



THE SCHOOL DISTRICT OF PALM BEACH COUNTY
PURCHASING DEPARTMENT
**Amendment to Consultant/Service Provider
Memorandum of Agreement**

Amendment Number 1

Date of Amendment 04/12/07

Consultant/Service Provider A L Jackson and Company, PA

This Amendment Agreement by and between a duly authorized representative of The School District of Palm Beach County, Florida, (hereinafter referred to as the District) and the above named Consultant/Service Provider (hereinafter referred to as the Consultant/Service Provider) stipulates the changes to the original Consultant/Service Provider Memorandum of Agreement

CHANGES MADE TO THE AGREEMENT ARE AS FOLLOWS

The Consultant Agreement between the School District of Palm Beach County and A L Jackson and Company, PA needs amending due to a change in staffing. A L Jackson and Company, PA had provided the School District with a consultant to provide 8.9 PeopleSoft Functional Support in Budget and Commitment Control at \$160.00 per hour. The District realizes that it needs a consultant with a higher level of expertise with this support and A L Jackson and Company, PA has provided us with a replacement, Steve Kacerik, at an increased rate of \$195.00 per hour. This will increase the original agreement from \$80,000 to \$97,500 through June 30, 2007.

In witness whereof, this amendment has been executed on this day and year first above written.

CONSULTANT/SERVICE PROVIDER INFORMATION

Anthony L. Jackson
NAME (Type of firm)
7054 / 71-0889879
SOCIAL SECURITY NUMBER (last four digits only) / EMPLOYEE ID NUMBER
1525 NW 167th Street, Suite 410
MAILING ADDRESS
Miami, FL 33169
CITY / STATE / ZIP CODE
(305) 623 - 3032
TELEPHONE NUMBER / EXTENSION
PBSD 1843 (NEW 9/8/2000)

SIGNATURES

<u>A. L. Jackson</u>	<u>President</u>	<u>04/04/07</u>
SIGNATURE OF CONSULTANT / SERVICE PROVIDER	TITLE	DATE
<u>[Signature]</u>	<u>4-4-07</u>	
SIGNATURE OF AUTHORIZED SCHOOL / DEPARTMENT ADMINISTRATOR		DATE
<u>[Signature]</u>	<u>4/4/07</u>	
SIGNATURE OF AREA / ASSISTANT SUPERINTENDENT		DATE
<u>[Signature]</u>		
SIGNATURE OF SUPERINTENDENT / DESIGNEE		DATE
<u>[Signature]</u>		
SIGNATURE OF SCHOOL BOARD CHAIRMAN (if over \$10,000)		DATE

**Reviewed and Approved
as to Legal Sufficiency**

[Signature] 4/4/07

Steve Kacerik

Summary of qualifications

Senior Financial Systems Consultant/Business Analyst

- Specializing in the implementation of PeopleSoft Financials products
- Version 8.4, 8.8, 8.9 experience with Projects, GL, KK ,BD
- More than 10 years consulting experience implementing PeopleSoft Financials
- Industry experience includes 4 years Public Sector Commitment Control
- More than 20 years experience in Accounting and Finance Systems

Work experience:

Mar 2003 – Present **State of Connecticut** **Hartford, CT**

- **PS 8.4, 8.9 Financials Implementation**
- Commitment Control lead for the State of Connecticut
- Designed and configured Commitment Control
- Execute Actual and Budget fiscal year close (3years)
- Production Support for Commitment Control/Budget Checking (4 years)
- Created and implemented reconciliation report between Actuals and Budget
- Create nVision reports, Allocations and Combination Edit rules
- Project Costing Implementation Lead
- Design new Project Budget Structures for Commitment Control

Aug 2001 – Mar 2003 **Partners Healthcare System Inc.** **Boston, MA**

- **PS 8.4 Projects Implementation**
- Project Manager/Functional Lead for Projects 8.4 Implementation
- Integrate Projects with existing financial applications AM, AP, BD, GL, PO
- Assist in software evaluation for Project budgeting

Apr 2001 – August 2001 **HealthNow Blue Cross** **Buffalo, NY**

- **PS 8 Financials Upgrade**
- Provide FIT/GAP Analysis for Financials modules (GL, AP, AM, PO, BD)
- Recommended changes based on v8 functionality
- Setup new closing rules using Chartfield Value Sets

Nov 1999 – March 2001 **Partners Healthcare System Inc.** **Boston, MA**

- **PS 7.5 GL Implementation**
- Assist with all aspects of GL Implementation
- Converted history and ran GL closings for multiple years and ledgers
- Evaluate PS Projects Integration

Dec 1998 – Oct 1999 **Provident Mutual Insurance** **Berwyn, PA**

- **PS 7.5 Budgets Implementation**
- Functional lead PS Budgets 7.5 Implementation
- Assist with General Ledger Chartfield Design and Allocations

Jul 1998 – Jun 1999 **Delaware North Companies** **Buffalo, NY**

- **PS 7.5 GL Implementation**
- Lead General Ledger Design and FIT analysis sessions
- Lead chartfield design, business unit structure and mapping for conversion
- Assisted technical team in converting financial information
- Develop Weekly Operating System using PS GL
- Developed trees, nVision reports and assisted team members in developing their report layouts and scopes

Mar 1998 – Jul 1999 **HealthNow Blue Cross** **Buffalo, NY**

- **PS 7.5 Budgets Implementation**
- Functional lead PS Budgets 7.5 Implementation
- Developed nVision reports and assisted team members in developing their report layouts and scopes
- Coordinated user testing - perform testing, create and maintain testing logs
- Construct allocations and assist team members in design and development of allocations

Nov 1997 – Jun 1998 **Dart Group** **Landover, MD**

- **PS 6 GL Implementation**
- Assisted functional and technical team in converting financial data to GL
- Implemented General Ledger Business Rules for Dart and its subsidiaries
- Assisted functional and technical team in converting financial information to PS from three existing ledgers
- Developed nVision reports and assisted team members in developing their report layouts and scopes
- Coordinated user testing - perform testing, create and maintain testing logs
- Customized and tested the PS journal spreadsheet import for journal import processing
- Construct allocations and assist team members in design and development of allocations

Jan 1997 – Nov 1997 **PRC, Inc.** **McLean, VA**

- **PS Financials Upgrade**
- Provided functional and technical support for the 2.2 - 5.1 General Ledger upgrade
- Developed testing plans and scripts for all financial modules
- Coordinated user testing - perform testing, create and maintain defect logs
- Assisted Functional and Information Systems in resolving system defects
- Implemented Operator and Query Security

Jan 1996 – Jan 1997 Datastudy, Inc.

Jul 1996 – Jan 1997 **Independence Blue Cross** **Philadelphia, PA**

- **PS 5.1 GL Implementation**
- Provided functional support to consolidate the GL chart of accounts for IBC and its subsidiaries
- Completed GL requirement and design documents for chartfield key design, journal processing, reporting, data conversion and other GL 5.1 functionality
- Designed and developed a process for handling interunit accounting transactions
- Developed GL test plans and assisted in unit/system/parallel testing of the GL
- Designed and constructed chartfield element combination checking
- Developed and provided GL user training

Jan 1996 – Jul 1996 **Anthem Blue Cross** **Cincinnati, OH**

- **PS GL Upgrade**
- Developed and maintained GL upgrade project plans
- Documented current PS /GL requirements and design and developed changes necessary for the upgrade
- Developed a plan for reducing the number of chartfield elements required
- Assisted technical resources in comparing differences between the PS/GL 2.2/5.1 releases
- Assisted project manager in coordinating the execution of the upgrade process

- Developed GL training materials for users

Sep 1983 – Jan 1996 Allmerica Financial Worcester, MA

Jan 1994 – Jan 1996 Internal PS General Ledger Implementation Team

- Developed system interface design and strategy
- Lead General Ledger chartfield design
- Provided integration testing
- Designed and built a customization to provide multiple chartfield views for business units

Nov 1989 - Jan 1994 General Ledger Administrator

- Responsible for the administration of the Dun & Bradstreet General Ledger
- Coordinated monthly closings
- Responsible for report development, system controls and security
- Functioned as liaison between accounting and systems

Jan 1988 - Nov 1989 DBS GL Implementation Team

- One of four functional resources responsible for GL implementation
- Designed and implemented journal processing and controls
- Designed and implemented system security

Sep 1983 - Jan 1988 Financial Analyst/Cost Accountant

- Worked in a number of corporate accounting positions for a large Life and Health Insurance Company
- Prepared and analyzed internal Financial reports for management
- Prepared annual statutory insurance reports to be filed with all states
- Provided cost/benefit and break-even analysis for proposed capital expenditures
- Developed workflow and procedural analysis for insurance operations

Education

December 1991 Nichols College Dudley, MA
MBA, Finance

May 1983 Bryant College Smithfield, RI
Bachelors, Accounting