

CIVIL SERVICE BOARD

Three (3) vacancies with terms to 6-15-2025 and 6-15-2027, representing the following categories: 1 - Regular Member and 2 - Alternates. (*The City Manager appoints to the Civil Service Commission with Council confirmation. The City Council appoints to the Civil Service Board. Traditionally, the same members serve on the Civil Service Board and Commission. Staff is recommending the postponement of the 2 alternates for further recruitment*).

Duties

The Civil Service Board adopts, amends, and enforces a code of rules and regulations providing for appointment, employment, or suspension in all positions in the classified service based upon citizenship, character, merit, efficiency, and industry, which shall have the force and effect of law; and also rules regulating promotions, demotions, reduction in force of employees in the classified service and in what order they shall be dismissed and reinstated.

Composition

Three (3) members and two (2) alternate members shall be appointed by the Council for three-year terms or until a successor is named. The members choose their own chairman and appoint a chief examiner, not a member of the Board, who shall also act as secretary. Members must (1) be of good moral character, (2) be a U. S. Citizen, (3) be a resident of the City and have lived in the City for three years preceding appointment, (4) be over 25 years of age, and (5) not have held a public office within the preceding three years, with the exception of notary public.

Creation / Authority

City Charter Amendment Art. VII, Sec. 2(3-25-55), Ord. 12948, Ord. 17258 - 9/15/82; amended 4-3-93; Charter Amendment see Ord. 31007 - 11/21/16.

Meets

Meets third Thursday monthly, 9:00 a.m., Human Resource Conference Room, 2nd Floor, City Hall.

Member size

3

Term Length / Limit

3 years / 6 years

Liaison

Sherri Eldridge

Name	District	Term	Appt. date	End date	Appointing Authority	Position	Status	Category
Gerald Avila	District 5	2	6/12/2018	6/15/2024	City Council		Met the six-year service limitation	
Vacant		1	N/A	6/15/2016	City Council		Active	Alternate
Vacant		1	N/A	6/15/2016	City Council		Active	Alternate
Deborah A. Sibila	District 4	1	2/9/2021	6/15/2025	City Council	Chair	Active	
Raul E. Ramirez	District 5	1	6/13/2023	6/15/2026	City Council		Active	

CIVIL SERVICE BOARD

Applicants

Name	District	Status
Joshua M. Crim	District 4	Applied
Daniel Jorgensen	District 4	Applied
Jennifer L. Lehman	District 1	Applied
Silvia A. Martinez Pacheco	District 5	Applied

Profile

Joshua

First Name

M

Middle Initial

Crim

Last Name

Email Address

Street Address

Corpus Christi

City

TX

State

78418

Postal Code

Primary Phone

Alternate Phone

What district do you live in? *

☒ District 4

Current resident of the City of Corpus Christi?

☒ Yes ☐ No

If yes, how many years?

25

Owner hangsafe non-profit

Employer

Ceo

Job Title

Community development

Occupation

Work Address - Street Address and Suite Number

460 Cartagena

Work Address - City

Corpus

Work Address - State

Tx

Work Address - Zip Code

78418

Preferred Mailing Address

☒ Home/Primary Address

Which Boards would you like to apply for?

CIVIL SERVICE BOARD: Submitted

Interests & Experiences

Are you a Nueces County registered voter?

☒ Yes ☐ No

Do you currently serve on any other City board, commission or committee at this time? If so, please list:

No

Education, Professional and/or Community Activity (Present)

Neighborhood and community services for un housed

Why are you interested in serving on a City board, commission or committee?

I want to make sure the right things are done with the funds that are aquired for the services that are needed

Are you an ex-Officio member of a City Board, commission or committee?

☐ Yes ☒ No

No person shall be appointed by the Mayor or Council Members to serve on more than one board, commission, committee or corporation at the same time. If you currently serve as a voting member for a board, commission, committee or corporation are you willing to resign your current seat to serve on another board, commission, committee or corporation?

☒ Yes ☐ No

Are you a current candidate in an election for a non-city public office?

☐ Yes ☒ No

Do you currently serve as an elected official for a non-city public office?

☐ Yes ☒ No

Will you seek re-election to the non-city public office? If not in a non- city public office, please enter N/A

N/A

Demographics

Gender

☒ Male

Code of Ethics - Rules of Conduct/Conflicts of Interest

Do you represent any person or organization in any claim or lawsuit or proceeding involving the City?

☐ Yes ☒ No

Do you, your spouse, your business or your spouse's business have a City contract?

☐ Yes ☒ No

Does your employer or your spouse's employer have a City contract?

☐ Yes ☒ No

Are you involved with any activities or employment that would conflict with the official duties on the City boards for which you are applying?

☐ Yes ☒ No

Are you, your spouse, your business or your spouse's business involved in any pending bid, proposal or negotiation in connection with a contract with the City?

☐ Yes ☒ No

Do you or your spouse have a pending claim, lawsuit or proceeding against the City?

☐ Yes ☒ No

If you answer "Yes" to any of the questions above, please explain or ask to speak with the City's Legal Department. If you answer "NO" to all questions above, please enter N/A.

N/A

Board-specific questions (if applicable)

Question applies to CIVIL SERVICE COMMISSION, CIVIL SERVICE BOARD

Have you resided in the City for at least 3 years?

☒ Yes ☐ No

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Have you held public office during the past 3 years?

☐ Yes ☒ No

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Are you over 25 years of age?

☒ Yes ☐ No

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Are you a U.S. Citizen

☒ Yes ☐ No

Question applies to multiple boards

Are you willing to provide an Annual Report of Financial Information as required by the Code of Ethics?

☒ Yes ☐ No

Verification

City Code Requirement - Residency

As a board, commission, or committee member, you will be asked to adhere to City Code of Ordinances, Section 2-65, which states that all members of City boards and commissions, including ad hoc committees, appointed by the City, must be residents of the city. A move outside the city limits of the city by any member shall constitute automatic resignation from the particular board or commission on which such member served.

☒ I Agree

City Code Requirement - Attendance

As a board, commission, or committee member, you will be asked to adhere to City Code of Ordinances, Section 2-61, which provides that absences from more than 25% of regularly scheduled meetings during a term year on the part of any board, commission, or committee member shall result in an automatic termination. An absence shall be deemed unexcused unless excused by the board, commission or committee for good cause no later than its next meeting after the absence.

☒ I Agree

Consent for Release of Information

I understand that if any member of the public makes a request for information included in this application or in any attachment (e.g. resume or supporting documentation) for appointment it is subject to and must be disclosed under the Texas Public Information Act. I understand that under the Texas Public Information Act, my home address and home telephone number is subject to public disclosure unless I am elected or appointed to the position which I seek. I hereby consent to the release of my home address and home telephone number should it be requested under the Texas Public Information Act prior to my possible appointment or election. I hereby release the City of Corpus Christi, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Texas Public Information Act.

☒ I Agree

Oath

I swear that all of the statements included in my application and attached documents, if any, are true and correct.

☒ I Agree

Profile

Dr. Daniel Jorgensen

PrefixFirst NameLast Name

Email Address

Street Address

Corpus ChristiTX78418

CityStatePostal Code

Primary Phone

Alternate Phone

What district do you live in? *

☒ District 4

Current resident of the City of Corpus Christi?

☒ Yes ☐ No

If yes, how many years?

26

Texas A&M University
Corpus Christi

Full Professor

College Professor

EmployerJob TitleOccupation

Work Address - Street Address and Suite Number

6300 Ocean Drive Bay Hall 347

Work Address - City

Corpus Christi

Work Address - State

Texas

Work Address - Zip Code

78412

Work Phone

361-825-3269

Work E-mail address

daniel.jorgensen@tamucc.edu

Preferred Mailing Address

☒ Home/Primary Address

Which Boards would you like to apply for?

CIVIL SERVICE BOARD: Submitted

Interests & Experiences**Are you a Nueces County registered voter?**

☒ Yes ☐ No

Do you currently serve on any other City board, commission or committee at this time? If so, please list:

No

Education, Professional and/or Community Activity (Present)

Ph.D. in Public Administration

If you applied for multiple boards, which boards are you most interested in serving on, in order of preference? (Limit to top three)

the Merit Board and Merit Commission

Why are you interested in serving on a City board, commission or committee?

Yes

Upload a Resume

Are you an ex-Officio member of a City Board, commission or committee?

☐ Yes ☒ No

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☒ Yes ☐ No

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☐ Yes ☒ No

Dr. Daniel Jorgensen

Do you currently serve as an elected official for a non-city public office?

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Will you seek re-election to the non-city public office? If not in a non-city public office, please enter N/A

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Demographics

Gender

☒ Male

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From time to time I will be asked to do a survey for City departments. Right now, I have no contracts open with the City.

Dr. Daniel Jorgensen

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Dr. Daniel Jorgensen

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☒ I Agree

Oath

I swear that all of the statements included in my application and attached documents, if any, are true and correct.

☒ I Agree

CURRICULUM VITA

Daniel J. Jorgensen

Bay Hall 347
361-825-3269

EDUCATION

- Ph.D. Public Administration, Florida State University, Tallahassee, FL, 1999.
- M.P.A. Master of Public Administration, Drake University, Des Moines, IA, 1993.
- B.A. Business (cum laude), Loras College, Dubuque, IA, 1981.

CURRENT POSITION

Professor of Public Administration

Texas A&M University – Corpus Christi
(09/2011 – present)

ADMINISTRATIVE EXPERIENCE

Chair, Department of Social Sciences, Texas A&M University – Corpus Christi, 09/13 – 3/31/2023.

- Provide leadership for a department of 27 faculty (16 tenure track, 1 non-tenure track and 3 adjuncts); two undergraduate programs (Criminal Justice, Political Science), with approximately 500 majors, and a graduate program (Master of Public Administration, MPA), with approximately 50 majors.
- Manage a base budget of nearly \$1,500,000.
- Oversight and responsibility for three program coordinators.
- Oversight and responsibility for a full-time administrative assistant and part time support staff.
- Evaluate faculty for tenure and promotion, or promotion denials)
- Responsible for staff hiring and evaluations
- Participate in College development activities (special events with donors, alumni, and other stakeholders)
- Successes include:
 - Supporting the University goal of becoming calorized as “Research Intensive” by increasing the dollar value of contracts, grants and funded research awarded to departmental faculty by 10% from AY 2016/7 to AY 2020/21).
 - Motivating departmental faculty to increase the number of journal articles by 29% from AY 2016/17 to AY 2020/21).
 - Coordinating with faculty and administration to create an annual authentic assessment plan for the three departmental programs, including the programmatic student learning outcomes and course mapping of those outcomes.
 - Leading the self-study/external review process for all three disciplines.
 - Guiding the overhaul of departmental web presence and developed a social media presence.
 - Enlisting the help of faculty to establish departmental standards for teaching, research and service for annual faculty evaluations and the writing of a departmental code of ethics.

- Recruiting new tenure-track faculty members.
- Coordinating with local government to create a Critical Capacity Scholarship program to help government employees afford enrollment in the MPA program.

Program Coordinator, Master of Public Administration, Texas A&M University – Corpus Christi, (2006 - 2011).

- Provided leadership for an interdisciplinary graduate program with affiliated faculty from numerous disciplines including Public Administration, Political Science, Criminal Justice, Sociology, Communication, Health Care Administration and Nursing.
 - Revised and added new course offerings to meet accreditation standards for the Networked Association of Schools of Public Administration and Affairs.
 - Developed assessment materials and tracked performance of the program.
 - Established a paying internship program with local government for MPA students.
 - Scheduled course offerings working with department chairs.
 - Developed degree plans for students.
 - Created an MPA Newsletter for students, alumni and donors and an MPA social networking page.
 - Maintained largest graduate student enrollment in the College of Liberal Arts.

FACULTY EXPERIENCE

Texas A&M University Corpus Christi

Professor of Public Administration (09/2011 - Present).

Associate Professor of Public Administration (09/2006 – 08/2011).

Assistant Professor of Public Administration (08/2000 – 08/2001).

University of Central Florida

Visiting Instructor of Public Administration (08/1999 – 07/2000).

HONORS AND AWARDS

Outstanding Islander (2011).

Public Administration Educator of the Year, Coastal Bend Chapter of the American Society for Public Administration (2008).

College of Liberal Arts Outstanding Service Award (2007).

Pi Alpha Alpha National Honor Society (1993).

CONTRACTS, GRANTS, AND AWARDS

Jorgensen, Daniel J (Principal), Sponsored by City of Corpus Christi Storm Water Department, \$12,000. (06/2023 – 08/2023).

Meyer, Pamela (Principal), Araiza, Isabel (Co-Principal), Jorgensen, Daniel J (Co-Principal) Huang, Lucy (Other), "The Coastal Bend's 2016 Community Health Needs Assessment," Sponsored by Coastal Bend Health Needs Assessment Steering Committee (09/2015 – 08/2016).

Jorgensen, Daniel J (Principal), Futrell, Toby H (Supporting), "City of Corpus Christi Community Survey 2013," Sponsored by City of Corpus Christi, \$17,000.00. (11/2013 – 08/2014).

Jorgensen, Daniel J (Principal), Sponsored by City of Corpus Christi Storm Water Department, \$8,450.00. (02/2013 – 08/2013).

Jorgensen, Daniel J (Principal), "Development Services Process and Procedure Assessment," Sponsored by City of Corpus Christi Development Services Department, \$14,300.00. (01/2013 – 08/2013).

Meyer, Pamela (Principal), Araiza, Isabel (Co-Principal), Jorgensen, Daniel J (Co-Principal), "The Coastal Bend's 2013 Community Health Needs Assessment," Sponsored by Coastal Bend Health Needs Assessment Steering Committee, Other, \$60,000.00. (10/ 2012 – 08/2013).

Jorgensen, Daniel J (Principal), "Corpus Christi Community Survey," Sponsored by City of Corpus Christi, \$17,000.00. (11/2011 – 08/2012).

Mulvaney, T , Jorgensen, D. J., "Surveying the Impact of Takings Jurisprudence on Coastal Development Approvals" Sponsored by Texas Wesleyan Law School, Ft. Worth, TX and the Northern Gulf Institute, Stennis Space Center, MS. \$7,500 (10/2010 – 12/2012).

Jorgensen, Daniel J, "Environmental Strategies Survey for the Texas Department of Health and Human Services Strategic Prevention Framework State Incentive Grant (SPF-SIG)," Sponsored by Behavioral Assessment Inc., \$75,000.00. (08/2009 – 12/2010).

Meyer, Pamela (Principal), Araiza, Isabel (Co-Principal), Ramirez, Michael E. (Co-Principal), Fonseca, Diana (Supporting), Jorgensen, Daniel J (Other), "The Coastal Bend's 2010 Community Health Needs Assessment," Sponsored by Coastal Bend Health Needs Assessment Steering Committee. (10/2009 – 08/2010).

Jorgensen, Daniel J (Principal), "Corpus Christi Community Survey," Sponsored by City of Corpus Christi, \$12,000.00. (11/2008 – 08/2009).

Jorgensen, Daniel J, "Environmental Strategies Survey for the Texas Department of Health and Human Services Strategic Prevention Framework State Incentive Grant (SPF-SIG)," Sponsored by Behavioral Assessment Inc., \$65,000.00. (08/2008 – 07/2009).

Rhoades, Philip W (Co-Principal), Jorgensen, Daniel J (Co-Principal), "Bold Future Data Collection and Survey," Sponsored by Bold Future Visioning initiative, \$14,629.42. (04/2008 – 12/2008).

Rhoades, Philip W (Co-Principal), Jorgensen, Daniel J (Co-Principal), "A Study of Regional Transportation Needs," Sponsored by Coastal Bend Council of Governments, State, \$28,000.00. (02/2006 – 08/2006).

Rhoades, Philip W (Co-Principal), Jorgensen, Daniel J (Co-Principal), "Port Aransas

Ferry Survey," Sponsored by Texas Department of Transportation, State, \$15,000.00. (10/2003 – 03/2004).

Jorgensen, Daniel J (Principal), "Corpus Christi Community Survey," Sponsored by City of Corpus Christi, \$10,000.00. (11/2004 – 08/2004).

REFEREED PUBLICATIONS

Rios, J. M., Jozwiak, J. F., Jorgensen, D. J., Meyer, P. (2010). The Changing Organizational Face of Environmental Justice: From Grassroots to 502c (3) Nonprofits. *Journal of Public Management & Social Policy*, 16(2), 49-66.

Huerta, J. C., Jozwiak, J. F., Jorgensen, D. J. (2006). *Assessing the Multiple Dimensions of Student Civic Engagement*. Quick Hits for Educating Citizens.

Jorgensen, D. J., Klay, E. (2005). Technology Driven Change and Public Administration: Establishing Essential Normative Principles. *International Journal of Public Administration*, 30(3), 289-305.

Jorgensen, D.J., Cable, S. (2002). Facing the Challenges of E-Government: A Case Study of the City of Corpus Christi, Texas. *The Journal of the Society for the Advancement of Management* 67(3).

Jorgensen, D.J., Klay, E. (2001). Technological Advancement and Public Management in *Handbook of Public Management, Practice and Reform*, (ed. T. Liou), New York; Marcel Dekker.

SELECTED PRESENTATIONS

Jorgensen, D. J., "Findings from Organizational Student of the Aransas Pass Fire Department," City of Aransas Pass City Council Meeting, City of Aransas Pass, Aransas Pass, Texas. (May 19, 2014).

Jorgensen, D. J. (Presenter), "Senior Centers Benchmark Project," Leadership Committee for Senior Services, City of Corpus Christi Parks and Recreation, Corpus Christi. (January 9, 2014).

Jorgensen, D. J., "Getting ahead of the curve; utilizing assistive technology in on-line courses." Southwest Conference on Disabilities, University of New Mexico, Albuquerque, New Mexico. (October 9, 2013).

Jorgensen, D. J., "Surveying the Impact of Takings Jurisprudence on Coastal Development Approvals," Adaptive Planning for Sea-Level Rise: Legal Issues for Local Government, Harte Research Institute for Gulf of Mexico Studies, Corpus Christi, TX. (January 23, 2012).

Jorgensen, D. J., "Social Networking in Leadership Development Programs," Leadership Corpus Christi Class 39 meeting, Leadership Corpus Christi, Corpus

Christi, TX. (May 9, 2011).

Jorgensen, D. J., "Utilizing the KISS Principle in Program Evaluation," National American Evaluation Association, American Evaluation Association, San Antonio. (November 11, 2010).

SELECTED SERVICE

Department

Committee Member, MPA Committee. (September 2012 - August 2013).
Committee Chair, PADM Search Committee. (January 2011 - July 2011).
Committee Chair, Faculty Promotion and Tenure Committee (August 2008 - July 2010).

College

Committee Member, CLA Visioning Committee. (November 2013 - May 2014).
Committee Member, Graduate Council. (October 2012 - August 2013).
Committee Member, Curriculum Committee. (August 2011 - June 2013).
Committee Member, Ad Hoc Committee on Distance Education. (February 2010 - March 2012).

University

Committee Member, Academic Misconduct Review Committee. (December 2013 - August 2014).
Committee Member, Graduate Council. (October 2012 - August 2013).

Community

Harbor Bridge Project Technical Advisory Committee (TAC). (11/ 2011 – 12/2015)
City of Corpus Christi Parks and Recreation Department, Corpus Christi. (12/2013 – 08/2014).
Coastal Bend Alliance for Youth, Corpus Christi, Texas. (09/2011 – 12/2013).

Professional Memberships

American Evaluation Association
American Society of Public Administrators
Texas Association of Schools of Public Administration and Affairs

Profile

DrJenniferLLehman

PrefixFirst NameMiddle InitialLast Name

Email Address

Street Address

Corpus ChristiTX78404

CityStatePostal Code

Primary Phone

Alternate Phone

What district do you live in? *

☒ District 1

Current resident of the City of Corpus Christi?

☒ Yes ☐ No

If yes, how many years?

3

The American College of Financial ServicesProgram Director and Professor of Philanthropyeducation and philanthropy

EmployerJob TitleOccupation

Work Address - Street Address and Suite Number

1400 Ocean Dr 1003B

Work E-mail address

jennifer.lehman@theamericancollege.edu

Preferred Mailing Address

☒ Home/Primary Address

Which Boards would you like to apply for?

CIVIL SERVICE BOARD: Submitted

Interests & Experiences

Are you a Nueces County registered voter?

☒ Yes ☐ No

Do you currently serve on any other City board, commission or committee at this time? If so, please list:

No

Education, Professional and/or Community Activity (Present)

Texas Tech University, Lubbock, TX Ph.D. in Personal Financial Planning received August 2018 Dissertation Title: Three Essays on Special Donation Types Committee: Russell James, J.D., Ph.D., CFP®; Mitzi Lauderdale, J.D., CFP®; Sarah Asebedo, Ph.D., CFP®; Ann Woodyard, Ph.D. University of North Carolina, Chapel Hill, NC MPA, Institute of Government (Quantitative track) Thesis Title: Cost-Benefit Analysis of the Chapel Hill School System's Recycling and Waste Management Program (included multiple regression analysis). Juris Doctor, School of Law Texas Christian University, Fort Worth, TX BS Political Science, Philosophy, Radio-TV-Film

If you applied for multiple boards, which boards are you most interested in serving on, in order of preference? (Limit to top three)

na

Why are you interested in serving on a City board, commission or committee?

I love this city, and am looking to give back and make a difference.

Upload a Resume

Are you an ex-Officio member of a City Board, commission or committee?

☐ Yes ☒ No

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☒ Yes ☐ No

Are you a current candidate in an election for a non-city public office?

☐ Yes ☒ No

Do you currently serve as an elected official for a non-city public office?

☐ Yes ☒ No

Will you seek re-election to the non-city public office? If not in a non- city public office, please enter N/A

na

Demographics

Gender

☒ Female

Code of Ethics - Rules of Conduct/Conflicts of Interest

Do you represent any person or organization in any claim or lawsuit or proceeding involving the City?

☐ Yes ☒ No

Do you, your spouse, your business or your spouse's business have a City contract?

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na

Board-specific questions (if applicable)

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Have you resided in the City for at least 3 years?

☒ Yes ☐ No

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Have you held public office during the past 3 years?

☐ Yes ☒ No

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Are you over 25 years of age?

☒ Yes ☐ No

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☒ Yes ☐ No

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Oath

I swear that all of the statements included in my application and attached documents, if any, are true and correct.

☒ I Agree

Jennifer Lehman, Esq., CFP®; CAP®; Ph.D.
1400 Ocean Dr. 1003B, Corpus Christi, TX 78404
[REDACTED] (817) 793-6937 cell

EDUCATION, CERTIFICATIONS and LICENSURES

Texas Tech University, Lubbock, TX

Ph.D. in Personal Financial Planning received August 2018

Dissertation Title: Three Essays on Special Donation Types

Committee: Russell James, J.D., Ph.D., CFP®; Mitzi Lauderdale, J.D., CFP®; Sarah Asebedo, Ph.D., CFP®; Ann Woodyard, Ph.D.

University of North Carolina, Chapel Hill, NC

MPA, Institute of Government (*Quantitative track*)

Thesis Title: Cost-Benefit Analysis of the Chapel Hill School System's Recycling and Waste Management Program (included multiple regression analysis).

Juris Doctor, School of Law

Texas Christian University, Fort Worth, TX

BS Political Science, Philosophy, Radio-TV-Film

Bar Admissions

Admitted to state courts in Texas and North Carolina

Additional Licenses and Certifications

Wilderness First Aid (National Outdoor Leadership School)

Bloomberg Market Concepts

Certified Financial Planner™

IRB Human Subjects training (17 modules completed)

Philanthropic Solutions in Financial Planning (American Heart Assn & Financial Planning Assn)

Accredited Estate Planner (in progress)

Chartered Advisor in Philanthropy

Certified Professional Business Coach

RESEARCH INTERESTS

Philanthropy, charitable planning, estate planning law and policy, behavioral finance

TEACHING INTERESTS

Philanthropy, Trusts & Estates, Tax, Personal Finance

ACADEMIC EXPERIENCE

The American College of Financial Services

Program Director, Chartered Advisor in Philanthropy®

Wallace Chair of Learning and Professionalism in Philanthropy

Assistant Professor of Philanthropy

King of Prussia, PA (remote)

April 2022 - present

Key Accomplishments:

- Speaker and thought leader in philanthropy

- Increased program revenue by \$147,000 in 8 months
- Increased enrollment and retention while maintaining program rigor
- Developed and updated applied content for three CAP® courses in collaboration with technology and design teams; this content includes charitable giving strategies and taxes, finding your seat at the planning table, conducting multi-generational family meetings, working with a Board of Directors, different types of fundraising such as capital campaigns, annual gifts, major gifts, planned gifts
- Collaborated with data analytics team on deeper enrollment and retention tracking
- Worked with registrar and outside consultant to arrange for CLE credit for CAP® course completion (separate application for each state)
- Work with cross-functional teams
- Develop and maintain relationships with Foundation executives across the U.S.
- Create content three times per year for *Planned Giving Today*
- Travel throughout the country to meet with Foundations, study groups, estate planning attorneys, CPAs, financial planners, and fundraisers to market the CAP® program and enhance their American College experience
- Develop and maintain relationships with 31 study group peer mentors

Texas A&M – Corpus Christi
Director of Planned Giving

Corpus Christi, TX
June 2021 – March 2022

Key Accomplishments:

- Increased outreach to planned giving prospects
- Incorporated planned giving into a capital campaign
- Increased presence in the community
- Increased stewardship to Heritage Society members
- Increased planned giving education for advancement team members
- Taught MBA Investments course
- Left for an unsolicited job offer with a 40% pay increase

George Fox University
Assistant Professor of Financial Planning
Digital Liaison, College of Business

Newberg, OR
August 2019 – August 2021
Fall 2020

Courses Taught:

- Personal Finance (face to face, hybrid and online via Moodle)
- Business Law (face to face, hybrid and online)
- Estate Planning (face to face and online)
- Retirement Planning (face to face)
- Capstone (face to face)

University of Utah
Visiting Assistant Professor

Salt Lake City, UT
July 2018 – June 2019

Courses Taught:

- Financial Fitness for Life (face to face and online)
- Wealth and Risk Management (face to face)
- Careers in Financial Planning (online)
- Capstone (developed and taught online via Canvas)

Western Carolina University
Adjunct Professor of Estate Planning

Cullowhee, NC (remote)
August 2018 - present

Courses Taught:

- Estate Planning (developed and taught online via Blackboard and Canvas)

- Investment Planning (developed and taught online via Blackboard and Canvas)

College for Financial Planning
Estate Planning Adjunct Instructor

Centennial, CO (remote)
Jan. 2018 – present

Courses Taught:

- Estate Planning (live remote, online, and CFP® exam live review)

Texas Tech University
Graduate Part-Time Instructor

Lubbock, TX
August 2014 – August 2018

Courses Taught:

- Estate Planning (face to face and online, developed online and hybrid versions via Blackboard)
- Online sections of PFP 3381: Investments
- Online and face-to-face sections of PFP 4101: Finding Your First Job
- Guest lecture on Consumer Credit/Legal Processes for PFI 3321 face-to-face sections

Texas Tech University Financial Planning Academy
Part-Time Advisor

Lubbock, TX
Summer 2018

Wharton County Junior College
Economics Instructor

Wharton, TX (Houston Metro)
2010 to 2014

Key Accomplishments:

- Recognized for teaching excellence as an instructor for macroeconomics and microeconomics courses. Course technologies include Blackboard and broadcast TV.
- Recognized evaluator for new educational technology and e-books.

William S. Boyd School of Law
Director of Law School Career Services

Las Vegas, NV
2004 to 2005

Key Accomplishments:

- Developed employment pipeline by cultivating professional relationships with law firms, government agencies, courts, non-profits and other potential employers.
- Motivated a three-fold increase in student visits to Career Services.
- Increased the level of student, staff and faculty satisfaction with Career Services. Spoke regularly at career seminars for students and alumni.
- Jointly researched, with Yale Law School's Career Services, ways to improve the public sector salary survey conducted by the National Association for Law Placement. Co-presented findings to NALP.

Texas Wesleyan School of Law (now Texas A&M)
Assistant Director of Career Services and Alumni Relations

Fort Worth, TX
2003 to 2004

Houston Community College
Economics and Legal Research Instructor

Houston, TX
2010

Other Teaching Experience

ESL instructor for Berlitz Language Center; St. John's Episcopal school;
Tarrant County College; and Hill College.

2006-2009

PUBLICATIONS AND CONFERENCE PRESENTATIONS

Lehman, J.L. (Forthcoming). Planned Giving With an Impact. *Planned Giving Today*.

Lehman, J.L. (Forthcoming May 2024). Research Highlights and How to Apply to Your Practice. Chicago Planned Giving Council, Chicago, IL.

Lehman, J.L., Henderson, R., Sunder, A (2024). Clock-Out: What Explains “Quiet Quitting” in Financial Services? Submitted to *Financial Planning Review*.

Lehman, J.L., Henderson, R., Sunder, A (2023). Clock-Out: What Explains “Quiet Quitting” in Financial Services? *Consumer Interests Annual* 69.

<https://www.consumerinterests.org/assets/docs/CIA/CIA2023/HendersonRebeccaCIA2023.pdf>

Lehman, J.L. (March 2024). Philanthropy Research Highlights and How This Supports DEI. CASE Drive, Washington, D.C.

Lehman, J.L. (Feb. 2024). Connecting with donors through philanthropic best practices. Crescendo webinar, virtual.

Lehman, J.L. (Feb. 2024). Planned Giving: Fun with Taxes and Probate. FPA DFW, Irving, TX.

Lehman, J.L. (Jan. 2024). Why include charity in your estate plan? Corpus Christi Estate Planning Council, Corpus Christi, TX.

Lehman, J.L. (Oct. 2023). Building a profitable & purpose-driven business. Investment News Advisor Insights, virtual.

Lehman, J.L. (Sept. 2023). Connecting with donors through philanthropic best practices. Crescendo's Practical Planned Giving conference, Orlando, FL.

Lehman, J.L. (Aug. 2023). Basics of Planned Giving. AFP Coastal Bend, Corpus Christi, TX.

Lehman, J.L. (June 2023). Highlights of CAP® and how my Research Applies to Your Practice. Wilmington, DE Tax Group.

Lehman, J.L. & Henderson, R. (May 2023). Quiet Quitting in Financial Services presented at ACCI, Las Vegas, NV.

Lehman, J.L. (May 2023) Tax Implications of Charitable Giving Strategies to Philadelphia Planned Giving Council.

Lehman, J.L. (April 2023). Highlights of CAP® and charitable bequest importance among donors to different charity types presented at the Arizona Community Foundation, Phoenix, AZ.

Lehman, J.L. (Jan. 2023). Fundamentals of Fundraising. All day training presented at Bay Jewel Event Center on behalf of Coastal Bend Community Foundation, Corpus Christi, TX.

Lehman, J.L. & Bristol, J (Dec. 2022). How to Incorporate DEI Into Planned Giving and Why It Matters. *Planned Giving Today* 33(12).

Lehman, J.L., Henderson, R., Sunder, A (2022). Work-Life Balance and Burnout in Financial Planning Profession. *Financial Planning Review* 5.2-3: e1145.

Lehman, J.L. (2022). *Highlights of my Research and How it Applies to Your Practice*. Lone Star CGP Keynote speech

Lehman, J.L. (2021, March). [Review of the book *The Deficit Myth*, by S. Kelton]. *NAPFA Advisor* 18, 21.

Lehman, J.L. (2021). Consumption Capital and Distinctive Characteristics of Donors to Education. *Journal of Philanthropy & Education* 4(2), 1-24.

Lehman, J.L. & James, Russell (2019). Charitable Estate Planning among Donors to Different Types of Charities. *International Review on Public and Nonprofit Marketing* 25(2), e1657. DOI: 10.1002/nvsm.1657

Lehman, J.L. & James, Russell (2018). The charitable bequest gap among African-Americans: Exploring charitable, religious, and family estate planning attitudes. *Journal of Personal Finance* 17(1).

Lehman, J.L. (2018). Three Essays on Special Donation Types. <https://ttu-ir.tdl.org/handle/2346/74508>

Lehman, J.L. (2018). Using Family Education as a Tool for Raising Ethical and Financially Responsible Children. *Journal of the Texas Tech University Ethics Center* 2 (1).

Lehman, J.L. (2021). https://wallethub.com/edu/best-and-worst-states-to-retire/18592#expert=Jennifer_Lehman

Lehman, J.L. (2020). Charitable Giving in a Time of Turmoil. *1st Presbyterian Church Newberg Pew News*.

Lehman, J.L. (2020). https://wallethub.com/credit-cards/bad-credit-student/#expert=Jennifer_Lehman

Lehman, J.L. (October 2019). *Work Life Balance and Burnout Among Women in Financial Planning*. Paper presented at the 2019 Academy for Financial Services annual conference, Minneapolis, MN.

Lehman, J.L. (October 2018). *What is it Really Like to be a Financial Planner?* Keynote speech presented at the 2018 Salt Lake Community College Finance Symposium, Salt Lake City, UT.

Lehman, J.L. (October 2018). *Charitable Estate Planning among Donors to Different Types of Charities*. Paper presented at the 2018 Academy for Financial Services annual conference, Chicago, IL.

Lehman, J.L. (March 2018). *Charitable Estate Planning among Donors to Different Types of Charities*. Paper presented at the 2018 Southwest Finance Assn conference, Albuquerque, NM.

Lehman, J.L. (Feb. 2018). *Charitable, Religious, and Family Estate Planning Attitudes among African-Americans*. Paper presented at the 2018 CFP® Board Academic Research Colloquium, Arlington, VA.

Lehman, J.L. (Nov. 2017). *Charitable Bequest Attitudes among Minorities, and Implications for Financial Planners*. Paper presented at the 2017 Association for Financial Counseling & Planning Education Annual Conference, San Diego, CA.

Lehman, J.L. (Oct. 2017). *Diversity Issues in Charitable Estate Planning*. Paper presented at the 2017 Texas Tech University Three Minute Thesis, Lubbock, TX.

Lehman, J.L. (Oct. 2017). *Using Family Education as a Tool for Raising Ethical and Financially Responsible Children*. Paper presented at the 2017 Texas Tech Global Ethics Day (winning student paper), Lubbock, TX.

Lehman, J.L. (Oct. 2017). *Diversity Issues in Charitable Bequest Attitudes*. Paper presented at the 2017 Financial Management Association Doctoral Symposium, Boston, MA.

Lehman, J.L. (Oct. 2017). *Diversity Issues in Charitable Bequest Attitudes*. Paper presented at the 2017 Academy of Financial Services Annual Conference, Nashville, TN.

Lehman, J.L., (April 2017). *Consumer Attitudes Regarding End of Life Charitable Planning*. Paper presented at the 2017 American Council on Consumer Interests Annual Conference, Albuquerque, NM.

Lehman, J.L. (Feb. 2017). *Consumer Attitudes Regarding End of Life Charitable Planning*. Paper presented at the 2017 Texas Tech Opportunity Days Research Symposium.

OTHER PRESENTATIONS

Lehman, J.L. <i>Introduction to the CAP® program and how to succeed</i> to Boston study group	2024
Lehman, J.L. <i>Best practices for running a CAP® study group</i> to Cincinnati study group	2024
Lehman, J.L. <i>Introduction to the CAP® program and how to succeed</i> to Jewish Fed'n study group	2023
Lehman, J.L. <i>Introduction to the CAP® program and how to succeed</i> to Memphis study group	2023
Lehman, J.L. <i>Introduction to the CAP® program and how to succeed</i> to Mid-Atlantic study group	2023
Lehman, J.L. <i>CAP® program update</i> to Central Florida CAP® study group	2023
Lehman, J.L. <i>Mystery Guest</i> at Seventh Day Adventist Planned Giving and Trust Services conf.	2023
Lehman, J.L. <i>Roundtable discussion leader on philanthropy motivations</i> at PPI Rendezvous	2023
Lehman, J.L. <i>Best practices for running a CAP® study group</i> to Oklahoma City Comm. Foundation	2023
Lehman, J.L. <i>Best practices for running a CAP® study group</i> to Tulsa Community Foundation	2023
Lehman, J.L. <i>Best practices for running a CAP® study group</i> to Madison Community Foundation	2022
Lehman, J.L. <i>How to start a CAP® study group</i> to Chesapeake Planned Giving Council	2022
Lehman, J.L. <i>How to advance your career through CAP®</i> to Delaware/Greater Philadelphia CAP® study group	2022
Lehman, J.L. <i>My vision for CAP®</i> to Central Florida CAP® study group	2022
Lehman, J.L. <i>How to advance your career through CAP®</i> to Central Iowa AFP	2022
Lehman, J.L. <i>How to advance your career through CAP®</i> to USA 500 Nonprofit Roundtable	2022

WORKING PAPERS

Lehman, J.L. & Scarince, C. <i>The influence of charity website design on donation button clicks.</i>	
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SCHOLARLY SERVICE

Planned Giving Today article writer	
CAP® Scholarship Committee Chair	
National Association of Personal Financial Advisors (NAPFA) West Region study group presenter	2020
International Journal of Nonprofit and Voluntary Sector Marketing reviewer	2020
Oxford University Press reviewer	2019
Journal of Consumer Affairs reviewer	2019

PROFESSIONAL SERVICE

Chair of two Program Director Search Committees	2022
Academic Policy and Grievance Committee, TAC	2022
National Association of Personal Financial Advisors (NAPFA) West Region study group presenter	2020
Charitable Giving in a Time of Turmoil, published in 1 st Presbyterian Church Newberg Pew News	2020
Wallet Hub https://wallethub.com/credit-cards/bad-credit-student/#expert=Jennifer_Lehman	2020
International Journal of Nonprofit and Voluntary Sector Marketing reviewer	2020
Oxford University Press reviewer	2019
Journal of Consumer Affairs reviewer	2018
West Texas FPA Pro Bono Chair	2015-2018
ACCI conference Co-Moderator	April 2017
Mother Daughter Money Games Event Volunteer	Nov 2015
FPA Financial Planning Day Volunteer	2014 - 2016
Chair of the economics track at the annual conference for Texas Community College	2012-2014
Teachers Association (TCCTA)	
Elections Committee chair, TCCTA	2012-2014

UNIVERSITY SERVICE

General Education committee, George Fox University	Fall 2020 – Summer 2021
Pre-Law Advisor, George Fox University	Fall 2020 – Summer 2021
<i>Business Brief</i> editor	Spring 2020 - Summer 2021
Ping Pong Club faculty sponsor, George Fox University	Fall 2019 - Summer 2021
Future Financial Planners Association faculty sponsor, University of Utah	Fall 2018-Summer 2019
Financial Planning Program Director (Interim)	Fall 2018-Summer 2019

Red to Black Level IV Peer Financial Counselor, Texas Tech University	2016-2018
Undergraduate Poster Competition Volunteer Judge, Texas Tech University	March 2016
Mock Trial Coach, Texas Tech University	Oct 2015-Feb 2016
Arts and Humanities Graduate Research Conference Volunteer Moderator	Oct 2015
Opportunity Days casino night volunteer, Texas Tech University	2015 - 2017
Majors/Minors Fair PFI program representative, Texas Tech University	2015 - 2017
Piggy Bank decorating event for incoming freshman, PFI program representative, TTU	2014 & 2015
Best in Class judge, National Economic Teaching Assn	2014
Faculty Council, Wharton County Junior College	2012-2014
Technology Committee, Wharton County Junior College	2013-2014
Financial Aid Committee, Wharton County Junior College	2011-2014
Career Services Committee Chair, William S. Boyd School of Law	2004-2005

STIPENDS, GRANTS AND AWARDS

FPA DFW speaker stipend	Feb 2024
<i>Corpus Christi Estate Planning Council speaker stipend</i>	Jan 2024
Crescendo PPGC speaker stipend	Fall 2023
Coastal Bend AFP speaker stipend	Summer 2023
Coastal Bend Community Foundation speaker stipend	Spring 2023
Northwest Planned Giving Roundtable Scholarship	Fall 2020
Red to Black volunteer recognition and outstanding counselor award	Spring 2018
TTU Ethics Symposium Student Paper Winner	Fall 2017
AFCPE Student Scholarship	Fall 2017
FMA Doctoral Symposium	Fall 2017
ACCI Student Travel Scholarship	April 2017
Financial Women in Texas Scholarship	Fall 2016
FPA Leadership Conference sponsorship from FPA Pro Bono Foundation	Nov. 2015
Helen DeVitt Jones Graduate Fellowship, Texas Tech University	2014-2016
Teaching Assistantship, Texas Tech University	2014-2018
"Right on the Money" award from PFI program directors for service to the PFI program (received twice)	June and August 2015
Award of Excellence from PFI program directors for student engagement	Feb. 2016
Research Assistantship, University of North Carolina at Chapel Hill	
Phi Beta Kappa, Texas Christian University	
Summa Cum Laude, Texas Christian University	
Academic Scholarship, Texas Christian University	

PROFESSIONAL MEMBERSHIPS

National Association of Charitable Gift Planners (NACGP)
Association of Fundraising Professionals (AFP), Coastal Bend chapter
Purposeful Planning Institute (PPI)
Advisors in Philanthropy (AiP)
Corpus Christi Estate Planning Council
Council for Advancement & Support of Education (CASE)
Financial Management Association (FMA)
Financial Planning Association (FPA)
American Council on Consumer Interests (ACCI)
National Association of Personal Financial Advisors (NAPFA)
American Economic Association (AEA)
Academy of Financial Services (AFS)

Profile

Silvia

First Name

A

Middle Initial

Martinez Pacheco

Last Name

Email Address

Street Address

Corpus Christi

City

TX

State

78414

Postal Code

Primary Phone

Alternate Phone

What district do you live in? *

☒ District 5

Current resident of the City of Corpus Christi?

☒ Yes ☐ No

If yes, how many years?

54

National Migrant and Seasonal Head Start Association

Employer

Finance Resource Officer

Job Title

Financial

Occupation

Work Address - Street Address and Suite Number

3401 Sterling Drive

Work Address - City

Corpus Christi

Work Address - State

Texas

Work Address - Zip Code

78414

Work Phone

3615496343

Work E-mail address

silvia@nmshsa.org

Preferred Mailing Address

☒ Home/Primary Address

Which Boards would you like to apply for?

CIVIL SERVICE BOARD: Submitted

Interests & Experiences

Are you a Nueces County registered voter?

☒ Yes ☐ No

Do you currently serve on any other City board, commission or committee at this time? If so, please list:

No

Education, Professional and/or Community Activity (Present)

Board member for COADA (Council on Alcohol & Drug Abuse, Rotary Club of Southside, Auxiliary for Blessed Sacrament, Westside Business Association, Hispanic Women's Network, Instituto Cultura Hispanica, CC Chamber Ambassador,

If you applied for multiple boards, which boards are you most interested in serving on, in order of preference? (Limit to top three)

N/A

Why are you interested in serving on a City board, commission or committee?

Since retiring and at my age, i feel i have a lot to offer with my background as a army civilian supervisor, skillsets that i learned and are invaluable to me, it would be my honor to share those as a member of the civil service board. i am well rounded and live by high morals and ethics and hope to bring a wealth of knowledge to the table.

Upload a Resume

Are you an ex-Officio member of a City Board, commission or committee?

☐ Yes ☒ No

No person shall be appointed by the Mayor or Council Members to serve on more than one board, commission, committee or corporation at the same time. If you currently serve as a voting member for a board, commission, committee or corporation are you willing to resign your current seat to serve on another board, commission, committee or corporation?

☒ Yes ☐ No

Silvia A Martinez Pacheco

Are you a current candidate in an election for a non-city public office?

☐ Yes ☒ No

Do you currently serve as an elected official for a non-city public office?

☐ Yes ☒ No

Will you seek re-election to the non-city public office? If not in a non-city public office, please enter N/A

N/A

Demographics

Gender

☒ Female

Code of Ethics - Rules of Conduct/Conflicts of Interest

Do you represent any person or organization in any claim or lawsuit or proceeding involving the City?

☐ Yes ☒ No

Do you, your spouse, your business or your spouse's business have a City contract?

☐ Yes ☒ No

Does your employer or your spouse's employer have a City contract?

☐ Yes ☒ No

Are you involved with any activities or employment that would conflict with the official duties on the City boards for which you are applying?

☐ Yes ☒ No

Are you, your spouse, your business or your spouse's business involved in any pending bid, proposal or negotiation in connection with a contract with the City?

☐ Yes ☒ No

Do you or your spouse have a pending claim, lawsuit or proceeding against the City?

☐ Yes ☒ No

If you answer "Yes" to any of the questions above, please explain or ask to speak with the City's Legal Department. If you answer "NO" to all questions above, please enter N/A.

N/A

Board-specific questions (if applicable)

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Have you resided in the City for at least 3 years?

☒ Yes ☐ No

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Have you held public office during the past 3 years?

☐ Yes ☒ No

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Are you over 25 years of age?

☒ Yes ☐ No

Question applies to CIVIL SERVICE COMMISSION,CIVIL SERVICE BOARD

Are you a U.S. Citizen

☒ Yes ☐ No

Question applies to multiple boards

Are you willing to provide an Annual Report of Financial Information as required by the Code of Ethics?

☒ Yes ☐ No

Verification**City Code Requirement - Residency**

As a board, commission, or committee member, you will be asked to adhere to City Code of Ordinances, Section 2-65, which states that all members of City boards and commissions, including ad hoc committees, appointed by the City, must be residents of the city. A move outside the city limits of the city by any member shall constitute automatic resignation from the particular board or commission on which such member served.

☒ I Agree

City Code Requirement - Attendance

As a board, commission, or committee member, you will be asked to adhere to City Code of Ordinances, Section 2-61, which provides that absences from more than 25% of regularly scheduled meetings during a term year on the part of any board, commission, or committee member shall result in an automatic termination. An absence shall be deemed unexcused unless excused by the board, commission or committee for good cause no later than its next meeting after the absence.

☒ I Agree

Consent for Release of Information

I understand that if any member of the public makes a request for information included in this application or in any attachment (e.g. resume or supporting documentation) for appointment it is subject to and must be disclosed under the Texas Public Information Act. I understand that under the Texas Public Information Act, my home address and home telephone number is subject to public disclosure unless I am elected or appointed to the position which I seek. I hereby consent to the release of my home address and home telephone number should it be requested under the Texas Public Information Act prior to my possible appointment or election. I hereby release the City of Corpus Christi, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Texas Public Information Act.

☒ I Agree

Oath

I swear that all of the statements included in my application and attached documents, if any, are true and correct.

☒ I Agree

Silvia A Martinez Pacheco

Silvia Martinez-Pacheco

Retired Civil Servant and Finance Resource Officer

Contact

361-549-6343



silvia@nmshsa.org

Profile

Finance Resource Officer with the National Migrant and Seasonal Head Start Association (NMSHSA) non-profit, which is based in Washington, D.C.; I am able to work remotely and travel to headquarters as required to provide financial oversight of a \$61million dollar grant awarded by the USDA for the farmworkers of America. I have utilized my 36 years of experience in Acquisition, Budget, and Contracts that I acquired as Chief of Information Technologies for the Department of Defense, Corpus Christi Army Depot in performing the duties and responsibilities as a Finance Resource Officer and Human Resource Officer.

Finance Resource Officer – NMSHSA

2022 – Current

- Duties include grant fiduciary administration in compliance with the grant award, budgeting, disbursements, financial governance and audit, and accountability and financial integrity reporting to all federal entities such as the IRS, USDA, and SAM.gov.
- I comply with federal regulations and financial policies for the essential management of the federal award.
- I participate in the annual audit and assist the CPA, I perform bank reconciliations and financial reports monthly.
- I am also the Human Resource Officer and prepare and process payroll bi-weekly, onboard new hires as well as separation of employees. I generate annual performance appraisals for employees based on supervisor input and organized evaluation meetings to review.

Finance Resource Officer – United CC Chamber of Commerce

2017-2019

- Executed Human Resource duties such as payroll, new employee hiring and termination of employees, performance appraisals, timekeeping, 401k and insurance facilitation, and abundance of annual training requirements for employees.
- I carried out financial duties such as payments to chamber vendors, accounts receivable for table sponsorships and tickets to a number of annual chamber events, created and executed

budgets for each event, received annual membership payments, recorded in both Chamber Master software program and QuickBooks and deposited accordingly.

- Printed and mailed out annual membership invoices and/or sponsorships.
- Engaged in annual audit with the accounting firm and monthly bank reconciliations with the CPA.
- Attended social events, ribbon cuttings, meetings and workshops as required.
- Provided budget input and oversight to Board of Directors as well as Executive Committee.

Chief of Information Technology (IT) Acquisitions, Budget and Contracts – Corpus Christi Army Depot

1979-2015

- Managed a \$26 million dollar budget for IT procurements for Depot Maintenance and Base Operation Costs. Provided input and prepared budget policies as required.
- Followed and enforced regulatory guidance Army Regulation 25-1 in establishing policies and assigning responsibilities for IT management and Information Technology.
- Improved data accuracy, financial oversight, to ensure effective stewardship and audit readiness.
- Administered financial control over the execution of IT purchases and annual budget to ensure approved expenditures are within assigned spending authority.
- Reviewed and authorized over 450 yearly credit card purchase requests for validity, cost, pertinence and budgetary guidelines.
- I administered, managed and provided oversight for 50 annual renewable contracts and one-time procurements that included IT equipment purchases, equipment maintenance support, industrial automation equipment, personnel contract support, networking, and hardware and software support.
- Oversight of the team procurements to ensure fiscal responsibility by staying on budget and within set deadline.
- Contracting Officer Representative (COR) for 4 service contracts with over 26 contractors, monitored contractor performance using quality assurance surveillance plans (QASP), performed on site weekly walk throughs of work sites, attended staff meetings, and executed on the spot resolutions for inefficiencies or problems needing immediate attention.
- Developed Performance Work Statements for new service contracts and modified PWS as appropriate.
- Worked closely with EEO and MER specialists to ensure proper policies and procedures are followed by all employees under my supervision. Validated that personnel completed their annual EEO training and were aware of their rights and provided them with EEO resources when necessary.
- Ensured employee and self-development through available Army and DOD training resources.

- Partake in an annual supervisor developmental training course and maintain and obtain a required qualification/certification for DOD Acquisition Career Development Program in accordance with DOD guidelines.
- Developed an Individual Development Plan (IDP) for all employees under my supervision and revised if needed.
- Performed annual appraisals to employees applying duties and scope set in employee position description.
- Adhered and utilized the Army Standards of Conduct for civilians, consulted and abided by the AFGE union book in supervision of employees as well as misconduct or disciplinary actions brought against or by the employee.
- Followed the chain of command with adherence to discretion and confidentiality for any allegations of misconduct, disciplinary action, grievances, whistleblower protection and/or reprisals. Worked following the Army Code of Ethics as a guide not only as an employee but foremost as a supervisor.
- Participated in many selection panels for promotions, new hires or transfers; also engaged as a panelist in Alternative Dispute Resolutions which included disciplinary actions, grievance hearings, wrongful termination, retaliation, discrimination, harassment and ageism. These panels would also include the Judge Advocate General (JAG), Inspector General (IG) and Depot attorney as needed.

SKILLS

Disciplined Work Ethic
 Strategic and Critical Thinking
 Effective Communication in conflict resolution
 Bilingual
 Strong judgement in making sound decisions
 People person

Education

Defense Acquisition University 2015	Department of Defense 2015	Department of Defense 2015
IT Level II Certification Professional	Contracting Officer Representative	Supervisory
Department of Defense 2015	Department of Defense 2015	Department of Defense 2015
Ethics and EEO certification Force Protection	Workplace Violence and Sexual Harassment	Anti-Terrorism
Roy Miller High School 1980		
High School Diploma		