

PERALTA COMMUNITY COLLEGE DISTRICT
Board of Trustees Agenda Report
For the Trustee Meeting Date of May 12, 2015

ITEM TITLE:

Consider approval of Independent Contractor Agreement for Chad Thompson to provide continued services for PASS Grant – Financial Opportunity Center (FOC) at Merritt College

SPECIFIC BOARD ACTION REQUESTED:

Consider approval of Independent Contractor Agreement for Chad Thompson to provide continued services for Financial Opportunity Center (FOC) at Merritt College. Requesting Board action on independent contractor agreement between Chad Thompson and Merritt College to extend the contract date from 5/31/15 to 6/30/15 and to increase the funds by \$5,000.

ITEM SUMMARY:

Chad Thompson will continue to provide services and close out the program. In addition, he will render additional follow up with potential investors for Single Stop at Merritt College.

SOURCE OF FUNDS (AND FISCAL/BUDGETARY IMPACT):

Peralta Accountability for Student Success (PASS) Grant. Increase ICC#19503 (Chad Thompson) by \$5,000 for a total of \$43,250.

BACKGROUND/ANALYSIS:

The FOC will continue to increase student success through financial literacy.

DELIVERABLES AND SCOPE OF WORK:

- Reach students and market the Financial Opportunity Center program, and increase financial literacy awareness on campus.
- Prepare, schedule and present 20 in-depth workshops (55 minutes) on various financial topics, including: Understanding your credit report, banking, budgeting, money management, and bankruptcy.
- Prepare and present introductory/outreach workshops (10 minutes) for all mandatory New Student Orientations as well as for classrooms by faculty request.
- Enroll at least 50 students in the Financial Literacy Coaching: Pull and review initial credit reports/scores, and records relevant financial and personal information for student data.
- Schedule regular individual meetings with program members: pull subsequent credit reports/scores when applicable, coach students on credit building strategies, banking practices, and support new budgeting techniques (either weekly or monthly, depending on situation).
- Provide regular status updates, as needed, to the relevant Dean and/or VPSS (as well as the President).
- Continue services and close out program.
- Solicit potential investors for Single Stop.

ANTICIPATED COMPLETION DATE: JUNE 30, 2015

ALTERNATIVES/OPTION:

EVALUATION AND RECOMMENDED ACTION:

OTHER DEPARTMENTS IMPACTED BY THIS ACTION (E.G. INFORMATION TECHNOLOGY):

YES _____ NO X

COMMENTS:

WHO WILL BE PRESENTING THIS ITEM AT THE BOARD MEETING? PRESIDENT, DR. AMBRIZ-GALAVIZ

(*****Board contract approval is subject to negotiation and execution by the Chancellor.)

DOCUMENT PREPARED BY:

Prepared by: Dr. Lilia Chavez, Acting Vice President of Student Services Date: April 30, 2015
[Enter Here - Your Name and Title of Individual]

DOCUMENT PRESENTED AND APPROVED BY:

Presented and approved by: Dr. Norma Ambriz-Galaviz, President Date: April 30, 2015
[Enter Here - Name of College President, (if originating from a college) or Vice-Chancellor (if originating from the District)]

FINANCE DEPARTMENT REVIEW

X Finance review required _____ Finance review *not* required

If Finance review is required, determination is: X Approved _____ Not Approved

If not approved, please give reason: _____

Signature: Susan Rinne
Susan Rinne, Interim Vice Chancellor for Finance and Administration

GENERAL COUNSEL (Legality and Format/adherence to Education Codes):

_____ Legal review required X Legal review *not* required

If Legal review is required, determination is: _____ Approved _____ Not Approved

Signature: _____
Nitasha Sawhney, Acting General Counsel

CHANCELLOR'S OFFICE APPROVAL

Approved, and Place on Agenda

Not Approved, but Place on Agenda

Signature: Dr. José M. Ortiz
Dr. José M. Ortiz, Chancellor