



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

Welcome to the California Schools JPA

www.csjpa.org

Board of Directors Administration Orientation

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

Revised: January 8, 2026



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

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

Revised: January 8, 2026



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

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 CSRSM) 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.

Revised: January 8, 2026



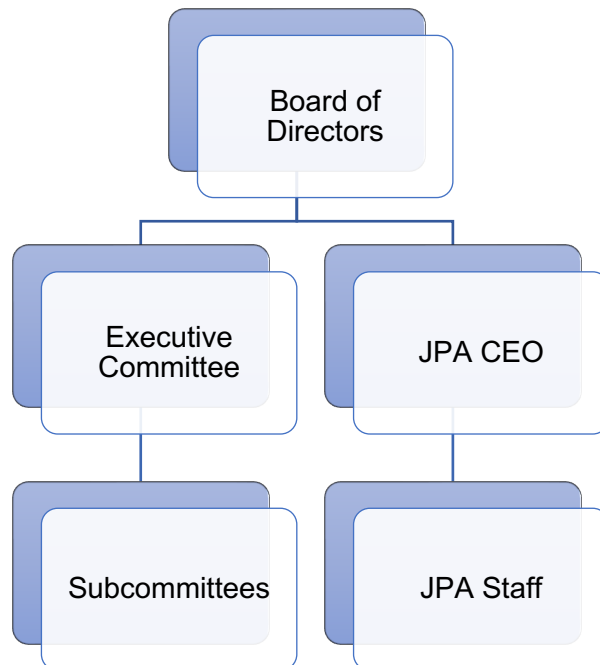
JPA Governance

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

Role of the Board of Directors: steer the JPA towards a sustainable future by adopting sound, ethical, and legal governance and financial management policies, as well as by making sure the JPA has adequate resources to advance its missions.

The California Schools JPA is member-driven

- Board of Directors
 - Executive Committees
 - Subcommittees





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.



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 CSRSM are as follows:
 - Primary Management
 - Alternate Management
- The Board appointments for CSEBA are as follows:
 - Primary Management
 - Alternate Management
 - Primary Labor
 - Alternate Labor



Board of Directors Meetings

The Board of Directors meets three times per fiscal year.

- An Annual Meeting and Events Calendar is provided each year, listing all dates for Board, Executive Committee, Subcommittees, 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 are unable to 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.



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

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 by videoconferencing?
- 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.

Revised: January 8, 2026



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 required to access the meeting. The location for in-person attendance 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.



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

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>

Revised: January 8, 2026



Conflict of Interest - Form 700

Board members must complete Page 6 and return their original or electronic 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 serves as the filing agent; all Board Members are required to submit their annual Form 700 to the JPA, which can be signed either with a "wet" or electronic signature.**



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

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.

Revised: January 8, 2026



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

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>

Revised: January 8, 2026



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.



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

California Schools JPA CSEBA & CSRM Committees

Executive Committee: The Executive Committee is authorized to perform all necessary functions not within the exclusive authority of the Board of Directors, as directed by the Board of Directors for the Executive Committee's handling. Members of this committee are comprised of member representatives and elected to serve by the Board of Directors.

Finance Committee: At the direction of the Executive Committee, a Finance Committee was created to review and evaluate the impact of financial decisions on the JPA. The objective is to conduct an ongoing financial review to keep the Executive Committee and the Board of Directors fully informed of the pool's financial activities. The Chair reports on the activities of the Finance Committee.

Governance and Operations Committee: Each JPA regularly reviews and clarifies its governing and operational documents. In line with each JPA's Strategic Goals, a committee was formed for each JPA. This committee consists of members from both the Executive Committee and the Board.

Nominations Advisory Group: Is a short-term group that meets as needed for the annual elections and to fill any vacancies on the Executive Committee. The groups manage the election process and report to the Board. A member of the Board serves as Chair, in addition to other board members who comprise the advisory group. The advisory group informs the Board of Directors of the upcoming election, contacts members wishing to submit their candidacy, answers questions, and submits the names of any potential candidates to the JPA for placement on the election ballot.

Claims Committee: California Schools Risk Management (CSRM) has historically engaged with members and partners to identify loss reduction programs and develop policies and procedures to keep students and employees safe, control claim-related costs, and prevent/reduce losses. The CSRM Claims Committee was established to address member needs, claim-related issues, provide training for members, develop cost containment strategies, and monitor legislative changes that may impact claims.

Community College Focus Group: California Schools Risk Management (CSRM) has reaffirmed its commitment to our community college members. CSRM has established a community college focus group, and the purpose of the committee is to foster and maintain a dialogue, discuss general concerns affecting the districts, review policies and procedures, provide opportunities for professional development, and collaborate to solve community college-wide problems.



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

The Youth Protection Focus Group, in collaboration with California Schools Risk Management (CSRM), hosts a quarterly forum where school districts come together to share resources, discuss challenges, and learn from one another on topics related to youth protection. The group focuses on preventing child abuse and misconduct by strengthening prevention practices, increasing staff awareness, and promoting safer learning environments. Through shared discussion and practical guidance, the goal is to reduce risk and help districts avoid future incidents and claims, while also maintaining compliance with regulatory requirements.



California Schools JPA Member Districts

 CSR Members

 CSEBA Members

 CSR & CSEBA Members

A–E

-  Adelanto Elementary School District
-  Alta Loma School District
-  Apple Valley Unified School District
-  Baker Valley Unified School District
-  Baldy View Regional Occupational Program
-  Barstow Community College District
-  Barstow Unified School District
-  Bassett Unified School District
-  Bear Valley Unified School District
-  Beaumont Unified School District
-  BestNet JPA
-  Brea-Olinda Unified School District
-  CAHELP JPA
-  Central School District
-  Centralia School District
-  Chaffey Community College District
-  CharterSAFE
-  Chino Valley Unified School District
-  College & Career Advantage
-  Colton Joint Unified School District
-  Colton-Redlands-Yucaipa Regional Occupational Program
-  Copper Mountain Community College District
-  Covina-Valley Unified School District
-  Cucamonga School District
-  San Gabriel Valley Regional Occupational Program










- Encinitas Union School District
- ■ Etiwanda School District
- Excelsior Charter School

F–O

- Helendale School District
- Hemet Unified School District
- ■ Hesperia Unified School District
- Laguna Beach Unified School District
- Lucerne Valley Unified School District
- ■ Morongo Unified School District
- ■ Mt. Baldy Joint School District
- ■ Mountain View School District
- Needles Unified School District
- North Orange County Regional Occupational Program
- Ontario-Montclair School District
- ■ Oro Grande School District

P–Z

- Ramona Unified School District
- Rialto Unified School District
- ■ Rim of the World Unified School District
- Riverside Community College District
- Riverside Unified School District
- ■ San Bernardino City Unified School District
- San Bernardino Community College District
- ■ San Bernardino County Superintendent of Schools
- ■ San Gabriel ROP
- San Gabriel Unified School District
- San Marino Unified School District
- Santee School District
- Savanna School District
- Silver Valley Unified School District
- Snowline Joint Unified School District
- South Pasadena Unified School District

-  Southern Kern Unified School District
-  Summit Leadership Academy
-  Upland Unified School District
-   Victor Elementary School District
-  Victor Union High School District
-  Victor Valley Community College District
-  Westminster School District
-  Yucaipa-Calimesa Joint Unified School District



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

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

jgonzales@csjpa.org

Teresa Saenz, Ext. 901

Administrative Services Specialist

tsaenz@csjpa.org

Jamie Adkins, Ext. 915

Administrative Services Specialist

jadkins@csjpa.org

Communications

Tiffany Eggleston 917

Senior Marketing Specialist

teggleston@csjpa.org

Siegfried Cardeno, Ext. 932

Training Manager

scardeno@csjpa.org

Yulin Karaiscos, Ext. 920

Web/Digital Media Developer

ykaraiscos@csjpa.org

Fololia "K" Koloamatangi, Ext. 930

Office Specialist III

fkoloamatangi@csjpa.org

Finance

Yolanda Comer, Ext. 910

Chief Financial Officer

ycomer@csjpa.org

Kandy Delgado, Ext. 931

Finance Manager

kdelgado@csjpa.org

Sofia Alba, Ext. 912

Insurance Finance Specialist

salba@csjpa.org

Irene Shenouda, Ext. 924

Insurance Finance Specialist

ishenouda@csjpa.org

Employee Benefits

Britany Wooten, Ext. 904

Employee Benefits Manager

bwooten@csjpa.org

Brenna Dorado, Ext. 925

Senior Benefits Account Manager

bdorado@csjpa.org

Francisco Rodriguez, Ext. 922

Senior Benefits Account Manager

frdriguez@csjpa.org

Sonia Lubelski, Ext. 929

Benefits Account Manager

slubelski@csjpa.org

Jessica Cundieff, Ext. 921

Benefits Account Manager

jcundieff@csjpa.org

Updated: March 25, 2026



California Schools JPASM

EMPLOYEE BENEFITS | RISK MANAGEMENT

Property & Liability

MaryAnn Boice-Ceja, Ext. 907

Safety/Loss Control Manager

mboiceceja@csjpa.org

Austin Mitchell, Ext. 905

Senior Risk Manager

amitchell@csjpa.org

Felipe Garcia, Ext. 908

Senior Risk Manager

fgarcia@csjpa.org

Kimberly Escandon, Ext. 918

Senior Risk Manager

kescandon@csjpa.org

Vacant, Ext. 906

Senior Risk Manager

Vacant, Ext. 916

Senior Risk Manager

Claims

Sandy Avina, Ext. 919

Claims Services Manager

savina@csjpa.org

Lucia Garcia, Ext. 927

Claims Assistant

lgarcia@csjpa.org

Ed Lee, Ext. 902

Claims Manager

elee@csjpa.org

Sherri Williams, Ext. 909

Workers' Compensation Manager

swilliams@csjpa.org

Jennifer Collins, Ext. 903

Workers' Compensation Manager

jcollines@csjpa.org

Updated: March 25, 2026

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

