

Application Form

Profile

Glenn _____
 First Name

Pena _____
 Last Name

 Middle Initial

 Home Address

 City

 Suite or Apt

CA _____
 State

94608 _____
 Postal Code

Home: _____
 Primary Phone

 Email Address

[District Locator Tool](#)

Resident of Supervisorial District:

N/A - Out of County

Contra Costa County Office of Education _____
 Employer

Director, External Business Services _____
 Job Title

Length of Employment

4+

Do you work in Contra Costa County?

Yes No

If Yes, in which District do you work?

Contra Costa County Office of Education

How long have you lived or worked in Contra Costa County?

4+

Are you a veteran of the U.S. Armed Forces?

Yes No

Board and Interest

Which Boards would you like to apply for?

Treasury Oversight Committee: Submitted

Seat Name

Committee Alternate

Have you ever attended a meeting of the advisory board for which you are applying?

Yes No

If Yes, how many meetings have you attended?

3

Education

Select the option that applies to your high school education *

High School Diploma

College/ University A

Name of College Attended

UCLA

Degree Type / Course of Study / Major

Economics

Degree Awarded?

Yes No

College/ University B

Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

Yes No

College/ University C

Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

Yes No

Other Trainings & Occupational Licenses

Other Training A

Certificate Awarded for Training?

Yes No

Other Training B

Certificate Awarded for Training?

Yes No

Occupational Licenses Completed:

Qualifications and Volunteer Experience

Please explain why you would like to serve on this particular board, committee, or commission.

I currently hold the position of Director, External Business Services at CCCOE, replacing Christine Rea who has retired. She was the alternate committee member.

Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)

I'm currently the Director, External Business Services at CCCOE. My department has AB 1200 oversight of all local educational agencies in Contra Costa County. Prior to this position, I served as Director of Fiscal Services at Acalanes Union High School District. I have more than 30 years work experience in accounting in both private and public sectors. See attached resume.

Upload a Resume

Would you like to be considered for appointment to other advisory bodies for which you may be qualified?

Yes No

Do you have any obligations that might affect your attendance at scheduled meetings?

Yes No

If Yes, please explain:

other scheduled business meetings

Are you currently or have you ever been appointed to a Contra Costa County advisory board?

Yes No

If Yes, please list the Contra Costa County advisory board(s) on which you are currently serving:

Treasury Oversight Committee

If Yes, please also list the Contra Costa County advisory board(s) on which you have previously served:

List any volunteer or community experience, including any advisory boards on which you have served.

2015 - 2020 Board alternate - Contra Costa County Schools Insurance Group
2015 - 2020 Board alternate - East Bay Schools Insurance Group

Conflict of Interest and Certification

Do you have a familial or financial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed under the "Important Information" section below or Resolution No. 2021/234)

Yes No

If Yes, please identify the nature of the relationship:

Do you have any financial relationships with the County such as grants, contracts, or other economic relationships?

Yes No

If Yes, please identify the nature of the relationship:

Please Agree with the Following Statement

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.

I Agree

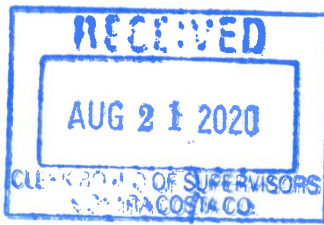
Important Information

Glenn Pena

1. This application and any attachments you provide to it is a public document and is subject to the California Public Records Act (CA Government Code §6250-6270).
2. All members of appointed bodies are required to take the advisory body training provided by Contra Costa County.
3. Members of certain boards, commissions, and committees may be required to: (1) file a Statement of Economic Interest Form also known as a Form 700, and (2) complete the State Ethics Training Course as required by AB 1234.
4. Meetings may be held in various locations and some locations may not be accessible by public transportation.
5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.
7. As indicated in Board Resolution 2021/234, a person will not be eligible for appointment if he/she is related to a Board of Supervisors' member in any of the following relationships:
 - (1) Mother, father, son, and daughter;
 - (2) Brother, sister, grandmother, grandfather, grandson, and granddaughter;
 - (3) Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter;
 - (4) Registered domestic partner, pursuant to California Family Code section 297;
 - (5) The relatives, as defined in 1 and 2 above, for a registered domestic partner;
 - (6) Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate.



Contra
Costa
County



Print Form

Please return completed applications to:

Clerk of the Board of Supervisors
651 Pine St., Room 106
Martinez, CA 94553

or email to: ClerkofTheBoard@cob.cccounty.us

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

First Name

GLENN

Last Name

PENA

Home Address - Street

[REDACTED]

City

[REDACTED]

Zip Code

94608

Phone (best number to reach you)

[REDACTED]

Email

[REDACTED]

Resident of Supervisorial District:

NO

EDUCATION

Check appropriate box if you possess one of the following:

High School Diploma

CA High School Proficiency Certificate

G.E.D. Certificate

Colleges or Universities Attended

UCLA

Course of Study/Major

ECONOMICS

Degree Awarded

Yes No

Yes No

Yes No

Other Training Completed:

[REDACTED]

Board, Committee or Commission Name

TREASURY OVERSIGHT COMMITTEE

Seat Name

COMMITTEE ALTERNATE

Have you ever attended a meeting of the advisory board for which you are applying?

No

Yes

If yes, how many?

[REDACTED]

Please explain why you would like to serve on this particular board, committee, or commission.

I currently hold the position of Director, External Business Services at CCCOE, replacing Christine Rea who has retired. She was the alternate committee member.

Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)

I'm currently the Director, External Business Services at CCCOE. My department has AB 1200 oversight of all local education agencies in Contra Costa County. Prior to this position, I served as Director of Fiscal Services at Acalanes Union High School District. I have more than 30 years work experience in accounting in both private and public sectors. See attached resume.

I am including my resume with this application:

Please check one:

Yes

No

I would like to be considered for appointment to other advisory bodies for which I may be qualified.

Please check one:

Yes

No

Are you currently or have you ever been appointed to a Contra Costa County advisory board?

Please check one: Yes No

List any volunteer and community experience, including any boards on which you have served.

2015-2020 Board alternate - Contra Costa County Schools Insurance Group
2015-2020 Board alternate - East Bay Schools Insurance Group

Do you have a familial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed below or Resolution no. 2011/55)

Please check one: Yes No

If Yes, please identify the nature of the relationship:

Do you have any financial relationships with the county, such as grants, contracts, or other economic relationships?

Please check one: Yes No

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand and agree that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.

Signed:

[Redacted Signature]

Date:

08/18/2020

Submit this application to:

Clerk of the Board of Supervisors
651 Pine St., Room 106
Martinez, CA 94553

Questions about this application? Contact the Clerk of the Board at (925) 335-1900 or by email at ClerkofTheBoard@cob.cccounty.us

Important Information

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5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.
7. As indicated in Board Resolution 2011/55, a person will not be eligible for appointment if he/she is related to a Board of Supervisors member in any of the following relationships: mother, father, son, daughter, brother, sister, grandmother, grandfather, grandson, granddaughter, great-grandfather, great-grandmother, aunt, uncle, nephew, niece, great-grandson, great-granddaughter, first-cousin, husband, wife, father-in-law, mother-in-law, daughter-in-law, stepson, stepdaughter, sister-in-law, brother-in-law, spouse's grandmother, spouse's grandfather, spouse's granddaughter, and spouses' grandson, registered domestic partner, relatives of a registered domestic partner as listed above.
8. A person will not be eligible to serve if the person shares a financial interest as defined in Government Code §87103 with a Board of Supervisors Member.

PROFILE

Detail-oriented, organized, and efficient accounting professional with a portfolio of success in all areas of accounting operations, office administration, and management information system across education, healthcare, logistics, and engineering/construction industries. Progressively responsible duties gained over the course of a career based on exceptional analytical and organizational skills. Instrumental in significantly cutting operational costs by streamlining and automating processes through technological upgrades and continuous process improvement efforts. Equal ability to work autonomously and as supportive team player. Adept at learning new computer systems and languages and business intelligence software tools quickly. Exemplary written and verbal communication and presentation skills. Specific skills and knowledge include: accounts payable, accounts receivable, payroll, general ledger, budgeting, benefits, asset management, financial analysis, data modeling, data mining, ad-hoc report writing.

Technical Expertise includes:

- Advanced Excel, Access, Word, Information Builder's Focus Language • SQL • User Training and Support
 - Data Analysis • Report Writing • Cost-Cutting • Process Improvements
 - MUNIS and Oracle Financials including Accounts Payable, Accounts Receivable, General Ledger, Budget, Purchasing • Quickbooks • Audit Command Language • Visual Basic for Applications • Windows Clients/Servers
-

PROFESSIONAL EXPERIENCE

CONTRA COSTA COUNTY OFFICE OF EDUCATION, Pleasant Hill, CA
A local education agency.

08/2020–Present

Director, External Business Services

- Plan, organize, control, and direct operations and activities of District Business Services, District Payroll Services, and Medi-Cal Administrative Activities Programs.
- Coordinate the review and approval process of financial and budgetary activities of all local education agencies in the county per AB 1200 guidelines.
- Direct the preparation and maintenance of reports including program cost accounting, Local Control Funding Formula (LCFF) calculation, attendance accounting, STRS/PERS, property taxes.
- Maintain current knowledge of laws, rules, and regulations related to fiscal activities.
- Compose and distribute informational bulletins to local education agencies regarding reporting requirements, changes to accounting procedures.
- Prepare and present workshops to provide current information on new or revised legislations and to provide training for the financial system software.
- Coordinate the closing of districts' books, issuance of W2s and 1099s.
- Serve as main fiscal and technical liaison to the California Department of Education, Office of Public School Construction, County Auditor/ Assessor, County Treasurer, and local education agencies.

ACALANES UNION HIGH SCHOOL DISTRICT, Lafayette, CA
A local education agency.

07/2015 - 07/2020

Director of Fiscal Services

- Supervised accounting functions such as accounts payable, accounts receivable, billing, payroll, benefits, general ledger, accounts reconciliation and analysis, budgeting, monthly/yearly cash forecasts, financial analysis, tax reporting.
- Supervised, monitored, and evaluated the assignments and performance of accounting staff.
- Led and coordinated annual budget development in collaboration with Chief Business Official.
- Calculated and projected Local Control Funding Formula (LCFF) revenue, other revenues, and expenditures of all funds.

~continued~



- Advised and counseled school site staff, district office staff, and administrators in budget requests and amendments in accordance with established procedures.
- Monitored and analyzed budget revenues, expenditures, and encumbrances to ensure adherence to established budget allocations.
- Maintained chart of accounts and prepare quarterly and annual financial statements for certification of projected solvency.
- Communicated with school site administrators, independent auditors, federal, and state agencies regarding the interpretation of legislations and regulations pertaining to school business.
- Provided consultation and training for school site and district administrative personnel to ensure understanding of fiscal processes.
- Participated in the cabinet review of board policies and administration regulations.
- Prepared special financial analyses and reports as required for collective bargaining processes.
- Represented the district at various local, regional, and state meetings.
- Served as main district liaison during independent and other financial audits.
- Developed a set of time-saving, automated Excel reports which increased the accuracy of the review of school sites' financials and streamlined the budget development process.
- Recognized by Contra Costa County Office of Education for contribution to the Contra Costa SELPA Cost Allocation Model Improvements.
- Achieved no audit findings to date.

CONTRA COSTA COUNTY OFFICE OF EDUCATION, Pleasant Hill, CA
A local education agency.

12/2011–07/2015

District Advisor

- Performed AB1200 oversight which involved a variety of specialized and technical duties such as the development, maintenance, and support of school districts' finance, budget, and accounting activities.
- Reviewed and analyzed budgets to ensure compliance with state and federal criteria and standards; make recommendations to districts as required.
- Communicated with school administrators, independent auditors, federal, and state agencies regarding the interpretation of legislations and regulations pertaining to school business.
- Prepared annual countywide financial report.
- Reconciled the districts' cash, investments, and other accounts with the County Auditor's books; research and correct discrepancies or make recommendations for adjustments as needed.
- Wrote custom reports using Excel and other software to track financial data.
- Created and updated training manuals and procedures.
- Conducted training sessions and workshops on the use of various financial software, budget development, year-end closing of books, and various pertinent school business topics.
- Developed a set of time-saving, automated Excel reports which increased the accuracy of the review of school districts' financials.
- Developed two Excel applications that automated the creation of import files that facilitated journal entries to school districts' financial systems.
- Developed an Excel application which automated the cash account reconciliation of sixteen school districts.

ALLSMILE DENTAL PRACTICE, Tracy, CA
A private family and cosmetic dentistry practice.

09/2001–11/2011

Accountant/Operations Support

- Supervised and performed accounting functions such as accounts payable, accounts receivable, payroll, general ledger, accounts reconciliation and analysis, budgeting, monthly/yearly cash forecasts, financial analysis, tax reporting.
- Prepared and reviewed financial statements and reports with certified public accounting firm.
- Performed cost/benefit analyses on purchases of materials and equipment.
- Negotiated vendor contracts, insurance contracts, and patients' financial arrangements.
- Wrote custom reports using Excel, SQL, and Access to track financials, production, patients' treatment acceptance, and continuing care.

- Provided end user training and support on use of practice management software.
- Played vital lead role in launching dental practice from scratch and growing it successfully.
- Saved full-time job salary by automating generation of electronic claims and reports.

FRITZ, A UPS COMPANY, San Francisco, CA

04/2000–09/2001

Fritz Companies was a publicly traded international logistics services company; acquired by UPS in 2001.

Auditor/Support Analyst

- Provided consultative, liaison, and support services to auditors and management in manipulation, analysis, and interpretation of data.
- Executed information security audit.
- Performed data extracts, transformations, and loads from various systems to database application for exclusive use of internal auditors.
- Performed requirements definition, data analysis, system configuration, process analysis, programming, testing, and software/hardware troubleshooting.
- Wrote technical and user documentations.
- Traveled and partnered with internal audit team and management in domestic and international locations to meet reporting/programming needs.
- Wrote, tested, and rolled-out new audit applications that significantly reduced auditors' research time.

BECHTEL GROUP INC., San Francisco, CA

07/1990–04/2000

Provides engineering, construction, and project management services.

Project Accountant/User Support Analyst

- Performed accounting functions such as client billing, accounts payable, job accounting database maintenance, monthly/yearly cash forecasts, cost auditing, accounts reconciliation and analysis, client, interentity and interoffice billing, general ledger, financial analysis and reporting.
- Set up new sets of books for new overseas projects using a PC-based accounting system.
- Audited trial balances received electronically from various international and domestic locations.
- Supervised local staff and at the same time was heavily involved in the operations of multi-currency payroll of over 1500 expatriates in an international project.
- Consulted heavily with human resources, management, and employees of diverse background regarding company policies, benefits, and payroll matters.
- Setup and trained users on Oracle General Ledger, Payables, Purchasing, Purchase Order Interface, Payroll, and custom billing system.
- Interacted effectively with internal and external auditors.
- Worked closely with field procurement group to improve the materials receiving report process.
- Consulted with senior programmers regarding testing of new releases of Oracle Financials and other custom software applications.
- Participated in testing, implementation, and operations of a pilot Oracle-based accounts payable/procurement tracking/project controls system. Bechtel eventually used this Oracle-based system in other engineering and construction projects worldwide.
- Traveled to domestic and international locations to implement 3rd-party software application that interfaced legacy procurement systems with Oracle Financials.
- Developed work process metrics to measure and improve productivity.
- Wrote ad-hoc query programs using Information Builder's Focus language and SQL that significantly reduced time spent by staff accountants on research, accounts reconciliation, and cost audit.
- Replaced 8K-page monthly invoice with electronic file version.
- Recognized by clients and received awards from project management for significant cost-savings and continuous process improvement efforts.



EDUCATION & TRAINING

Bachelor of Arts in Economics; Accounting Minor ~ University of California at Los Angeles

Certificate Courses in Fred Pryor Seminar in Supervision, California Association of School Business Officials (CASBO) Chief Business Official Boot Camp, Oracle Financials, Advanced Focus Programming, Developing Audit Command Language Applications, Medical Coding (CPT and ICD-9-CM), Dental Coding (CDT)

Professional Certificate in Client/Server Technology, UCSD - Coursework included Relational Database Engineering, Object-oriented Design and Analysis, Visual Basic, Java, LAN Architecture, Protocol, and Design

Professional Certificate in Business Computing Applications, UCSD - Coursework included Information Systems Design, Evaluation, and Management Issues, Local Area Networks, Database Management Systems, Relational Database Theory, SQL Report Writing