Information Sheet – 3/12/19 - Board of Trustees Meeting

TO: Board of Trustees Item: 7.5

FROM: Celli Coeville

DATE: March 7, 2019

RE: Citizens' Oversight Committee Membership

Background

A Citizens' Oversight Committee (COC) was established on March 8, 2011 upon certification of successful election results of a Proposition 39 bond in November, 2010. The purpose of the committee is to review the Bond Audit and the expenditures of the bond proceeds.

Five vacancies exist - Members Terry Thomas and Kelly DeLong reached the maximum term limits. Members currently include Grace Merritt and Brandi Marotta.

Recommendation: Approve the applications for Citizens' Oversight Committee Membership

Jefferson School District Citizens Oversight Committee – Measure J
Application for Appointment

Overview of the Citizens Oversight Committee

In June 2006, the voters of the State of California authorized an amendment to the California Constitution (Proposition 39) lowering the voter approval requirement from two-thirds to fifty-five percent for school districts that:

1) Provide voters a specific list of projects
2) Appoint a committee of citizens to oversee the expenditure of funds and an annual performance audit and financial audit of the bond funds and bond projects.

Proposition 39 provides that the Citizens Oversight shall have at least seven members who shall serve up to two terms of two years each. Initially, three members will be appointed to one-year terms and four members will be appointed two-year terms. All appointees, regardless of the original term of appointment, are limited to a second term not to exceed two years.

Purpose

Because the district elected to pursue a bond election under the provisions of Proposition 39, State law requires the district establish a Citizens Oversight Committee appointed by the district's Governing Board. The committee purposes are:

- To actively monitor all projects and expenditures approved by the voters.
- To provide proper oversight and accountability to ensure that Measure J funds are used as they were intended.
- To report to members of the community on the progress of Measure J projects.

Duties

Duties of the committee will include:

- Ensure bond funds are spent only on projects listed in the bond project list and that no funds are used for salaries or general operating expenses.
- Monitor progress of bond projects.
- Receive and review copies of the annual performance and financial audits of bond projects as required by California State law (Proposition 39).
- Provide information to the public on the progress of bond projects and expenditures of bond funds.

Committee Membership Designation

State law requires that representatives of designated special interest organizations, if any, fill certain positions on the Citizens' Oversight Committee. Please indicate the committee designation(s) for which you are qualified:

☐ Active Member of a Business Organization - Company Name _____
(E.g. Chamber of Commerce)

☐ Active Member of Senior Citizen Group - Group Name _____

☐ Active Member of Taxpayer Organization - Organization Name _____

☐ At-Large Member of the Public

☑ Parent with Child(ren) Currently Enrolled in District

☑ Active Parent Member of a District Support Organization - Org. Name Monticello Jefferson PFA
(E.g. School Site Council, PFA, etc.)

☐ Active Farming/Agricultural Representative - Company Name _____

General Information

Applicant Name Sandy Ruiz

Home Address 31069 S. Bird Road Tracy, CA 95304

Home Telephone # 209-481-4439 E-mail alnsandyruiz@icloud.com

Employment Information

Name of Applicant's Employer _____

Work Address _____

Work Telephone # _____ E-mail _____

Educational Background *(Response Optional)*

(E.g. college and/or university, degree/major, vocational and/or other training, certificates, technical training, etc.)

B.S. Business Administration, Concentration in Accounting

Minors in Computer Information Systems and Sociology

Additional Information

Are you now or have you ever been employed by the district? ☐Yes ☑No

If yes, please explain

Describe your community service background including participation and membership in local civic organizations. *(You may attach an additional page or resume.)*

I volunteer annually (for about the past 10 years) with Tracy's Brighter Christmas program taking applications and delivering gifts.

Also as a family, we volunteer annually with Tracy's Senior Thanksgiving Dinner organized by the Tracy Sunrise Rotary.

The majority of my volunteering time has been as Treasurer and Auditor on the board of the MJPFA since 2012.

Describe your professional skills and training in finance, facilities, and/or construction or other relevant experience, including participation in professional organizations. *(You may attach an additional page or resume.)*

My education and experience in public and private accounting before I had a family, allowed me to support the MJPFA as Treasurer and Auditor, making sure that the board uses the funds raised to enhance the education of the students and to use the funds appropriately while adhering to the budget. I was also a Financial Planning Assistant before my kids started school.

Please Answer The Following Questions

1. How long have you been a resident within the boundaries of the district? 14 years 9 months

2. Have you or your children ever attended district schools? ☑Yes ☐No

   Comments I have three children and all currently attend school in the Jefferson School District.

3. Do you have or have you had any other relatives or close friends who have attended District schools? ☑Yes ☐No

   Comments Yes, my children are the third generation of Ruiz kids who have attended Jefferson School District.

4. Do you know of any reason, such as a potential conflict of interest (real estate, business, litigation, etc.) which would adversely affect your ability to impartially serve on the Citizens Oversight Committee? ☐ Yes ☑ No

   Comments _____

5. Explain why you would like to be appointed to this committee.

   I would like to work alongside the Superintendent, principals, and other members of this committee to ensure the correct expenditure of funds for projects that are in the best interest of our students and our schools I have high ethical values, am an involved parent and will help to make sure that funds are spent appropriately.

Certification of Applicant

I certify that answers and statements in this document are true and complete to the best of my knowledge and belief.

Signature _____ Date 03/08/2019

Completed applications must be received by the Superintendent, Jefferson School District, 1219 Whispering Wind Drive, Tracy, CA 95377, or faxed to 209-836-2930 as soon as possible.

For more information or if you have any questions, please contact Superintendent's Office at the district at 209-836-3388.