Sacramento City Unified School District | Putting Children First

BOARD OF EDUCATION MEETING
Special Board Meeting

Board of Education Members
Tara Jeane, President (Trustee Area 1)
Taylor Kayatta, Vice President (Trustee Area 6)
April Ybarra, Second Vice President (Trustee Area 4)
Jasjit Singh (Trustee Area 2)
Jose Navarro (Trustee Area 3)
Chinua Rhodes (Trustee Area 5)
Michael Benjamin (Trustee Area 7)
Owen Naqica, Student Board Member

Thursday, November 12, 2026
5:00 p.m. Closed Session
6:30 p.m. Open Session

Serna Center
Community Rooms
Washington Room (2nd Floor)
5735 47th Avenue
Sacramento, CA 95824

AGENDA

2026/27-13

Allotted Time

5:00 p.m. ***1.0 OPEN SESSION / CALL TO ORDER / ROLL CALL***

2.0 ANNOUNCEMENT AND PUBLIC COMMENT REGARDING ITEMS TO BE DISCUSSED IN CLOSED SESSION

5:15 p.m. ***3.0 CLOSED SESSION***

While the Brown Act creates broad public access rights to the meetings of the Board of Education, it also recognizes the legitimate need to conduct some of its meetings outside of the public eye. Closed session meetings are specifically defined and limited in scope. They primarily involve personnel issues, pending litigation, labor negotiations, and real property matters.

3.1 Government Code 54956.9 - Conference with Legal Counsel:
a) Significant exposure to litigation pursuant to subdivision (d)(2) of Government Code section 54956.9 (Two Potential Cases)
b) Initiation of litigation pursuant to subdivision (d)(4) of Government Code section 54956.9 (One Potential Case)

3.2 Government Code 54957.6 (a) and (b) Negotiations/Collective Bargaining SCTA SEIU, TCS, Teamsters, UPE, Non-Represented/Confidential Management (Dan Schallock)

3.3 Government Code 54957—Public Employee Performance Evaluation Title: Superintendent

6:30 p.m. ***4.0 CALL BACK TO ORDER***

5.0 ACTION ITEMS

6:32 p.m. *5.1 Approval of Budget Review Committee (BRC) Appointments (Gerardo Castillo)* ***Action***
10 minute presentation
20 minute discussion

7:02 p.m. ***6.0 ADJOURNMENT***

NOTE: The Sacramento City Unified School District encourages those with disabilities to participate fully in the public meeting process. If you need a disability-related modification or accommodation, including auxiliary aids or services, to participate in the public meeting, please contact the Board of Education Office at (916) 643-9314 at least 48 hours before the scheduled Board of Education meeting so that we may make every reasonable effort to accommodate you. [Government Code § 54953.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. §12132)] Any public records distributed to the Board of Education relating to an open session item will be available for public inspection at the Serna Center, at 5735 47th Avenue, Sacramento, during normal business hours or on the District's website at www.scusd.edu.

SACRAMENTO CITY UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION

Agenda Item# 5.1

Meeting Date: November 12, 2026

Subject: Approval of Budget Review Committee (BRC) Appointments

- ☐ Information Item Only
- ☐ Approval on Consent Agenda
- ☐ Conference (for discussion only)
- ☐ Conference/First Reading (Action Anticipated: _____)
- ☒ Conference/Action
- ☐ Action
- ☐ Public Hearing

Division: Business Services

Recommendation: Approve the appointment of the recommended Budget Review Committee members to support the District's 2026-27 budget submission to the California Department of Education (CDE).

Background/Rationale: Following the Sacramento County Office of Education's (SCOE) disapproval of the District's 2026-27 budget, California Education Code Section 42127.1. requires the establishment of a Budget Review Committee (BRC) to review the District's fiscal condition and proposed budget. The Board of Education received a list of nine candidates from the California Department of Education (CDE). The Board will recommend appointing three individuals to serve on the committee. The BRC will review the District's 2026-27 budget and fiscal recovery plan and will submit a recommendation regarding budget approval or proposed corrective actions to support the District's ability to meet its financial obligations to CDE.

Financial Considerations: There is no additional fiscal impact associated with the establishment of the Budget Review Committee. Financial implications of corrective actions and any future proposals will be identified separately.

LCAP Goal(s): Goal 1 – Graduation Outcomes; Goal 2 – Academic Outcomes; Goal 3 – Welcoming and Safety Outcomes

Documents Attached:
Letter and BRC potential list of members

Estimated Time of Presentation: 10 Minutes
Submitted by: Gerardo Castillo, CPA, Chief Business Officer
Approved by: Cancy McArn, Superintendent

CALIFORNIA DEPARTMENT OF EDUCATION

TONY THURMOND
STATE SUPERINTENDENT OF PUBLIC INSTRUCTION

1430 N STREET, SACRAMENTO, CA 95814-5901 • 916-319-0800 • WWW.CDE.CA.GOV

November 9, 2026

Tara Jeane, Board President
Sacramento City Unified School District
5735 47th Avenue
Sacramento, CA 95824

Dear Board President Jeane:

Subject: Disapproval of the Sacramento City Unified School District 2026–27 Budget

This letter is in response to a notification sent by the Sacramento County Superintendent of Schools indicating their disapproval of the Sacramento City Unified School District (SCUSD) 2026–27 budget and subsequently calling for the formation of a State Budget Review Committee (Committee). In accordance with California *Education Code* (*EC*) Section 42127.1, the California Department of Education (CDE) is providing the SCUSD with a list of potential Committee members who expressed an interest and willingness to serve on this Committee.

EC Section 42127.2 specifies that the SCUSD must select three people to review the SCUSD 2026–27 proposed budget within five working days after receiving the list of candidates. A resume for each of the candidates is enclosed. If the SCUSD does not select a committee within the five working days, the State Superintendent of Public Instruction (SSPI) shall select and convene a committee within ten working days after the SCUSD receives the list of candidates.

The Committee members will review the proposed budget and either:

1) Recommend approval of the SCUSD 2026–27 budget; or

2) disapprove the 2026–27 SCUSD budget and recommend revisions that would enable the SCUSD to meet its financial obligations in the current fiscal year and with regard to its multi-year financial commitments.

If the Committee recommends approval, the county superintendent will approve the budget. If the Committee recommends disapproval, the district, within five working days, may submit a response to the SSPI, including revisions to the budget and any other proposed actions to be taken as a result of the recommendation of the Committee.

Based on the recommendations of the Committee and any response provided by the district's governing board, the SSPI will either approve or disapprove the budget. If the

SSPI disapproves the district's budget, the county superintendent of schools shall develop and adopt, in consultation with the SSPI and the district's governing board, a fiscal plan and budget which will allow the district to meet its financial obligations, both in the current fiscal year and with regard to its multiyear financial commitments. The governing board shall govern the operation of the district for the current fiscal year in accordance with that adopted budget.

Please notify the CDE as soon as the selections are made, but no later than November 16, 2026, by contacting David Lawrence, Fiscal Consultant, School Fiscal Services Division, by email at dlawrence@cde.ca.gov. If you have any questions, please do not hesitate to contact David Lawrence or Blanche Katayama, Administrator, School Fiscal Services Division, at bkatayama@cde.ca.gov.

Sincerely,

Abel Guillén

Abel Guillén, Deputy Superintendent
Operations and Administrative Branch

AG:dl
Attachment

cc: Tony Thurmond, State Superintendent of Public Instruction
Members of the Board, Sacramento City Unified School District
Jaqueline White, County Superintendent of Schools, Sacramento County Office of Education
Tami Pierson, Director, School Fiscal Services Division
Megan K. Reilly, Chief Executive Officer, Fiscal Crisis and Management Assistance Team
Cancy McArn, Superintendent, Sacramento City Unified School District
Nick Schweizer, Associate Superintendent, Business Services, Sacramento County Office of Education
Gerard Castillo, Chief Business Officer, Sacramento City Unified School District

List of potential BRC members for Sacramento City USD, November 9, 2026

Francie Heim
Retired CBO COE and district level experience
18 years CBO training instructor in FCMAT CBO Mentor Program

Status: Contacted, willing to be considered, resume sent.

Jim Novak
Retired CBO and CPA COE and district level experience at districts of varying sizes
Doing coaching work for FCMAT

Status: Contacted, willing to be considered, resume sent.

Michael Bishop
Retired CBO, business background, large and urban school experience
Doing coaching work for FCMAT and faculty at USC Certificate program

Status: Contacted, willing to be considered

Peter Foggiato
Current Associate Superintendent/ CBO San Juaquin COE, CPA, member of the K-12 Audit Working Group and former Director School Fiscal Services, CDE

Status: Contacted, willing to be considered

Robert Shemwell
Retired CBO, currently resides in Hawaii
Doing coaching work for FCMAT and has fiscal expert/ advisor experience

Status: Contacted, willing to be considered, resume sent

Roslynne Manansala-Smith, CFE
Current FCMAT intervention specialist; formerly director external services at El Dorado COE
530-919-4931

Status: Contacted, willing to be considered; would be part of FCMAT assignment

Scott Price
Current Associate Superintendent/ CBO Riverside COE, former Superintendent Lennox School District and CFO in Los Angeles USD.

Status: Contacted, willing to be considered, resume sent

Tami Montero, CFE
Current FCMAT Chief Analyst; formerly assistant superintendent / CBO at COE and District Leads FCMAT professional development programs, SACs expertise and faculty in the USC Certificate program

Status: Contacted, willing to be considered; would be part of FCMAT assignment

Pamela Lauzon
Currently works as a self-employed business services consultant for school districts in Riverside County. Former Director of Business Services and Assistant Superintendent, Business Services for the Jurupa Unified School District. Served as an Interim Chief Business Officer on two separate occasions for a total of 3 years.

Status: Contacted, willing to be considered, resume sent

Francie Heim

RESUME

[redacted]

School Business Solutions (Owner)
January 2008 to Present

CBO Training/ Instructor: 18 years training CBOs in the FCMAT CBO Mentor Program, a joint partnership with Fiscal Crisis Management Assistance Team (FCMAT), CA Association of School Business Officials (CASBO), CA County Superintendents Educational Services Association (CCSESA), and School Services of CA (SSC). CASBO instructor and consultant, training future CBOs.

Consultant with CSI/ Bill McGuire and Associates as a member of the Fiscal Expert Team for Santa Clara COE/ Alum Rock School District, Los Angeles COE/ LA Unified, Inglewood Unified, Montebello Unified, San Gabriel Valley ROP, Calaveras COE/ Calaveras Unified.

Consultant with El Dorado County Office of Education (EDCOE), specifically supporting the special education and SELPA Local Plan and the Charter SELPA.

Consultant with Vicki Barber and Associates. Partnered on multiple special education reviews. Provided training in special education finance.

Charter School Oversight: Sacramento County Office of Education/ Fortune Charter School (2011 to 2019). Twin Rivers Unified/ Gateway Charter Schools, Highlands, Heritage (2018 to 2020).

LAST POSITION: DEPUTY SUPERINTENDENT
ADMINISTRATIVE SERVICES
El Dorado County Office of Education
January 1, 1995 - December 2008

Responsible for the provision of administrative support and leadership to the El Dorado County Office of Education administrative services departments, charter schools, and 16

school districts in areas relating to school finance, accounting and auditing, budget development and review, financial accounting and reporting, purchasing, collective bargaining, charter schools, special education funding, facilities and operations, and technology information services. County Office General Fund Budget = $50 million.

Part of the leadership team that established the El Dorado County Charter SELPA and continued to support the Charter SELPA as a consultant for several years after leaving the employment of EDCOE.

Amador County Unified School District/ Amador County Office of Education

Position: ASSISTANT SUPERINTENDENT
Business Services and Operations
May 1987 - January 1995

Responsible for all phases of district and county office support operations, including business operations, technology, warehouse, maintenance and facilities, transportation, certificated and classified negotiations, risk management, food service.

El Dorado County Office of Education

Position: DIRECTOR OF BUSINESS SERVICES
November 1981 to May 1987

EDUCATION

California State University, Sacramento, California
Degree: Bachelor of Science, Business Administration
Successful completion of the CPA exam, not currently practicing/ licensed
Chief Business Official Certification (CASBO)

OTHER ACTIVITIES AND MEMBERSHIP

CA Association of School Business Officials
Recipient of 2020 CASBO Sky Joyner Award
El Dorado County Boys & Girls Club, Emeritus Board Member
CASA El Dorado, Board Member, Treasurer
El Dorado Women's Fund, Board Member, Treasurer
El Dorado Community Foundation, Board Member, Finance Committee Chair
El Dorado Community Health Center, Board Member

JAMES NOVAK, Ed.D.



PROFESSIONAL SUMMARY

Retired Chief Business and Financial Officer with more than two decades of cabinet-level experience in public education and more than 11 years of corporate business experience. Extensive experience managing school district finances across diverse fiscal, demographic, and organizational environments, including high-wealth basic-aid districts, high-poverty districts, large urban districts, suburban districts, and a county office of education.

Experienced in evaluating school district financial conditions, identifying fiscal risks, developing and assessing options for fiscal stabilization, and communicating the financial implications and trade-offs of alternative courses of action. Committed to transparent financial analysis, constructive collaboration, and helping governing boards and stakeholders understand the financial realities and long-term implications of their decisions.

PROFESSIONAL EXPERIENCE

SCHOOL BUSINESS CONSULTING

Consultant | August 2020–Present

- Serve as a coach for new Chief Business Officers through FCMAT's CBO Coaching and Induction Program.
- Provide consulting support to school districts on budgeting, fiscal analysis, and fiscal stabilization planning.

SANTA CLARA COUNTY OFFICE OF EDUCATION

Chief Business Officer | July 2019–August 2020 | San Jose, CA

County Profile: 263,000 students; 34.9% low-income; 21.7% English learners; 43.2% unduplicated.

- Strengthened collaboration among the county's 31 district Chief Business Officers, helping them navigate the financial and operational challenges associated with the COVID-19 pandemic.
- Reviewed the budgets and multi-year forecasts of all 31 districts and provided budget approvals and interim certifications or qualifications. Worked closely with the CBOs of districts receiving qualified interim reports.
- Implemented internal systems within DBAS to improve interim and budget reporting to school districts.
- Led the rapid transition of the Business Services team to remote operations, maintaining nearly all productivity.

PALO ALTO UNIFIED SCHOOL DISTRICT

Chief Business Officer | September 2018–June 2019 | Palo Alto, CA

District Profile: 12,000 students; $265 million General Fund budget; 11.1% low-income; 10.6% English learners; 18.2% unduplicated.

- Managed a General Fund budget of approximately $265 million in a high-wealth basic-aid district serving approximately 12,000 students.
- Worked with the district's financial advisor to issue $20 million in Tax and Revenue Anticipation Notes (TRANs) to address seasonal cash-flow needs.
- Worked with the Cabinet and Board of Education to contain costs, eliminate a structural deficit, and develop a positively certified budget.

DESERT SANDS UNIFIED SCHOOL DISTRICT

Assistant Superintendent, Business Services | July 2014–August 2018 | La Quinta, CA

District Profile: 29,000 students; $344 million General Fund budget; 63.0% low-income; 24.3% English learners; 72.2% unduplicated.

- Managed a General Fund budget of approximately $344 million in a district serving approximately 29,000 students.
- Led implementation of operational and service-delivery initiatives, including the IMPACT maintenance trailer team and elementary school salad bars.
- Restructured the Maintenance, Operations and Transportation Department and the Technology Department.
- Developed long-term plans for funds for textbooks, professional development, technology, teacher induction, and deferred maintenance, supporting long-term planning for district needs.

LONG BEACH UNIFIED SCHOOL DISTRICT

Chief Business and Financial Officer | July 2011–July 2014 | Long Beach, CA

District Profile: 83,700 students; $700 million General Fund budget; 67.9% low-income; 23.8% English learners; 69.3% unduplicated.

- Managed a General Fund budget of approximately $700 million in a large urban district serving approximately 83,700 students.
- Directed the pilot of a student-based budgeting model informed by initiatives at other large urban school districts nationwide.
- Played a key role in developing systems to implement the Local Control Funding Formula (LCFF) and the Local Control and Accountability Plan (LCAP).
- Worked with employee bargaining groups to establish health benefits committees focused on providing quality employee benefits at reasonable rates.

PALM SPRINGS UNIFIED SCHOOL DISTRICT

Assistant Superintendent, Business Services | July 2004–July 2011 | Palm Springs, CA

District Profile: 24,000 students; $200 million General Fund budget; 82.1% low-income; 32.3% English learners; 88.2% unduplicated.

- Managed a General Fund budget of approximately $200 million in a district serving approximately 24,000 students.
- Played a key role in the passage of two bond measures totaling $638 million over four years to fund new school construction, modernization of existing schools, and land acquisition for future schools, and served as district chair of the Citizens' Oversight Committee.
- Led the process of implementing necessary budgetary cuts during a severe economic downturn, while avoiding employee layoffs.

SOUTH SAN FRANCISCO UNIFIED SCHOOL DISTRICT

Assistant Superintendent, Business Services | September 2001–July 2004 | South San Francisco, CA

District Profile: 9,700 students; $60 million General Fund budget; 34.4% low-income; 24.5% English learners; 47.7% unduplicated.

- Managed a General Fund budget of approximately $60 million in a district serving nearly 10,000 students.
- Worked with Assemblymember Gene Mullin on legislation (AB 264) permitting the district to use Special Reserve Funds for General Fund purposes on a one-time basis.
- Facilitated the Bond Oversight Committee, comprising community representatives charged with oversight of the district's $68 million modernization program.

CHELSEA SCHOOL DISTRICT

Executive Director of Business and Operations | August 1997–August 2001 | Chelsea, MI

District Profile: 3,000 students; $25 million General Fund budget.

- Managed a General Fund budget of approximately $25 million in a district serving nearly 3,000 students.
- Led the conversion to a new accounting information system.
- Served on the school board's negotiating teams for the teachers' and bus drivers' union contract, using Mutual Gains Bargaining for the teachers' contract, and more traditional approaches for the bus drivers' contract.

OTHER BUSINESS EXPERIENCE

- **Bing Group / Superb Manufacturing** — Director of Administration
- **Superior Consultant Company** — Controller
- **Omega Healthcare Investors, Inc.** — Controller
- **Plante & Moran CPAs** — Audit Associate

EDUCATION AND CREDENTIALS

WALDEN UNIVERSITY | Minneapolis, MN
Doctor of Education (Ed.D.), Educational Administration and Leadership | April 2012

CENTRAL MICHIGAN UNIVERSITY | Mount Pleasant, MI
Master of Arts, General Education Administration | May 2000

WAYNE STATE UNIVERSITY | Detroit, MI
Bachelor of Arts, Business Administration (Accounting) | August 1986

CERTIFIED PUBLIC ACCOUNTANT LICENSE | State of Michigan
Issued June 1988 (currently inactive).
Passed the Uniform CPA Examination on first attempt, November 1986.

PROFESSIONAL LEADERSHIP AND ACCOMPLISHMENTS

- **California Association of School Business Officials (CASBO)** — Member, 2004–Present
- **CASBO Legislative Committee** — Member, 2014–2018; Chair, 2016–2017
- **Association of California School Administrators (ACSA)** — Member, 2014–Present
- **Southern California School Business Executives** — President, 2014–2015
- **Education Mandated Cost Network, Executive Committee** — Member, 2012-2013; Chair, 2014–2020
- **Riverside County Legislative Advisory Committee** — Member, 2014–2018
- **California Delinquent Tax Finance Authority** — Vice President, 2011–2014; consortium of Los Angeles County school districts organized to maximize collections on delinquent property taxes
- **California State University, Long Beach** — Guest presenter in the Master of Education program
- **California School Boards Association (CSBA) Annual Meeting** — Presenter, “Building a Better Budget for Student Success” and “Budget Trimming 101: Have You Considered This?”
- **School Services of California, Inc.** — Advisory committee member for the 2010 edition of *Doing More With Less*
- **Palm Springs Unified School District** — Classified Administrator of the Year, 2008–2009

MICHAEL P BISHOP, Sr

SUMMARY

Experienced executive level retired K-12 public school administrator with a demonstrated 43-year history working in K-12 school business consulting industry. Skilled in K-12 district operations and management, coaching and analytical analyses. Strong entrepreneurial professional with a Bachelor of Science in Business Administration, emphasis in Accounting and Organizational Behavior from the University of Southern California – Marshall School of Business.

SCHOOL BUSINESS CAREER

For 29 years, I worked in positions of increasing responsibility:

Santa Ana USD – December 2009 to December 2012
Deputy Superintendent & CBO
Executive responsible for the divisions of Business; Facilities & M&O, Human Resources and Public Safety.

Paramount USD – March 2000 to December 2009
Assistant Superintendent & CBO
Executive responsible for the Business Division and Public Safety.

Compton USD – December 1995 to March 2000
Associate Superintendent & CBO
Executive responsible for the Business Division and Public Safety.

Vicenti, Lloyd & Stutzman LLP (now CLA) – October 1993 to December 1995
Sr. Business Consultant
Assisted in managing general business services consulting for K-14 districts and tax planning and preparation.

Los Angeles County Office of Education – August 1983 to August 1993
General Accounting Officer – Key member of a team that was responsible for the countywide financial system used by all LEAs in LA County and assisting with financial transactions and financial books and records.
Chief Accountant – Led a team to oversee the financial and payroll activities of all LACOE departments and coordinate with the budget department.
Principal Internal Auditor – Led a team to perform financial and operational audits of LACOE departments and coordinate with external auditors for the annual single audit.

[redacted]

ACTIVITIES IN RETIREMENT

After retirement in 2012, my involvement with K-12 school districts continued in a variety of ways:

K-12 School District Consulting – January 2013 – present
- Business services consulting to Superintendent and Cabinet and/or CBO Coach – 18 Districts
- District strategic planning meeting facilitation – 1 District
- District health benefits limited review – 1 District
- District Superintendent search – 1 District
- JPA CEO search – 3 District members

Captive Insurance for Public Agencies – October 2013 to current
Contract Director Property & Construction Risk
Led business development and member services for OCIP program which provided all related construction insurance, risk management and loss control activities.

Fiscal Crisis Management Assistance Team – July 2023 to present
Contract Coach, Coaching and Induction Program
Serve as a coach for a first to third year K-12 District CBO for this 12-month program.

USC Rossier School of Education – September 2013 to present
USC SBMCP Adjunct Professor
Serve on a faculty team the facilities the instruction for a 12-month school business preparation program.

Long Beach Unified School District – September 2019 to September 2025
Bond Citizen Oversight Committee Member (BCOC)
The BCOC is made up of seven individuals appointed by the Board of Education. As an independent committee, it is charged with informing the public about Measures K & E projects and expenditures and developing an annual report to the Board of Education.

GOVERNANCE EXPERIENCE

PlaceWorks – December 2024 to present
Outside Board Member for private employee-owned corporation
WLCAC – March 2006 to March 2024
Outside Board Member for private non-profit corporation
College Bound CA – December 2013 to December 2018
Outside Board Member for private non-profit corporation
Los Feliz Charter School for the Arts – March 2006 to March 2013
Board Member for charter school

[redacted]

Summary

Skilled education finance executive with more than 25 years of experience in K–12 school finance, fiscal oversight, auditing, and governmental accounting. Experienced in leading complex organizations, advising state and local educational agency leaders, implementing major fiscal initiatives, and helping educational agencies navigate regulatory and financial change.

Professional Experience

San Joaquin County Office of Education **August 2017-present**

- *Assistant Superintendent, Business Services*……. May 2023-present
- *Division Director, District Business Services……August 2017-May 2023*

Provide strategic leadership for the Business Services departments of the county office of education and serve as a member of the county Superintendent's cabinet. Contribute to the development and administration of the county office's $500 million budget; carry out the county Superintendent's responsibilities related to fiscal oversight and support of school districts; oversee operational departments that support facilities construction and maintenance, contracts, purchasing, risk management, and information technology; and lead Joint Power Authorities for countywide data processing and insurance groups.

Key accomplishments include the following:

- Commenced dozens of facility construction and modernization projects
- Supported staff through the implementation of new technologies to secure our computer network infrastructure.
- Guided local educational agencies (LEA) through economic uncertainties and the implementation of numerous new laws and programs
- Modified processes to successfully maintain uninterrupted service during pandemic shutdowns and built off these changes to improve efficiencies post-pandemic.
- Revisited, updated, and improved department processes and adjusted and realigned staff to better serve our internal and external customers.

California Department of Education **March 2006-August 2017**

- *Director, School Fiscal Services Division*……February 2013-August 2017
- *Education Fiscal Services Administrator*……October 2007-January 2013
- *Education Fiscal Services Consultant*…….March 2006- October 2007

Directed the operations of the School Fiscal Services Division with its 60 multidisciplinary staff and served as an advisor to the State Superintendent of Public Instruction on school finance matters. This included providing professional direction and guidance to five administrators and their staff in the development and management of systems and processes needed to apportion $50 billion annually and to collect financial data; in the development and maintenance of fiscal policies, such as the California School Accounting Manual; in the formation or analysis of legislation including the State budget; and in the resolution of audit findings. This also included working collaboratively with county offices of education and other organizations to ensure fiscal accountability and solvency of all school districts and county offices of education and working closely with appointed State Administrators to restore insolvent school districts to fiscal health.

Key accomplishments include the following:

- Contributed to the architecture of the Local Control Funding Formula and successfully carried out the state-level implementation under tight timeframes
- Implemented a process for reviewing Local Control and Accountability Plans of 58 county offices of education and 7 school districts
- Revised accounting rules to implement new standards and the new federal uniform grant requirements
- Successfully supported the South Monterey County Joint Union High School District's return to fiscal solvency and local control

California State Auditor's Office **June 1999-March 2006**

- *Senior Auditor Evaluator*……December 2001- March 2006
- *Auditor Evaluator II* ……January 2001-November 2001
- *Auditor Evaluator I* ……June 1999-December 2000

Working in the State's independent audit office, planned, led, and conducted audits of state and local government programs following audit standards. This included training and supervising auditors; developing audit procedures and overseeing fieldwork; coordinating workflow of contracted consultants and legal counsel; and writing comprehensive audit reports to the Governor, the Legislature, and the public that provided recommendations for improvement. Projects included the audit of the State's comprehensive annual financial report, Federal compliance audits, and performance audits requested by the Joint Legislative Audit Committee.

Key accomplishments include the following

- Served as an essential contributor to the State's implementation of full-accrual accounting under GASB Statement 34

- Identified issues in audits that resulted in improved state government, such as changes to the state's car rental practices, changes to laws that protect the safety of foster children, and the support of the K12 High Speed Network.

Other Experience

San Joaquin County Treasury Oversight Committee: Member	**2023-Present**
Business and Administration Services Committee, California County Superintendents: State Audit Guide Committee representative, Common Message lead, Chair Elect	**2023-Present**
External Services Subcommittee of the Business and Administration Services Committee, California County Superintendents: Co-Chair	**2008 to 2013 and 2020**
Association of Educational Federal Finance Administrators: Board Member, President, Vice President, Secretary	**2015-Present**

Education/Certifications

UNIVERSITY OF SAN FRANCISCO
Master of Public Administration

CALIFORNIA STATE UNIVERSITY, STANISLAUS
B.S. in Business Administration, Accounting Concentration

FCMAT CBO MENTOR PROGRAM
Certificate of Completion

CASBO Chief Business Official, Certificate number 1110

CERTIFIED PUBLIC ACCOUNTANT, California, Certificate number 91814



ROBERT L. SHEMWELL

PROFILE

Experienced Deputy Superintendent with a demonstrated history of working in the education management industry. Skilled in Budgeting, Coaching, Program Evaluation, Educational Consulting, Educational Technology and Insurance JPA Management. Strong operations professional with a Master's degree focused in education from California State University Bakersfield.

EXPERIENCE

DEPUTY SUPERINTENDENT BUSINESS SERVICES

YUBA CITY UNIFIED SCHOOL DISTRICT, YUBA CITY, CALIFORNIA

2014 to 2022 (Retired)

Administrative Head of Fiscal Services, Food Services, Transportation, Maintenance and Facilities, Technology, Chief Labor Negotiator: Plan Organize and Manage Budget of $250 million

ASSISTANT SUPERINTENDENT BUSINESS SERVICES

SANTA CRUZ CITY SCHOOL DISTRICT, SANTA CRUZ, CALIFORNIA

2013-2014

Administrative Head of Fiscal Services, Food Services, Technology Services, Maintenance and Facilities: Plan, Organize and Manage Budget of $70 million

CHIEF BUSINESS OFFICER

DIRECTOR OF CATEGORICAL PROGRAMS

ALEMEDA UNIFIED SCHOOL DISTRICT, ALAMEDA, CALIFORNIA

2009-2013

Administrative Head of Fiscal Services, Food Services, Technology Services, Maintenance and Facilities, Human Resources, Instructional Services: Plan, Organize and Manage Budget of $100 million

DIRECTOR OF INSTRUCTIONAL SERVICES

SHASTA COUNTY OFFICE OF EDUCATION, REDDING, CALIFORNIA

2007-2009

Director in charge of: AB75 Principal Training Program, Categorical Program Co-Operative, Student Programs and Services, Assessment and Accountability, State Testing, Charter School

Administration, Independent Study Administration, Home School Administration, Alternative Education, Education Technology

DIRECTOR OF CALIFORNIA TECHNOLOGY ASSISTANCE PROJECT (REGION 5)

SANTA CLARA COUNTY OFFICE OF EDUCATION, SAN JOSE, CALIFORNIA

2005-2007

Regional Program Director (Santa Clara, Monterey, San Benito, Santa Cruz Counties) State Funded Educational Technology Consortium: $5.5 million annual regional grant program budget

DIRECTOR OF INSTRUCTIONAL AND INFORMATIONAL TECHNOLOGY

SALINAS UNIFIED SCHOOL DISTRICT, SALINAS, CALIFORNIA

2000-2005

Administrative Head of Information Systems, Information Services Department, District Technology Infrastructure, District Technology Planning, Technology Staff Development, Technology Grants

PROFFESIONAL DEVELOPMENT COORDINATOR

SAN FRANCISCO UNIFIED SCHOOL DISTRICT, SAN FRANCISCO, CALIFORNIA

1997-2000

Administrative Coordinator Curriculum and Technology, Staff Development, Computer Education Department Chair, Curriculum Technology Lab Manager, Technology Integration Specialist, Technology Resource Teacher Trainer

TEACHER, TECHNOLOGY COORDINATOR, ADMINISTRATIVE INTERN

LOS ANGELES COUNTY OFFICE OF EDUCATION, LOS ANGELES, CALIFORNIA

1991-2007

Teacher middle and high school: Social Studies, Language Arts, Computer Technology, Career Education

EDUCATION

2009

UNIVERSITY OF SOUTHERN CALIFORNIA

ROSSIER SCHOOL OF EDUCATION, LOS ANGELES, CALIFORNIA

School Business Management Certificate Program

2001

SAN JOSE STATE UNIVERSITY

SCHOOL OF EDUCATION, SAN JOSE, CALIFORNIA

Educational Administration Credential Program

1995

CALIFORNIA STATE UNIVERSITY BAKERSFIELD

SCHOOL OF EDUCATION, BAKERSFIELD, CALIFORNIA

Masters in Education-Curriculum and Instruction

1990

EASTERN MICHIGAN UNIVERSITY

SCHOOL OF EDUCATION, YPSILANTI, MICHIGAN

Bachelor of Arts- Education

Majors: History and English Language and Literature

BOARD MANAGEMENT POSITIONS

NORTHERN CALIFORNIA RELIEF: Insurance Joint Powers Authority, Executive Board Member, Claims and Coverage Committee Member

NORTH VALLEY SCHOOLS INSURANCE GROUP: Workers Compensation Insurance Joint Powers Authority, Executive Board Secretary

EAST BAY SCHOOLS INSURANCE GROUP: Insurance Joint Powers Authority, Board Member

MONTEREY BAY SCHOOLS INSURANCE GROUP: Insurance Joint Powers Authority, Executive Board President

SUTTER COUNTY, COUNTY-WIDE OVERSIGHT BOARD: County Redevelopment Board, Board Member

SANTA CRUZ COUNTY, COUNTY-WIDE OVERSIGHT BOARD: County Redevelopment Board, Board Member

CREDENTIALS AND CERTIFICATIONS

CASBO CBOe Certificate-/USC Certificate School Business Management

Tier II Administrative Services (California)

Multiple Subject, Professional Clear (California)

Secondary Education Teaching Certificate (Michigan)

RMS
Roslynne
Manansala-Smith

ROSLYNNE MANANSALA-SMITH





EXPERIENCE

October 2023– Current
Intervention Specialist • Fiscal Crisis & Management Assistance Team (FCMAT) • Bakersfield, CA

July 2015– October 2023
Director, External Business • El Dorado County Office of Education (EDCOE) • Placerville, CA
Supervise & lead External Business Department to support 16 LEAs in the following: Fiscal Oversight (AB 1200); LCAP Approval; Differentiated Technical Assistance; AP & Payroll Production of Warrants; Cash management; CalSTRS & CalPERS retirement data reporting; Attendance data reporting to State (CDE); Fiscal Services (provide CFO & accounting direct services to districts, JPA); Provide/coordinate countywide trainings; Participate in statewide trainings with CCS; Lead monthly district CBO meetings; Coordinate quarterly user group meetings for Payroll, AP, CALPADS, & LCAP

August 2012– July 2015
Chief Fiscal Officer • Black Oak Mine Unified School District (BOMUSD) • Georgetown, CA
Cabinet level position at K-12 School District with an estimated total budget over $10m; Responsible to attend all Governing Board of Trustee meetings & present all aspects of Budget & Business items to Board & educational partners.
Manage & Coordinate District Business staff in the following areas: Budget development/management; Payroll, Accounts Receivable; Accounts Payable; CALPADS; Attendance; Enrollment Projections; Developer Fees, Fixed Assets; All State & Federal reporting; Audit requirements; School Nutrition Program; Facilities Program; Cash Flow; Liability & Risk Management; Schools Insurance Group board member representative; Negotiations.

March 2009– August 2012
Accountant, External & Internal Business • El Dorado County Office of Education • Placerville, CA
Prepared/monitored annual operating budget of $4m for Charter School Program (Rite of Passage) & $2.1m for Regional Occupational Program (CSROP JPA)
Provided support for 16 LEAs in the following: Fiscal Oversight (AB 1200); Fiscal Accounting Services; Preparation of various fiscal information & reports to support Director & Administrative decisions; Cash flow preparation; Revenue projections.

July 2005– March 2009
Accounting Technician & Fiscal Technician, Facilities • El Dorado Union High School District (EDUHSD) • Placerville, CA
Prepared/monitored budgets for capital project funds, including: cash flow management (average activity across all funds over $10m annually); State & Federal reporting, including SACS; coordination with Auditors; Prepare reporting to GO Bond Oversight Committee and District Board; Developer Fees; Purchasing; Implemented and managed Account-Ability software; Contract review.

RMS
Roslynne Manansala-Smith







EDUCATION

2000 California State University at Long Beach, Long Beach, CA
Bachelor of Arts Degree, Liberal Studies Major, Asian American Studies Concentration

2015 CASBO Chief Business Official Certification
Valid through June 30, 2028

2024 Certified Fraud Examiner

PROFESSIONAL DEVELOPMENT

2009 – CBO Mentor Project, Cohort 5 (Partnership of FCMAT, CCSESA, BASC, CASBO, SSC)

2005 to Current – Annually attend SSC Governor's Budget Workshops, CASBO Annual Conference, CASBO CBO Symposium, CCS Fall AB1200 & Spring CBO Conferences, Various CASBO, SSC & FCMAT Workshops, CDE SACS Forum, CCS LCAP workshops.

2018 – Continuous Improvement Trainings (Brandon Bennett, Carnegie)

2021 to 2023 – Organizational Excellence (Studer Education/Huron)

AWARDS

2022 – ACSA Region 2 Administrators of the Year, Central Office Administrator at EDCOE

2013 – ACSA Region 2 Award of Excellence for BOMUSD

2011 & 2012 – EDCOE's People Choice Award

2008 – EDUHSD District Office Classified Employee of the Year

REFERENCES

Available Upon Request

SCOTT S. PRICE, Ph.D.

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EDUCATION

2003 University of Southern California, Los Angeles, California -- Ph.D., Educational Policy and Administration
1991 University of California - Irvine, M.A. Spanish Literature; Irvine, California
1987 Brigham Young University, B.A., Spanish, Russian (minor); Provo, Utah

CREDENTIALS AND CERTIFICATIONS

1992 Single Subject Teaching Credential; Spanish; 1994 BCLAD, Spanish

AWARDS

1996 Bilingual Fellow – US Department of Education

EXPERIENCE

Associate Superintendent & Chief Business Official, 2021 - current
Riverside County Office of Education (23 districts, 430,000 students)

- Leading budget development, accounting and disbursements, payroll, financial and state reporting, capital finance, facilities, special education SELPA finance, state and national regulatory agency interaction, debt management, and internal controls
- Providing financial and LCAP oversight to 23 Riverside County school districts
- Advising the Superintendent and Board on financial, legal, and governmental matters; sharing expertise with constituent districts' leadership and staff.
- Consulting with district superintendents, CBOs, and administrators on financial procedures, analysis of laws, rules, and policies. Providing oversight with districts and boards when necessary
- Interacting with state officials and agencies regarding legislation, education code and regulatory changes in school finance

Superintendent of Schools, Lennox School District 2019-2021

- Served as the Chief Executive Officer for the Lennox School District providing leadership in instructional, financial, and human resources matters
- Worked collaboratively with the Board, constituents, district leaders, staff, personnel, and students to find learning solutions during the pandemic, and return students and staff back to classrooms in a safe environment
- Created and implemented a fiscal stabilization plan to restore Lennox to financial stability, served dual role as CBO for most of my tenure
- Organized a new district leadership team to focus on student achievement and maintain newly newfound fiscal stability

Chief Financial Officer, Los Angeles Unified School District 2017- 2019

- Served as the Chief Financial Officer for Los Angeles Unified School District managing budget development, accounting and disbursements, payroll, state reporting, capital finance, risk management, transportation, food services, debt management, internal control, unemployment, and LCAP development.
- Managed the $7.5 billion general fund annual budget, 465,000 students, over 1,000 schools
- Provided strategy for selling and utilizing all school construction bonds

Chief Financial Officer, Assistant Superintendent, Business Services 2014 -
Los Angeles County Office of Education (80 districts, 1.6 million students) 2017

- Served as the Chief Financial Officer for LACOE managing budget development, accounting and disbursements, payroll, financial and state reporting, capital finance, risk management, facilities, special education SELPA finance, interaction with state and national regulatory agencies, debt management, and internal controls
- Provided financial and LCAP oversight to the 80 school districts of Los Angeles County.
- Advised the Superintendent and Board on financial, legal, and governmental matters; provide expertise to leadership, staff, and internal and external stakeholders
- Reviewed and advised district administrators on financial procedures, analysis of laws, rules, and policies and the implications of changes in these
- Coordinated debt management and TRAN pool for constituent districts

Chief Business Officer, Assistant Superintendent, Business Services 2010 -
South Pasadena Unified School District (5 sites, 4,700 students) 2014

- Served as the Chief Business Officer managing budget development, accounting, payroll, disbursements, financial and state reporting, capital finance, debt management, risk management and facilities
- Brought fiscal stability to a district in economic distress
- Initiated, developed, implemented and directed policies, procedures, and programs to increase compliance, effectiveness, and efficiency
- Served as a key member on the classified staff and the certificated faculty bargaining teams

- Set and implemented vision for the Business Division and fostered Board of Education, district, and community confidence and satisfaction
- Participated in the professional, PTA, Foundation, City, and community organizations
- Played essential role in the renewal of local parcel tax (73% approval, March 2013)

Administrator Business, Services **2006 -10**
Glendale Unified School District (32 sites, 26,000 students)

- Served as the Administrator of Business Services managing budget development for capital improvement projects, purchasing, compliance reporting, and conversion of financial systems
- Led in constructing and modernizing school campuses and buildings (over $60 million)
- Converted District financial and human resources systems to County Office System from diverse antiquated systems to provide data driven finance

Director, Education Technology and Informational Services **2004 – 06**
Glendale Unified School District (32 sites; 6,432 workstations)

- Served as the Director of Educational Technology and Informational Services managing department budget and supporting all educational and business financial systems
- Led networking projects in school construction and modernization.
- Was a member of the Superintendent's Cabinet
- Developed and allocated the department budget and policy to meet district academic and financial priorities.
- Provided instructional and technological leadership to the District, certificated, and classified staff developing and implementing staff development.
- Modernized 12 year old financial system, finishing on time and under budget

Clinical Assistant Professor **2000-07**
University of Southern California

- Acted as dissertation chair for 19 Ed.D. doctoral candidates (2005- 09) investigating the topics of the *First 90 Days of the Superintendency* and *First 90 Days of the Principalship*
- Created and taught graduate courses in instructional technology theory and practice
- Founded and organized USC Superintendents' Technology Summit (2000-2)
- Acted as Ph.D. lead for parallel dissertation group focusing on instructional technology and policy

Director of Technology and Grants Development **1998-04**
Fullerton Joint Union High School District

- Led, conceptualized, participated, and partnered in grants totaling over $5 million, the majority focusing on educational technology.
- Initiated community partnerships with other districts, county offices, universities and vendors including Intel, Microsoft, Riverdeep, and Viewsonic.
- Organized professional development efforts to integrate technology into the classroom

- Envisioned, planned and oversaw the installation and maintenance of all district networks and computers.

Manager of Resources & Development; Technology for Learning Division 1996-98
Los Angeles County Office of Education (LACOE)

- Facilitated the creation of 15 technology consortia encompassing Los Angeles County's 1.7 million students and 81 school districts
- Interfaced regularly with over 60 superintendents and their district leaders
- Obtained grants totaling over $3.7 million.
- Facilitated technology plan creation in many school districts and for L.A.'s BEST, a city after-school program
- Managed and directed R&D technology unit
- Facilitated annual Technology for Learning Summit

Program Coordinator; Title VII Grant Manager; Video Liaison 1996
Palos Verdes Unified School District

- Developed and implemented curriculum in support of funding programs
- Proposed structure for the Entertainment Through Technology Academy
- Scripted, shot, edited, and coordinated cablecast of district instructional video projects; produced *High School Gab*.
- Taught advanced video course to high school and adult students
- Provided professional development in SDAIE methods
- Prepared evaluations and authored continuing grant proposals

Teacher; Spanish and ESL
1991-Chaffey Union High School District; Ontario, CA 1994-6

- Instructed Spanish-for-Spanish Speakers, Spanish, ELD classes
- Developed curriculum for a new English course with video/screenplay emphasis

Tamara Montero, CFE, SFO

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Overview of Qualifications

Experience with improving student achievement and local education agency accountability

Extensive experience in School Business Management

Customer Service

General Accounting Operations

Government & Cost Accounting

Budget Development

Grant Management

Oral/Written Communication

Organizational team building

School Business Management training provider

Computer Skills

QSS/QCC

Microsoft Office Products: Word, Excel, Outlook, PowerPoint, Publisher, Visio

Career Summary

Former Associate Superintendent of Administrative Services with 19 years of California school business management experience including both county office of education and small school district experience. Passionate about the education industry and a devoted professional always finding ways to improve service, accountability, and communication. Dedicated to professional development and training of current and future school business management professionals.

Professional Experience

Chief Analyst: Fiscal Crisis Management Assistance Team

July 2018 – present

Perform organizational and staffing reviews for local educational agencies, perform fraud investigations, analyze district solvency using the FCMAT Fiscal Health Risk Analysis, provide state-wide trainings on fiscal oversight, prepare curriculum for state-wide chief business official training programs administered by CASBO and FCMAT. Served as subject matter expert for the California Department of Education (CDE) and the SACS Software rewrite. Led the statewide effort in cooperation with CDE to train all users of the web-based SACS Software.

Associate Superintendent, Administrative Services: Yolo County Office of Education

June 2016 – June 2018

Oversee and direct administrative services department and operations, support school districts and Yolo County Office of Education staff in areas relating to accounting and auditing, budget development and review, financial accounting and reporting, purchasing, facilities and operations, technology and student achievement and accountability. Lead Professional Learning Network (LCAP and accountability) contributor and teacher. Partnered with SELPA Director leading the districts in Yolo County through the process of updating AB602 (Special Education) allocation formula and related policies.

Assistant Superintendent, Business Services: Tuolumne County Superintendent of Schools

March 2012 – June 2016

Plan, organize, control and direct operations and activities of the Business Services department including facilities, maintenance, technology, and budget including SELPA. Monitor county school district annual budgets for fiscal solvency. Successfully transitioned Tuolumne County Superintendent of Schools staff and *all* District business personnel from traditional QSS to QCC financial system. Redesigned the Business Services website to improve services to districts. Transitioned the County Schools from a single Federal Identification number to individual Federal identification numbers for each of the 11 districts in the county.

Tamara Montero, CFE, SFO

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Chief Business Official: Columbia Union and Belleview Elementary School Districts

July 2009 – March 2012

Budget planning and monitoring, board presentations, cash management, payroll, human resources, financial statement preparation, E-rate and grant management for *two* single site school districts. Supervise accounts payable, cafeteria and attendance staff. Fiscal management and close-out of a multi-million- dollar construction project as well as property lease negotiation.

Faculty: USC School Business Management Certificate Program

July 2009 – present

Create and present lessons on California School Finance in person and via web-based software. Guided the instructional team in the rewrite of the curriculum in 2014 to incorporate the changes with regards to laws surrounding Local Control Funding Formula. Topics include: SACS account code structure, balance sheet, year-end closing, recording revenues & expenditures, interim reports, multi-year projections cash flow and LCAP/Accountability. Grading of assignments as well as assisting students in all areas of the program.

Education

School Business Management Certificate, University of Southern California
June 2009
Bachelor of Business Administration, Morrison University
November 1996
University of Nevada, Reno
Attended August 1992 – June 1995

Certifications

Certified Fraud Examiner (ACFE issued)
ASBO Certified Administrator of School Finance and Operations (SFO)

Professional Development Activities

USC School Business Management Certificate Program, Faculty
Former CASBO CBO Certificate Program, instructor
FCMAT Mentor Program, mentor
FCMAT Coaching and Induction Program, facilitator

PAMELA LAUZON

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SUMMARY

Experienced in the operation and supervision of School District Business Services Division. Extensive experience in budget development, monitoring and projections which are essential in providing Fiscal Stability in all school districts. Preparation of all financial reports for the School Board, State and Federal agencies.

EXPERIENCE

10/2021 to 7/1/2025 **Educational Consultant - Fagan Friedman Fulfrost**

Independent contractor providing executive coaching and other services ranging from board training to fiscal and technical issues related to school district leadership, fiscal issues and governmental issues. Currently assigned by the California Department of Education (CDE)to San Francisco Unified School District first as one of two Fiscal Experts and now as one of two Fiscal Advisors.

10/2010 to present **School District Consultant - Business Services**
Self Employed — Riverside, CA

Provide fiscal/accounting assistance and direction as a consultant to school districts in Riverside County when they need additional or interim assistance. I also worked with Riverside County Office of Education as a fiscal expert when they needed to assist a school district that was experiencing financial difficulties.

03/2021 to 07/2021 **Interim Chief Business Officer**
Riverside Unified School District
Supervised departments in Business Services Division, while district was recruiting for new CBO. I was active in Cabinet during Budget and LCAP Development for the 2021/22 Fiscal Year.

03/2014 to 03/2017 **Interim Chief Business Officer**
Menifee Union School District — Menifee, CA
Supervised departments in Business Services Division - Budget, Accounting, Benefits, Facilities, Maintenance and Transportation. Developed budget and prepared financial reports for submission to the School Board, County Office and State.

02/2003 to 10/2010 **Assistant Superintendent, Business Services**
Jurupa Unified School District — Jurupa Valley, CA
Supervised all departments in the Business division - Budget, Accounting, Payroll, Benefits, Purchasing, Maintenance, Facilities and Transportation. Experienced in supervision of departments, negotiations, budget development, monitoring, projections and fiscal reporting.

04/1984 to 02/2003 **Director Business Services**

Jurupa Unified School District — Jurupa Valley, CA

Supervised Business Services Department - Budget, Accounting, Payroll and Benefits. Responsible for budget development, monitoring and reporting on financial status of school district. Involved in negotiations for employee insurance benefits.

EDUCATION AND TRAINING

CBO Certification - CASBO

CSUSB – San Bernardino, CA

California Baptist University — Riverside, CA

ACTIVITIES AND HONORS

Member, California Association School Business Officials

Member, Association California School Administrators