

CBO Mentor Project



A partnership of

**FCMAT
CCSESA
BASC
CASBO
SSC**

CBO Mentor Project

**Fiscal Crisis and Management Assistance Team (FCMAT)
California Association of School Business Officials (CASBO)
California County Superintendent Educational Services Association
(CCSESA)
Sub-Committee: Business and Administration Steering Committee
(BASC)
School Services of California (SSC)**

Mentor Application 2008-09 (5th Cohort)

September 1, 2007

**Fiscal Crisis & Management Assistance Team
1300 17th Street – CITY CENTRE
Bakersfield CA 93301-4533**

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Purpose

The Chief Business Officials (CBO) training program is targeted to produce qualified California school district CBO's. This one year program provides classroom training which takes place in ten sessions (Friday night, Saturday day). Instructors are qualified and experienced CBO's with a minimum of 10 years experience. This program is unique because of the following four major components:

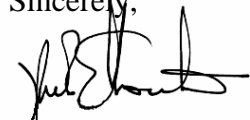
- 1) Each participant is teamed with their own mentor
- 2) Participants are nominated and screened
- 3) Training involves "hands-on" experience
- 4) Training program is free to participants
(FCMAT is underwriting professional development activity)

The CBO Mentor Project is a joint endeavor of FCMAT, CCSESA, BASC, CASBO, and SSC. It is our intent through interagency collaboration to assist school districts in filling CBO vacancies throughout California with qualified CBO's. Currently, there is an effort to establish a certification process for CBO positions in the state's nearly 1,000 school districts. It is our intent to assist in establishing standards and training components to meet the fiscal accountability issue facing our school districts. We developed with CASBO, a link training program to the CBO Certification program with the intent that a successful participant may receive CBO certification, dependent upon evaluation by the CBO program evaluator and their mentor evaluation.

Participants will improve their understanding of fundamental issues that drive school business policies in each major functional area, including: school finance, accounting and budgeting, facilities, maintenance and operations, transportation, contracts and procurement, risk management, and the importance of having strong effective leadership skills. A curriculum that is reflective of current functions and responsibilities required of a district CBO has been adopted by the CBO Steering Committee.

We are encouraging applicants statewide to compete for these limited CBO positions. We are pleased to present this professional development activity in relationship with the other professional trainings that are focusing on fiscal accountability.

Sincerely,



Joel Montero, Chief Executive Officer
Fiscal Crisis and Management Assistance Team

Implementation Timeline

April 2008-March 2009

I. Application Timeline

- Application, resume and one letter of reference are due **December 14, 2007 by 5:00 p.m.**
Incomplete applications will not be accepted.

Mail application, resume and letter of reference to (certified mail recommended):

Barbara Smith, Executive Secretary II

FCMAT

1300 17th Street - City Centre

Bakersfield CA 93301-4533

661-636-4308

Email: bsmith@fcmat.org

II. Selection Timeline

- January 2008 - Selection of Mentors
- February 2008 - Notification of Selected Mentors

Qualifications

- ✓ Currently holds position of Chief Business Official or actively involved as retired CBO
- ✓ Extensive experience as a CBO (10 years or more of experience)
- ✓ Hands-on experience in all facets of school business operations
- ✓ Holds degree in business related field. CBO certification, or demonstrated workplace experience
- ✓ Demonstrated performance developing business personnel
- ✓ Commitment for minimum 8-10 hours a month of one-on-one mentoring with candidate
- ✓ Able to provide work study supervision to candidate in accordance with curriculum guidelines

Mentor Application Form

2008-09

Please submit your application, current resume and one letter of reference by **5:00 p.m. on December 14, 2007.** All documents are required to make this a valid application.

Name: _____

Title: _____

Previous Title, if retired: _____

County of Residence: _____

No. Years as CBO: _____

(COE / District /Community College)

Agency Name: _____

Work Address: _____

Work Phone: _____

Home Address: _____

Home Phone: _____

Email address: _____

Male Female

1. Does your Superintendent and/or School Board support this mentor position?
 Yes No N/A

2. Do you commit to a minimum of 8-10 hours per month of one-on-one mentoring with the selected candidate?

3. Are you now or have you been a participant in the SB 352, CBO Training Program?
 Yes No

Signature _____

Responsibilities

Training Sessions:

(Required*)

(Requested**)

- ** April 26, 2008 – Meet and Greet/Orientation Meeting
CASBO Annual Conference, Anaheim, CA
 - New and returning Mentor Orientation – 3:00 p.m. – 4:00 p.m.
 - Meet and Greet for all Participants and Mentors – 4:00 p.m. – 6:00 p.m.
- * April 4, 2008 - First Meeting Welcome/Overview/Introductions – 2:00 p.m.
- ** November 2008 – CASBO CBO Symposium
Mid year Evaluation: Strengths/Weaknesses Input from Mentors and Participants
- ** March 7, 2009 - Final Class/Graduation/Presentation Certificates

General Responsibilities:

- Be available to mentor and provide guidance and support to participant via e-mail, phone, fax, or in person.
- Keep in contact monthly with CBO Mentor Coordinator regarding participant's progress via e-mail.
- Monitor classroom assigned projects that are work related and assists with grading performance, if requested by CBO Mentor Project Instructor.
- Complete monthly assignment checklist.
- Complete CBO Assessment Instrument.

Participate in the following evaluation process:

- Provide objective evaluation of participant's progress.
- Participate in joint evaluation of the process between mentor and participant.
- Complete all evaluation forms concerning effectiveness of CBO Mentor Project provided by FCMAT.
- Provide FCMAT with written feed back regarding strengths and weaknesses of CBO Mentor Project curriculum development.
- Assess the participant to determine strengths and identify areas of growth.

Stipends:

- Mentors will receive a one time stipend of \$2,500 to be paid in March 2009.

Training Schedule 2008-09

	Dates
Session I	April 4 & 5, 2008 @ 2:00 p.m. on Friday
Session II	May 9 & 10, 2008
Session III	June 27 & 28, 2008
Session IV	August 22 & 23, 2008
Session V	September 12 & 13, 2008
Session VI	October 17 & 18, 2008
Session VII	November 2008 CASBO CBO Symposium
Session VIII	January 9 & 10, 2009
Session IX	February 6 & 7, 2009
Session X	March 6 & 7, 2009
Graduation	March 7, 2009

Trainings begin at 5:00 p.m. on Friday evening and end at 9:00 p.m. Saturday class is from 8:00 a.m. – 3:00 p.m. at the Hilton Garden Inn Sacramento/South Natomas, 2540 Venture Oaks Way, Sacramento, CA 95833.

Meet and Greet Reception (optional attendance) hosted by FCMAT, CCSESA, BASC, CASBO and SSC and at the CASBO Annual Conference, Anaheim on April 26, 2008.

Mentors are welcome to attend any training sessions at their own expense.