DIRECTOR HUMAN RESOURCES/E.E.O.**

West Hills Community College District  
9900 Cody St.  
Coalinga, CA. 93210

Responsible for maintaining all Human Resource Management policies and administering the Education Code. Organize and Administer recruitment efforts for the District. Serve as co-chair for the risk management committee. Administer the Drug and Alcohol program testing program for our DOT programs. Develop policies and procedures. Serve on staff development committee.

Serve on negotiations team for the District. Provided training for and participated in Interest Based Bargaining for the Executive Board and the California Teachers Association. Responsible for the Staff Diversity Plan Document revision and implementation. Provide training opportunities for Staff Diversity, Equal Opportunity and Professional Development. Over the past 8 years I was responsible for the hiring processes that doubled the number of Faculty and Staff in an effort to accommodate the growth of the District.

Provided input in the development and implementation of the Educational Reimbursement Policy. Provide input and responses to issues that surface during the governance process within the district. .

1/95 - 11/96 **ASSOCIATE ADMINISTRATOR HUMAN RESOURCES**

Coalinga Regional Medical Center  
1191 Phelps Ave.  
Coalinga, CA. 93210

Responsible for Human Resources/Public Relations/Risk Management/Plant Operations and Maintenance/Security/Transportation, Safety, and the Clinics. This facility is a 22 bed acute care and a 56 SNF bed facility with over 200 employees. I was responsible for the Salary and Benefit Administration of the district.

I was the Risk Manager and handled issues that were sensitive to the malpractice problems that would occasionally develop during my employment with the district.

4/80 - 11/93 **DIRECTOR HUMAN RESOURCES**

Dameron Hospital Association  
525 W. Acacia St.  
Stockton, CA. 95203

Direct and supervise all personnel and payroll functions for 1050 employees for 226 bed acute care hospital \$ 140 M annual revenue.



Developed Educational Reimbursement Plan.  
Assure uniformity in employee selection and hiring programs.  
Administer new employee orientation program. Negotiate fees with TPA'S for administration of benefit plans.  
Administer self-insured Workers Compensation and Health Insurance plans. Prepared contract proposals for labor negotiations for 7 collective bargaining units and served as negotiator for the organization.  
Communicate all policies through employee handbooks.  
Investigate causes of disputes and employee disciplinary problems.  
Designed Educational Assistance Program.  
Implemented L.T.D. plan with a combined P.T.O. system.  
Modified leave of absence policy saving \$ 85,000 per year.  
Negotiated third party contract for health plan administration saving \$ 200,000 per year. Modified PTO plan saving \$ 75,000 per year.  
Modified PPO services for health plan saving \$ 175,000 in expenses.  
Administered Affirmative Action Plan. Provide programs to increase awareness to all staff on Diversity issues.

#### **EDUCATION**

##### **ASSOCIATE ARTS DEGREE, BUSINESS 1974**

Shasta Jr. College, Redding, CA.

##### **BACHELOR OF SCIENCE, BUSINESS ADMINISTRATION 1976**

Chico State University, Chico, CA.

##### **MBA-E BUSINESS 2004**

University of Phoenix, Phoenix, Az.

#### **COMPUTER SLILLS**

IBM, Gateway, Dell Hardware and the following software. Windows 95, 98 and Windows NT ME, XP applications. Windows Office Suite 1995, 1997, 2000, and Office XP. Excel, Word, Power Point, Access, E-Mail., GIS-Arc View. Datatel.

#### **PROFESSIONAL/COMMUNITY**

Coalinga Chamber of Commerce Chairman of the Board 2002-2004  
ACCCA Human Resource Commissioner 1999-2004.  
Partnership for Excellence Task Force 2000.  
City of Coalinga Planning Commissioner 1999-2004; 2006-Current  
Co-Chair for ACHRO/AAO 98-99  
Past-president Rotary Club, Coalinga 1997-98; 2008-09  
Past-president of HHRMAC 90-91.

Served on CCLC task force for online database program. 2004  
Served on CCLC task force for GASB 45 JPA, and currently chair the  
Board of the JPA  
Serve as treasurer for the State Wide Association of Community Colleges  
JPA  
Member of the Coalinga Regional Medical Center from 2004-08.

#### **REFERENCES**

**Available upon request**

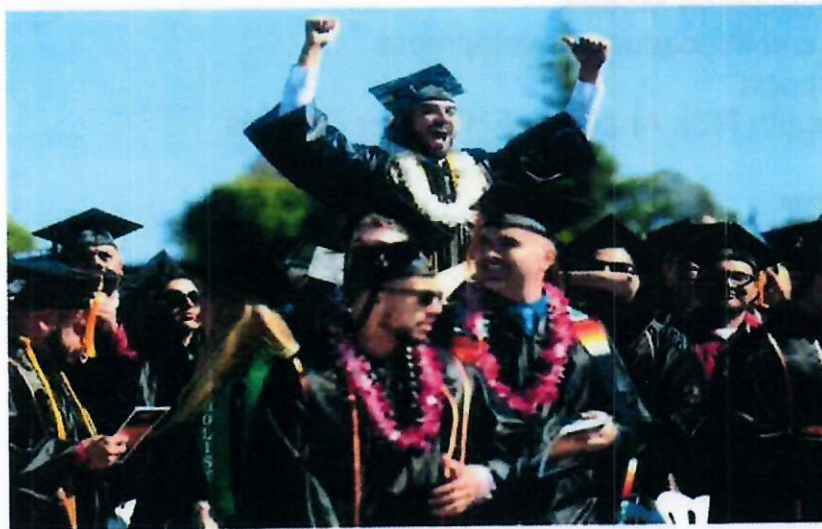




## Cambridge West Partnership, LLC

EDUCATION • FACILITIES • FISCAL • TECHNOLOGY

Cambridge West Partnership, LLC includes 15 members with extensive experience in various fields. These experts provide comprehensive educational, facilities, fiscal and technology resource planning and support to California Community Colleges. This team's unique experience positions CWP as a leading professional service provider for our system. Our services improve the college's ability to increase student achievement and overall success. All planning efforts are done in collaboration with end users focusing on carefully integrating plans into the unique fabric of each individual institution. Our goal is to jointly develop plans that are well thought out, easily understood, and are used to make institutional improvements.



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# **Our Services**

## ***Education***

- Education Master Plan
- Accreditation Support
- Support for Student Learning Outcomes & Student Assessment Strategies
- Curriculum Development and Review
- Enrollment Management
- Classroom Efficiency Study

## ***Facilities***

- Facilities Master Plan
- 5-Year Construction Plan
- Space Inventory
- Initial Project Proposal
- Final Project Proposal
- Capacity to Load Management
- Facility Planning for Bond Programs
- Total Cost of Ownership - Building Projects

## ***Fiscal***

- Student Centered Funding Formula
- 50 Percent Law
- Budget Allocation Models
- Policies and Procedure Development
- Audit Support
- Fiscal Health Risk Analysis (FHRA) for Districts

## ***Technology***

- Technology Plan
- Process Improvement
- Hardware & Software Analysis
- Total Cost of Ownership - IT
- Cloud Computing Services