



California Schools JPA<sup>SM</sup>

EMPLOYEE BENEFITS | RISK MANAGEMENT

# Welcome to the California Schools JPA

[www.csjpa.org](http://www.csjpa.org)

## Board of Directors Administration Orientation

California Schools Employee Benefits Association (CSEBA)  
California Schools Risk Management (CSRM)  
1950 S. Sunwest Lane, Suite 100  
San Bernardino, California 92408  
909-763-4900  
<https://www.csjpa.org/>

Revised: June 13, 2025



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## Our Purpose

Support the strategic initiative of our member Presidents/Superintendents to promote employee well-being and safety.

## Mission Statements

### California Schools Employee Benefits Association (CSEBA)

To be the premier provider of quality, cost-effective employee benefit programs, services, and resources tailored to the needs of our members.

### California Schools Risk Management (CSRM)

Promote student achievement by optimizing the financial and human resources of member districts through high-quality risk financing and loss reduction services.

## Core Values

### Communication

Build relationships to gain trust, pursue goals, and inspire positive change through transparency

### Fiscal Responsibility

We believe in our responsibility to protect the net assets of the organization to support safety, quality of care, and long-term stability

### Integrity

We believe in being honest, transparent, and committed to doing what's best for our members and organization

### Leadership

Lead by placing the needs of others first while remaining focused on organizational goals

### Transparency

Communicate information to produce greater understanding

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## Board Member Resources and Information

*The JPA website provides resources and information on programs and services offered by the JPA to its members.*

### California Schools JPA Website

<https://csjpa.org/>

Property and liability • Workers' compensation • Employee assistance programs • Health advocacy • Safety planning • Loss control • Emergency planning

Current and Past Executive Committee and Board of Directors meeting agendas and minutes are posted on the website.

**Board Member Toolkit** (listed under Resources/CSJPA/Board Member Toolkit)

- Approved California Schools JPA Meeting/Events Calendars (CSEBA and CSRM) for the fiscal year can be found on the CSJPA website under Board Member Toolkit: <https://www.csjpa.org/board-member-toolkit>

### The Learning Institute (TLI)

<https://www.csjpa.org/training>

The California Schools Joint Powers Authority (CSJPA) hosts various training seminars and workshops. Our training is designed to provide liability and workers' compensation solutions. Our classroom, online, and extension training are free of charge to our members. District staff is encouraged to attend workshops that may apply to their job classification regardless of which programs they participate in with CSJPA.



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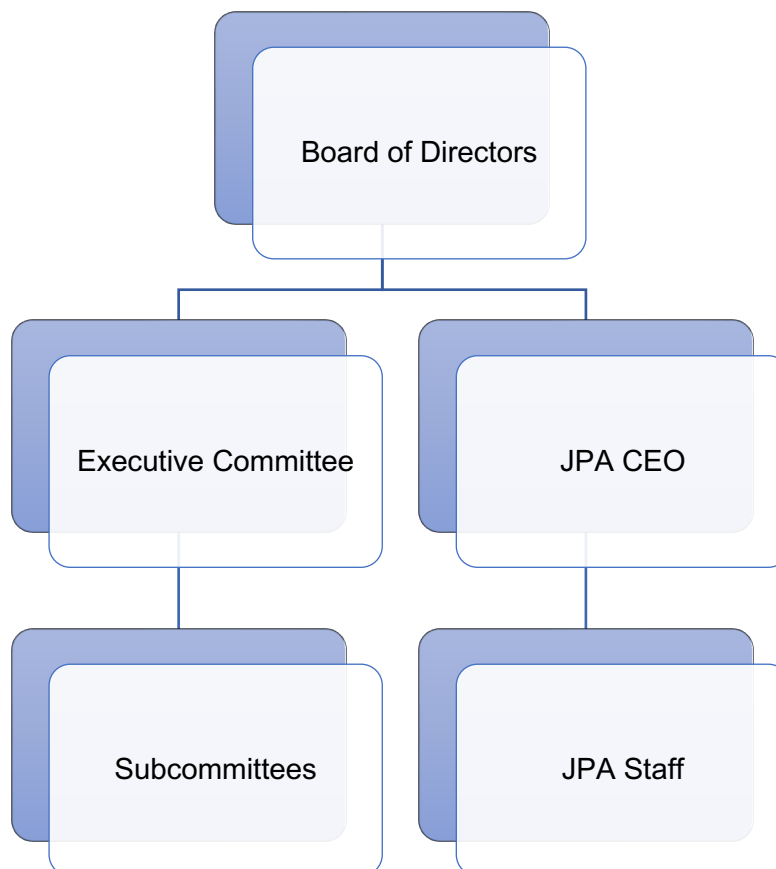
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## JPA Governance

The Board of Directors for CSEBA and CSRM is comprised of representatives from each member district, providing each member with an equal voice and equal vote in governance.

**The California Schools JPA is member-driven**

- Board of Directors
  - Executive Committees
    - Subcommittees



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## Governing Documents

CSRM and CSEBA have separate governing documents specific to their programs, products, and services.

- **Bylaws**
  - Rules adopted by the JPA organization chiefly for the government of its members and the regulation of its affairs.
- **Board Policy**
  - Board policies are statements that set forth the purposes and prescribe, in general terms, the organization and program of the JPA.
- **Agreement\***
  - A **Joint Powers Authority agreement** is a formal, legal **agreement\*** between two or more public agencies.
    - \* District members first enter into an agreement with CSEBA and JPA upon approval from their district school board.
    - \* If an amendment to the original agreement is required, the CSEBA Board of Directors will approve it.
    - \* The JPA will send the proposed amended agreement to the district superintendent and notify Board members. The proposed amendment must be placed on the next school board agenda for approval.
    - \* The agreement must be signed by the school board secretary and stamped with the official school seal.
    - \* The approved and signed amended agreement is then returned to the JPA.

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## Board of Directors Appointments

- Each member district is entitled to appoint district employees as representatives to the Board of Directors.
- A letter signed by the district superintendent or community college president is submitted to the JPA on official district/college letterhead. The letter provides the name(s) and email address(es) of the appointed Board member(s) and their effective date.
- Member districts are entitled to make changes to their Board representatives at any time by providing an updated appointment letter on official letterhead, an original signature of the superintendent or president, and the name(s) and email(s) of the new Board member(s).
- Board appointment letters are sent to the JPA office, where the Administrative Services Specialist will inform other JPA staff and update email and communication distribution lists.
- The Board appointments for CSRM are as follows:
  - Primary Management
  - Alternate Management
- The Board appointments for CSEBA are as follows:
  - Primary Management
  - Alternate Management
  - Primary Labor
  - Alternate Labor



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## Board of Directors Meetings

The Board of Directors meets three times per fiscal year.

- An Annual Meeting and Events Calendar is provided each year with all dates for Board, Executive Committee, Sub-Committees, and other JPA meetings and events.
- Calendar invites are sent out to secure future Board meeting dates with all appointed Board representatives.
- All meetings are held in the California Schools JPA Conference Room unless otherwise specified on the calendar of meetings/events.
- It's requested that board members respond to the calendar invite regarding matters of quorum.
- Board members can use a virtual platform if they cannot attend in person.
  - Suppose participation will be via a virtual platform. In that case, the Board member must communicate this to the JPA Administrative Services Specialist and provide the physical location of the participation site for listing on the agenda.
- A quorum is one-third (1/3) of the Members (either primary or alternate) of the JPA, but not both, shall constitute a quorum.
  - A quorum shall continue if one or more representatives leave after a meeting is called to order.



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## Board Member Roles and Responsibilities

*As a Board member, you represent the member district and act on what's best for your JPA.*

Board member roles:

- Appointed Board members attend all scheduled Board of Directors meetings or have their Alternate participate in their place.
  - Alternates should also attend for continuity and succession planning.
- Prepare and participate in the Board of Directors meetings by reviewing the agenda packet in advance.
- Participate in a subcommittee or advisory group.
- Attend the Annual JPA Conference.

Board member responsibilities:

- Reply to communications regarding attendance at Board meetings.
  - Will your participation be in person or virtually?
- Arrive or log on to the meeting promptly to ensure a quorum after the roll call.
  - If you are arriving late, contact the JPA Administrative Services Specialist.
- Submit the annual conflict-of-interest disclosure and update it if necessary (Form 700).
- Follow the JPA's bylaws, policies, and board resolutions.
- Inform the JPA if you will no longer be a representative on your Board.





## Agenda Packets and Meeting Notifications

- The Board approved a calendar of meetings and events to send out SAVE THE DATE calendar invites for all future meetings and events.
- Agenda packet distribution:
  - The original Save the Date calendar invite will be updated to include a link to access a complete agenda packet and other participation information.
    - The NOTES section of the calendar invite will have the information listed above.
  - If participating virtually, a Zoom link is needed to access the meeting, and the location to attend in person is also provided on the agenda.
  - Members are asked to accept or decline the updated calendar invite; this will help JPA staff ensure a quorum for the meeting.
  - If attending in person, only copies of the agenda will be available; complete agenda packets are not provided.
    - Members are asked to download the complete agenda packet to the electronic device they use to view it during meetings.



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## Board Member Required JPA Forms

The following forms must be kept on file at the JPA office.

- Conflict-of-Interest Submission – Form 700 (required)
  - Annual submission by all current Board Members
- Authorization to Pay Non-Employee Expenses Form (required)
  - One-time submission to the JPA

The forms can be found on the CSJPA website under Board Member Toolkit:

<https://www.csjpa.org/board-member-toolkit>



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## Conflict of Interest - Form 700

Board members must complete Page 6 and return their original signature to the JPA Administrative Services Specialist. The State of California legally requires this form, which must be filed with the JPA.

- Every elected official and public employee who makes or influences governmental decisions must submit a Statement of Economic Interest, also known as Form 700. Form 700 provides transparency and ensures accountability:
  - It provides information about an official's financial interests to ensure that officials make decisions in the public's best interest and not enhance their finances.
  - It serves as a reminder to public officials of potential conflicts of interest so that they can abstain from making or participating in governmental decisions that are deemed conflicts of interest.
- Board members will submit a Form 700 when appointed to the Board, at the beginning of every new calendar year, and upon leaving the Board.
  - Board members who receive anything that could be considered a "gift" from a JPA vendor or partner must keep track of those items:
    - List what was received: physical objects, tickets, or meals.
    - Record the estimated costs of those gifts and disclose if the total reaches the FPPC Gift Limit for the year (the amount can be found inside the FPPC booklet).
    - The FPPC booklet also has information on other fiscal conflicts that must be disclosed.
- **The JPA is the filing agent; all Board Members would submit their annual Form 700 to the JPA with either a “wet” or electronic signature.**

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## Authorization to Pay Non-Employee Expenses Form

This form is filed with the JPA office and authorizes expenses or costs associated with a Board Member's attendance at any JPA-hosted or approved conference or event.

Board members are asked to fill out the top portion, sign, obtain the necessary signatures in the section **District Approved** as shown, and return to the JPA. The JPA Administrative Services Specialist will obtain the remainder of the signatures needed in the area of Superintendent/JPA/SBCSS Approval.

- Authorization to Pay Non-Employee Expenses form
  - The Administrative Agent requires all Board members to have a form on file for individual and member district reimbursement requests.
  - The form allows the JPA to make conference registrations, travel arrangements, and secure hotel accommodations on behalf of the Board member.
  - The form is provided to all newly appointed Board members
    - As stated on the record, members must obtain signatures from the upper school district or community college administration.
    - Upon return to the JPA Administrative Services Specialist, the final required signatures will be secured, and the form will be kept on file at the JPA.



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## JPA Conference and Travel Reimbursement Guidelines

Members of the Board of Directors are encouraged to attend conferences, professional development, and training seminars when the purpose of such activities is to improve the operations of their specific pool or the ability of the Board Members to perform their duties more effectively.

The reimbursement program allows Board members the flexibility to attend conferences, professional development, and training seminars that benefit the pool by expanding their knowledge in specific areas.

Each JPA (CSEBA/CSRM) can review a copy of the JPA Conference and Reimbursement Guidelines on the website under the Board Member Toolkit.

<https://www.csjpa.org/board-member-toolkit>



## District Reimbursement on behalf of the Board Member(s)

- Members of the Board of Directors shall be authorized to attend conferences/events pre-approved by the California Schools JPA. The JPA shall reimburse the member district up to a specific amount per fiscal year. Board Members wishing to attend such functions under this policy shall notify the JPA to verify available funds.
- Reimbursement shall be for actual and necessary expenses incurred for attending the event, which fall under the policies of the JPA Administrative Agent.
- Board Members may use the allotted funds on a single event or spread them out to cover the costs of various conferences throughout the fiscal year. When funds have been exhausted, the member district will be responsible for any costs beyond the allocated amount.
- **District Reimbursement** requests will be submitted using the JPA Conference and Travel Reimbursement form.
  - The member district will fill out the costs for which they seek reimbursement, the name of the Board Member, the event title, date, and location.
  - The district CBO/CFO must sign the form with all the supporting documentation listed in the JPA Conference and Travel Reimbursement Guidelines and submit it to the JPA Administrative Services Specialist.



## Individual Board Member Travel Reimbursement

Board members are entitled to reimbursement for necessary expenses incurred for attending an approved conference or event, which fall under the policies of the JPA Administrative Agent.

- Mileage to attend scheduled Board or Executive Committee meetings or events will be reimbursed based on the Administrative Agent's Policy on Travel Authorization/Reimbursement:
  - SBCSS 3314.4 - Procedure - Travel Authorization/Reimbursement
- Reimbursement requests will be submitted using the JPA Board Member Reimbursement form.
  - Board members will fill out the top portion (where to send checks), their appointed district, and what meeting/event they attended (name and date), and sign at the bottom.
  - Enter round-trip miles based on their work site or home site (whichever is closest to the location of the meeting or event).
    - The annual mileage amount is determined annually by the Federal Government.
    - A Google Maps or other site that shows the transportation distance to and from the trip destination must also be provided.
  - For meals, submit original itemized receipts.
  - Review form for additional Itemized Reimbursable Expenses.



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### Who to Contact at the JPA

<https://www.csjpa.org/staff>

Main Office Line: 909-763-4900

#### Administration

**Javier Gonzales, Ext. 914**

Chief Executive Officer

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**Teresa Saenz, Ext. 901**

Administrative Services Specialist

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**Jamie Adkins, Ext. 915**

Administrative Services Specialist

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#### Communications

**Tiffany Eggleston 917**

Senior Marketing Specialist

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Training Manager

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Web/Digital Media Developer

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Office Specialist III

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#### Finance

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**Sofia Alba, Ext. 912**

Insurance Finance Specialist

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### Property & Liability

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**Felipe Garcia, Ext. 908**

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### Claims

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## Employee Benefits

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## CSEBA Mobile APP



**24/7 Access to  
all CSEBA  
Benefits via the  
mobile app**

## CSEBA Wellness APP



The intent is to create an engaging, well-rounded approach to inspire well-being behaviors.

A mixture of activity types

- Videos
- Surveys/Polls
- Articles with self-tracking
- Device-tracked physical activity
- Team challenges

Diverse tracking frequency

- One time
- Weekly/monthly
- Track by end date

