INFORMATION SHEET 03.08.2022 TRUSTEES' MEETING

To: Jim Bridges

For: Board of Trustees

Prepared by: Emily Stroup

Re: Proposed Interim Contract for CBO and Resolution to Employ CalPERS Retiree

Due to the critical necessity of the CBO position to the district, the specialized skills required to fulfill such duties, and the district's recently unsuccessful attempts to recruit and hire someone permanently to this position; the district is recommending the temporary employment of Dena Whittington, subsequent to her retirement, and prior to the passing of 180 days since her date of retirement, for a duration not to exceed 960 hours, pursuant to Government Code sections 7522.56, 21221(h), and 21229.

RECOMMENDATION:
Approval of the Proposed Interim Contract for CBO and Resolution to Employ CalPERS Retiree.

EMPLOYMENT AGREEMENT
Between
JEFFERSON SCHOOL DISTRICT
And
DENA WHITTINGTON

INTERIM CHIEF BUSINESS OFFICER CONTRACT

THIS AGREEMENT is made this 8th day of March, 2022, by and between the Governing Board of the Jefferson School District ("District" or "Board") and Dena Whittington ("Interim Chief Business Officer"); collectively, the "Parties."

1. Term. District hereby employs Interim Chief Business Officer for an interim period beginning the 10th day of March 2022, and continuing day-to-day subject to the terms and conditions set forth below.

2. Salary. The Interim Chief Business Officer salary shall be Seventy One Dollars and Fourteen cents ($71.14) per hour. The payment of the Interim Chief Business Officer's salary shall be consistent with supplemental payroll procedures. On the 15th of each month, the Interim Chief Business Officer shall submit a timecard for the hours she worked for the District during the previous supplemental pay period of the 16th of the previous month through the 15th of the current month, to be paid on the 10th of the following month.

3. Other Benefits / Incentives / Compensation. Pursuant to Government Code section 21221(h), the Interim Chief Business Officer will not receive any benefits, incentives, compensation in lieu of benefits, or any other form of compensation in addition to the hourly rate set forth in section 2 above.

4. Interim Chief Business Officer Duties. The Interim Chief Business Officer shall perform the duties of the Chief Business Officer position while the District recruits for, and fills, this position.

5. Termination of Contract.

   a. Mutual Consent. This Agreement may be terminated at any time by mutual consent of the Board and the Interim Chief Business Officer.

   b. At Will Termination of Interim Chief Business Officer. The Interim Chief Business Officer may be terminated by either the Board or the District's Superintendent at any time for any reason pursuant to Labor Code section 2922.

   c. Employment of Permanent Chief Business Officer. This Agreement shall terminate upon the Board's employment of a new Chief Business Officer. However, the Board may require that the Agreement continue until the new Chief Business Officer reports for duty or receives training from the Interim Chief Business Officer.

   d. Automatic Termination at 960 Hours of Service. This Agreement shall terminate by its' own terms once the Interim Chief Business Officer has worked 960 hours pursuant to this Agreement.

6. Expense and Mileage Reimbursement. The Interim Chief Business Officer shall be reimbursed pursuant to District policy and upon documentation for necessary expenses incurred while performing her day-to-day duties and obligations, and she shall also be reimbursed for driving her personal automobile to and from the District at the current IRS approved rate per mile.

7. General Provisions.

a. Governing Law and Venue. This Agreement, and the rights and obligations of the Parties, shall be governed by and construed in accordance with the laws of the State of California.

b. Entire Agreement. This Agreement contains the entire agreement and understanding between the Parties. There are no oral understandings, terms or conditions, and the Parties have not relied upon any representation, express or implied, not contained in this Agreement.

c. No Assignment. The Interim Chief Business Officer may not assign or transfer any rights granted or obligations assumed under this Agreement.

d. Seniority. The Interim Chief Business Officer shall not be considered eligible for seniority or permanent status.

e. Modification. This Agreement cannot be changed or supplemented orally. It may be modified or superseded only by a written instrument executed by both of the Parties.

f. Severability. If any provision of this Agreement is held to be invalid or unenforceable by a court of competent jurisdiction, the remaining provisions of the Agreement shall continue in full force and effect.

Dated March ___, 2022

GOVERNING BOARD of the JEFFERSON SCHOOL DISTRICT
County of Stanislaus, California

_____ President	_____ Member
_____ Member	_____ Member
_____ Member	

INTERIM CHIEF BUSINESS OFFICER

_____ Date: March ___, 2022
Dena Whittington

BEFORE THE GOVERNING BOARD OF THE JEFFERSON ELEMENTARY SCHOOL DISTRICT

RESOLUTION TO EMPLOY CALPERS RETIREE PURSUANT TO GOVERNMENT CODE SECTIONS 7522.56, 21221(h) and 21229

RESOLUTION NO. 2022-03-01

WHEREAS, Dena Whittington ("Whittington"), the District's current Chief Business Official ("CBO") will retire under the CalPERS system effective February 28, 2022; and

WHEREAS, the District intends to employ Whittington, subsequent to her retirement, on an interim basis in the position of CBO, effective March 10, 2022, consistent with Government Code sections 7522.56, 21221(h) and 21229; and

WHEREAS, the position of CBO is a critically needed position requiring specialized skills that no employee in the District, other than Whittington, is capable of performing. The essential functions of this position include the following:

1. Responds to inquiries by Trustees, staff and the public regarding the budget and practices of the district.
2. Plans, organizes, and administers the district business activities including accounts payable, accounts receivable, general ledger, encumbrances, financial reports, federal, state, and local special fund accounting, fringe benefit record keeping, and cash flow analysis.
3. Prepares a variety of complex reports and correspondence relating to financial transactions of the district; and provides financial information for the Superintendent and Board of Trustees.
4. Directs and coordinates all district business activities, including purchasing, payroll, and financial management; responsible for establishing and monitoring sound financial systems.
5. Ensures all record keeping and reporting is in accordance with appropriate regulations, policies, and guidelines; recommends new policies as needed.
6. Monitors the purchase of all supplies and equipment.
7. Manages all insurance contracts and researches business problems of the system.
8. Prepares and administers the budget under the direction of the district Superintendent.
9. Prepares required fiscal and business reports.
10. Establishes and maintains complete fiscal accounting system and controls for general and special funds, student body funds, and school properties, including annual audits, inventories and accounting records.
11. Secures legal interpretation on district business issues as needed.
12. Prepares reports on the status of both district and school level budgets.
13. Serves as the primary financial advisor to the Superintendent, district managers, and site administrators in the management of district and school budgets.
14. Interprets and applies State laws, regulations, and procedures related to the financial management of public school districts.
15. Oversees Food Service, Maintenance, Operations and Transportation, and IT Department, and

WHEREAS, Whittington is qualified for employment in this position and has the requisite skills to perform these critically needed duties, having served in this position for 3 years in the District

prior to her retirement and having performed these specialized essential functions in this capacity herself; and

WHEREAS, the District has the need to fill this needed position with Whittington before 180 days have passed following her retirement; and

WHEREAS, the District has been engaged in the process of recruiting a permanent appointment for the position of CBO; attached hereto are a copies of the District's job announcements for this position which have been posted with EdJoin, ACSA and CASBO for the past two weeks. [Attached]

NOW, THEREFORE, the Board of Trustees of the Jefferson Elementary School District hereby finds, determines, and resolves as follows:

1. Pursuant to Government Code sections 7522.56, 21221(h), and 21229, Whittington is appointed on an interim basis to serve as Interim CBO to perform the above-identified essential functions during recruitment for a permanent appointment.

2. This appointment is necessary to fill a critically needed position before 180 days has passed since Whittington's retirement from CalPERS as no one else in the District has the knowledge or ability to perform these essential functions and the District has so far been unable to recruit and hire someone into this position.

3. Whittington shall be paid an hourly wage rate consistent with that paid to the District Chief Business Officer position.

4. Whittington's appointment by the District pursuant to this Resolution shall not exceed 960 hours.

APPROVED, PASSED AND ADOPTED by the Board of Trustees of the Jefferson Elementary School District this 8th day of March, 2022, by the following vote:

AYES: _____

NOES: _____

ABSENT: _____

ABSTAINED: _____

_____
Phil Raya
President, Board of Trustees
Jefferson School District

CERTIFIED A TRUE COPY

_____
Brian Jackman
Vice President, Board of Trustees
Jefferson School District

EDJOIN.ORG

Chief Business Officer **PLUS Hiring and Retention Bonus at Jefferson School District - Tracy

Jefferson School District
1219 Whispering Wind Drive Tracy, CA 95377 Phone: 209-836-3388
www.jeffersonschooldistrict.com

Job Information

Date Posted: 2/4/2022

Application Deadline: 2/25/2022 11:55 PM Pacific

Employment Type: Full Time

Length of Work Year: 252 Days

Salary: $127,431-$143,430 PLUS $5000 Hiring Bonus and $5000 Retention Bonus at 18 months

Number Openings: (At time of posting) 1

Contact: Vicky Ochoa

Email: vochoa@jsdtracy.com

Phone:

Job Summary

The Jefferson School District is seeking a highly motivated Chief Business Officer with emerging technical skills who is interested in being a collaborative team member in a growing district. This cabinet-level position works under the administrative direction of the Superintendent. The successful candidate will provide sound fiscal management services to the district in accordance with approved policies, procedures, and practices, serve as the primary advisor to the Superintendent in all matters related to the business operations of the district, and ensure that appropriate fiscal monitoring and maintenance systems are established and maintained.

Requirements / Qualifications

Bachelor's degree required or equivalent training in business, public administration, educational administration, accounting or economics. Three to five years of progressively responsible management experience in school business support operations, income/expenditure budgets, and personnel supervision, preferably in a public school district. Experience working in a school district or county office of education; or in a public accounting firm with significant experience in school district accounting, finance, and budgeting desired.

- Letter of Introduction
- Letter(s) of Recommendation (3 recent letters of recommendation (within the last year))
- Resume

Chief Business Officer

Jefferson School District

Details

Posted: 07-Feb-22

Location: Tracy, California

Type: Full Time

Preferred Education: 4 Year Degree

Salary: $127,431 - $143,430 + BONUS

Categories:

Chief Business Official – Chief Business Officer (CBO)

Salary Details:

$5000 Hiring Bonus and $5000 Retention Bonus at 18 months

The Jefferson School District is seeking a highly motivated Chief Business Officer with emerging technical skills who is interested in being a collaborative team member in a growing district. This cabinet-level position works under the administrative direction of the Superintendent. The successful candidate will provide sound fiscal management services to the district in accordance with approved policies, procedures, and practices, serve as the primary advisor to the Superintendent in all matters related to the business operations of the district, and ensure that appropriate fiscal monitoring and maintenance systems are established and maintained.

The successful candidate will be able to carry out significant school finance functions with minimal direction, accurately and within schedule deadlines. They will have experience working in a school

district or county office of education; or in a public accounting firm with significant experience in school district accounting, finance, and budgeting. They should have a working knowledge of the theory, principles, and practices of fund accounting and financial accounting including applicable sections of State Education Code, other applicable laws and the California School Accounting Manual, as well as knowledge of budget principles and techniques; applicable district policies and state laws and regulations; payroll management principles; district organization and functioning, research techniques and statistical principles and procedures; basic principles of data processing; and a basic working understanding of categorical programs.

About Jefferson School District

The Jefferson School District community takes great pride in its schools. The district's mission is to take collective responsibility for ensuring all students achieve at high levels. The district believes a high-quality educational program is achieved through shared responsibility among Trustees, staff, families, students, and community members. The District is located in south Tracy in San Joaquin County. The district currently has four schools with an enrollment of over 2,368 Kindergarten through eighth-grade students, and has two new schools starting construction soon. JSD continues to be among the top academic institutions in San Joaquin County, an outstanding accomplishment and a reflection of the dedication and talent of our students, parents, and staff. Our Vision We want to be a collaborative, interdependent school district, focused on student learning to meet the mission of the Jefferson School District. We envision a district in which staff: · Demonstrate an unwavering commitment to developing the whole child. · Seek and implement research-based strategies for improving student learning on a continual basis. · Monitor each student...

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Chief Business Officer

Jefferson School District

Details

Posted: 04-Feb-22

Location: Tracy, California

Type: Full Time

Required Education: 4 Year Degree

Salary: $127,431 - $143,430 + BONUS

Categories:

Manager, Supervisor Level

Salary Details:

$5000 Hiring Bonus and $5000 Retention Bonus at 18 months

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