



YPI CHARTER SCHOOLS

February 6, 2023

TO: YPI Charter Schools
Board of Directors

FROM: Ruben Duenas
Chief Operations Officer/ Interim High School EA

SUBJECT: Recommendation to approve the following card holder changes to the CCU school credit cards.

BACKGROUND

Every year as staffing changes, YPICS issues, closes and re-evaluates the need for school credit card holders. The following positions are positions which receive credit cards associated with specific amounts.

Position	Credit Card Limit
Executive Director (ED)	\$5,000
Chief Operations Officer (COO)	\$5,000
Director of Technology	\$1,000
Senior Director of Community Schools	\$3,000
Executive Administrator (EA)	\$5,000
HS Assistant Executive Administrator (AEA)	\$3,000
Operations Lead	\$1,000

ANALYSIS

With the COO currently being the Interim EA, his credit card is now being utilized for high school purchases in addition to YPICS purchases. The COO's credit card is maxed out regularly.

There is now a need for the high school AEA to have an increased limit on her credit card and the high school operations lead to have a credit card to be in alignment with the credit card structure.

Proposed Updates/ Changes

Position	Employee Name	Change
High School AEA	Yolanda Fuentes	Increase limit to \$5,000
High School Operations Lead	Isis Pena	Open and add limit of \$1,000
Former High School EA	Lorence Simonsen	Close out

RECOMMENDATION

It is recommended that the Board of Directors approve closing Lorence Simonsen’s (former HS EA) credit card, increasing the max limit of Yolanda Fuentes’ (HS AEA) card to \$5,000 and opening a credit card for the high school’s operations lead, Isis Pena with a card limit of \$1,000.