

[Type text] PAB Academy of Finance
Advisory Board Meeting Minutes
February 10, 2015
PHS Career Center

In Attendance: Tom Fiormonti, Michele Halopoff, George Martinez, Brad Rohrbach, Julie White, Kate Brackley, Gordon Young, Jose Valdez, Salma Aziz, Bill Kunelis, Teresa Zamarripa, Jessica Flores, Dustin Della, Maria Garcia, Jan McKinley, Mimi Schuler, Ruben Alvarez, Daisy Ambriz (student presenter).

1. Brad Rohrbach opened meeting at 4:05 PM, and welcomed everyone, and thanked everyone for coming. He asked that everyone introduce themselves.
2. Review and Approval of Agenda:
Motion: Jan McKinley, Second: George Martinez, ALL IN FAVOR.
3. Review and Approval of Minutes from January 13, 2015:
Motion: Tom Fiormonti, Second: Jan McKinley, ALL IN FAVOR.
4. PAB Student Report: Daisy Ambriz (senior) – speaking partner could not attend.
 - a. Mock Interviews – great experience; nice having a second interview; very helpful
 - i. Thanked board members on behalf of seniors for support and participation in interviews
 - b. Money Smart – 4 modules: Borrowing, Budgeting, Credit Cards, Debt/Income Ratio
 - i. Thanked Mr. Rogal and Mr. Young on behalf of seniors for their time presenting Money Smart.
5. Academy Director's Report – Michele Halopoff:
 - a. Senior Mock Interviews:
 - i. Senior Mock Interview workshop led by Debbie Prescott.
 - ii. Senior Mock Interviews were very successful.
 - iii. Interviewers were very impressed.
 - iv. Seniors found this second interview very useful.
 - b. Junior Mock Interviews – scheduled for Wednesday and Thursday, February 18th & 19th.
 - i. Michele mentioned that the Pathways Office is in charge of this. We have reserved the LMC, but they will arrange everything else.
 - ii. Interview training workshop by CSET (Mr. Haskins) was on Feb. 5, 2015
 - c. PAB Website: <https://sites.google.com/a/portervilleschools.org/pab/>
 - i. Retail sales students have been working on website
 - ii. Students are asking, and would be very appreciative, if board members could give feedback: advice, tips, suggestions, etc. about website.
6. Financial Institution progress:
 - i. Brad Rohrbach said that we have received the signed Letter of Intent from Philip Clarey, Executive Officer TCFCU
 - ii. The Memorandum of Understanding (MOU) is the next step to coordinate.
 1. Note: Mr. Pickett will work on this – he was not present at this meeting
 - iii. Michele inquired about properly notifying Bank of Sierra
 1. Brad said that a draft letter to Bank of Sierra will be written, and that we will make sure that Bank of Sierra has the opportunity to participate with PAB.
 2. Jan McKinley asked if we should meet with Bank of Sierra
 3. Brad will have Raul let him know when we can meet with Bank of Sierra.
7. Mentor Conference on April 17, 2015 (3rd Annual)

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- a. Ruben Alvarez showed a video from last year's conference, and said that they need community partners to be:
 - i. Speakers – will talk about hiring process and maintaining a job.
 - ii. Panel members – will talk about their personal education/work/interview experiences, and students can ask them questions.
 - b. Mimi Schuler mentioned that Advisory Board is welcome to come for lunch (Noon) and sit/network with students.
 - c. Ruben mentioned that there are seven business workshops and six workshops addressing the hiring process and workplace effectiveness, that for many students, this will be the first time for them to be in a room with all professionals, and could be very valuable.
 - d. Ruben handed out a rubric of the different workshops (attached), and asked for help from board members.
 - e. PAB Advisory Board members who volunteered to present:
 - i. Maria Garcia to present
 - ii. Dustin Della – maybe to present
 - iii. Gordon Young – as panel member
 - f. PAB Graduates who may like to present:
 - i. David Rodriguez (2014 PAB Graduate) would like to present, per Michele
 - ii. Israel (Izzy) Irizarry may be interested in speaking, per Michele
 - iii. Selena Vendejas (PAB Graduate) may be interested in speaking, per Tom
 1. Note: Michele Halopoff and Tom Fiormonti will be in touch with these former students, and will Ruben and Mimi know if they will participate.
 - iv. Brad mentioned that Selena will be working in the Pathways Office during Spring Break as an intern.
 - g. Brad asked if Ruben could provide samples of previous internships.
 - h. Mimi said that job shadowing is a great experience for students if they can't commit to a longer internship.
8. Nomination for Advisory board Vice-Chair
- a. No one spoke up – will visit at another meeting
9. Nomination for Chair of Marketing and Partnership Committee
- a. No one spoke up – will visit at another meeting
10. Subcommittee Reports
- a. Curriculum & Evaluation:
 - i. Jan and Brad said that they want to work on Financial Literacy to coincide with the Financial Institution on Campus.
 - ii. Brad mentioned finding Common Core financial literacy program to support students and lead the charge.
 - b. Marketing & Partnership:
 - i. Dustin said that he and Debbie Prescott have been working on arranging with service clubs for students to present.
 1. Dustin mentioned that the three students who presented at Lions Club (Maria Torres, Jessica Flores, and Lori Lemus) did a great job, and that the members were very impressed and inquisitive about their PAB experiences.

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- c. Internship & Scholarship:
 - 1. Michele mentioned that the same students (Maria, Jessica, and Lori) presented at the Zonta Club meeting, and received a very positive response.
 - a. Two members volunteered to interview
 - 2. Jan McKinley mentioned that Thank You letters should be written to interviewers from the Advisory Board – maybe from Debbie Prescott as secretary. Letter could be evidence as community partnership.
 - a. Michele mentioned that the seniors are writing thank you letters to each of their interviewers, and that we will mail them out to them.
11. Upcoming events:
- a. Mock Interviews – already addressed in Director’s Report
 - b. Mentors Conference – April 17, 2015 at the Nazarene Church on Olive Avenue.
 - NOT ON AGENDA: Brad asked if anyone wanted to break out into committee meetings
 - i. No one wanted to at this time.
 - Next meeting: March 10, 2015 in the PHS Career Center.
 - Meeting adjourned at 4:48 PM.