



CBO Mentor Project Monday Morning Letter
Class Update - #1

To: CBO Mentor Project Participants
Cohort #5 (as yet unnamed)

From: Francie Heim (and the team; Bill McGuire, Bill Gillaspie, Mary Turcotte)

Date: April 5, 2008

Our thanks to you for an amazing weekend! This letter is longer than usual but contains a great deal of critical information for you as you prepare for the next class.

IMPORTANT REMINDERS

Monday Morning ZOOMERANG Survey - complete
Mentor discussion before next class (official list below)
Assignments for next class (official list below)

CASBO Conference CBO Mentor Project Annual Meet and Greet/Social
April 26 3:00 to 5:00 Hilton Anaheim 777 Convention Way, Anaheim
Suite 14-530 R.S.V.P to Bill McGuire by April 12, 2008
Hosted by FCMAT, School Services of CA, Bill McGuire & Francie Heim

It was a pleasure to meet our fifth class of future CBO's. Having graduated four classes of future CBO's, we continue to be astounded by the diversity and talents of the groups we have the privilege to teach and mentor.

One of the recommendations of Class #3 was to start early on the first Friday and spend some time for the **group to get acquainted**. We have watched Class 4 and now Class 5 go through this added element and it definitely jump starts the critical relationship building aspect of the program. Who will take up the challenge to be the first class member to know the entire class by first and last names? Someone asked my secret to learning all your names in two hours. Throughout my career, I have been terrible at remembering names. BUT, with the CBO Mentor program it simply became a priority to focus, learn and remember.

Be thinking about your **Class Name**. Names to date: First Class, 2nd to None, Joel's Favorite; We Raised the Bar, Fantastic Fourth.

Joel Montero (CEO of FCMAT) welcomed both Mentors and Participants on Friday night. We are grateful that FCMAT provides financial support for this program, but equally grateful for the passion and belief in the program that you heard clearly expressed by Joel.

The Mentor turnout on Friday night was awesome. **Bill Gillaspie and Mary Turcotte** provided a one hour orientation to the mentors, as well as providing a binder of resource materials. For those who didn't receive a binder, Bill Gillaspie will be sending them by mail. Also, check the FCMAT website for online versions of the information. Mentors are always welcome to attend any session.

We extend our thanks to **Terry Bradley**, Superintendent of Clovis Unified. His words of wisdom on "What it means to be a CBO" are reinforced by his own experiences as a CBO and Superintendent.

Another recommendation from Class #4 was to redesign the Friday evening session. We added **the panel of "alumni"** from the program to share their impressions. It was a double bonus for us. Not only did we get to hear their great stories but we got to see old friends from previous classes.

Ken Hawkins, our communication workshop presenter, worked his usual magic. We so rarely take the time to focus on the powerful skills of listening and communicating and yet they are critical tools to being a successful CBO.

Another part of the program we look forward to is the **"Strengths"** analysis. As core instructors, Bill McGuire and I look forward to the entertaining mix of "Strengths" and styles that each cohort brings to the table. The class "Strengths" are attached to this letter for future reference.

Another change for class #5 is our Saturday afternoon session. A CBO is a member of the district leadership team, **dedicated to student success**. A successful CBO needs to speak the language of the instructional division as a first step. **Dr. Linda Hauser**, Chief Academic Officer for Fresno Unified, was our guest speaker. For our many participants who come from the business side of the educational house, it is fair to say that it was an eye opening experience. Linda did an excellent job giving an overview of the many complex issues facing the instructional side of the house with regards to state and federal accountability, testing, credentialing, and assorted categorical funding challenges. Our **core business is TEACHING** and our **product is STUDENT LEARNING**. Note: You can find the video online at YouTube; Shift Happens. <http://www.youtube.com/watch?v=ljbI-363A2Q>

Hopefully you are getting a sense of our team. It is a perfect illustration of how various strengths combine to make a group more effective. I have repeated below the chart we

shared, that shows the **strengths of the team**. We have a limited number of strengths in common, which makes us a stronger team.

	Francie Heim	Bill McGuire	Bill Gillaspie	Mary Turcotte
1	Strategic	Includer	Empathy	Connectedness
2	Responsibility	Competition	Harmony	Consistency
3	Learner	Activator	Positivity	Empathy
4	Focus	Self-Assurance	Developer	Ideation
5	Woo	Ideation	Woo	Relator
Style	Competing Accommodating	Competing	Collaborating	Compromising

You have probably already realized that we will be using your various strengths to build working groups throughout the year. Get ready for some challenges and opportunities for learning.

Below are your assignments.

MENTOR DISCUSSION TOPICS

Discuss with your mentor what they think is the role of a CBO and the qualities they feel are critical to be successful. Discuss your strengths and the strengths of your mentor. Discuss your aspirations to be a CBO and what you and your mentor feel are the skills you need to acquire or expand to be successful.

Discuss student achievement and how they believe a CBO plays a role with the district leadership team in achieving student success. Discuss with them your assignment to talk for two minutes about student achievement.

Discuss your income topic selection.

What is your district revenue limit? Bring to the class a copy of your district revenue limit calculation as presented in the 2nd interim report. Discuss with your mentor where your revenue limit is in relationship to the state wide average for your type of district. Do you know why it is above or below statewide average?

What is your mentor’s philosophy on budget presentations? Bring back any ideas or suggestions to the class for discussion.

Come to class prepared. You will be called on in class to share the results of these discussions.

Assignments due for May

1. Select an income topic for your written paper. Discuss the selection with your mentor (guidelines below)
2. Come prepared to talk (TWO MINUTES) about student achievement in your district.
3. Review the Clovis Unified School District Budget On-line at :
<http://www.cusd.com/business/budget.htm>
 - “Do not Print”
 - You have an acting part! Review with that in mind. Acting parts below.
 - Bill McGuire will do a budget presentation on Friday May 9
 - You will be observing his presentation and asking him questions.
4. Attend a board meeting in June where a budget is being presented.
 (Your district, your mentor’s district, or another district of your choice).

Budget Role Assignments	
CURRENT BOARD MEMBER WHO IS KNOWN FOR BEING RATIONAL	Barnes, Leslie
BOARD MEMBER SUPPORTED BY CSEA	Booth, Kassandra
BOARD MEMBER WHO USED TO BE A TEACHER IN THE DISTRICT BUT WAS FIRED	Cabey, Shawn
FORMER RECALLED BOARD MEMBER	Cherniss, Alex
BOARD MEMBER WHO USED TO BE THE CBO OF THE DISTRICT IN 1945	Craig, Aubrey
SOCCER MOM	Cunnane, Kathy
PARENT OF A CHILD WITH SPECIAL NEEDS	Deaton, John
PARENT OF A CHILD ENROLLED IN GATE	DeGeyter, Julienne
HIGH SCHOOL MATH TEACHER	Duldulao, Filipinas
HIGH SCHOOL FOOTBALL COACH	Elia, Sam
KINDERGARTEN TEACHER	Fagan, Richard
BAND TEACHER	Flores, David
NEWSPAPER REPORTER (LOCAL PAPER) SEASONED VETERAN OF 6 MONTHS	Fogerty, Michael
CSEA PRESIDENT	Glaspey, Melody
CSEA MEMBER - NEW TO NEGOTIATION TEAM	Hawkins, Brian
ECTA PRESIDENT	Jorgensen, Steven
ECTA MEMBER - NEW TO NEGOTIATION TEAM	Kimmel, Karen
RETIREE OF THE DISTRICT - FORMER ADMINISTRATOR	Lantsberger, Scott
CRANKY CURMUDGEON WHO WRITES WEEKLY LETTERS TO THE EDITOR	Manansala-Smith, Roslynn
INTERESTED PARENT - CPA	McCoy, Mark
INTERESTED PARENT - CEO OF A LARGE COMPANY	Sepulveda, Richard
INTERESTED PARENT - opposed too school fees	Statton, Christine
INTERESTED PARENT WILLING TO RUN FUNDRAISERS TO SOLVE ALL THE PROBLEMS	Trader, Jeffery
BILL MCGUIRES BEST FRIEND THERE FOR MORAL SUPPORT	VanBuskirk, Peter
CONTINUATION PRINCIPAL	Ward, Steve
INTERESTED PARENT - HEAD OF TECHNOLOGY COMPANY	Willis, Jason

INCOME PAPER DETAILS

Income Paper Assignment. Step 1 – Select Topic

Each class member selects an income source to research.

Examples

Class Size Reduction	Special Education
Transportation Funding	Food Service/Child Nutrition
Community Day School Funding	School Facilities funding
Adult Education	ROC/P
Charter Schools	Deferred Maintenance

*not a complete list by any means– but some suggestions; you may choose another area of focus

Important:

Project **must** be approved by your mentor.

Guideline – You must be **CHALLENGED** by the research.

Not allowed: Dusting off an old report you gave to your board. Cutting and pasting from a School Services document. Picking a topic that is EASY, e.g. a Food Service Director selecting Child Nutrition or a Facility Director selecting Facility Funding.

- First DRAFT to your mentor for review by July 1.
- Rewrites done by August 1 and submitted electronically to Francie for review and comments.
- We will share the final documents with the class. Sample documents from a previous class will be shared.

OBJECTIVE OF THIS PROJECT:

In 10 classes, we cannot cover all the various areas and topics of school finance. However, your research will provide your **classmates with additional resources** to utilize.

Writing skills are critical to being a successful CBO. This is an opportunity for you to get **feedback on your writing skills** from your mentor.

There is the additional importance of being sensitive to the language we use in communicating with our board, employees and our community. Do you sound like a **“Bean Counter”** or a **LEADER** dedicated to student success? We will ask your mentor to provide you input on how you come across in your communication and how you can improve.

Required Report Elements:

- As you describe how the program and funding work – keep in mind the following guidelines
 - Leadership – what is the CBO leadership role with regards to the funding/program?
 - People – identify the stakeholders
 - Systems – what are the systems that should be in place with regards to this funding source?
 - Resources – identify the resources, e.g., how the funding works
- Ed Code Citations
- Any other important considerations regarding the program
- Fiscal implications for your agency – e.g., if CSR funding, discuss encroachment
- Length of Report – One page executive summary, with at least three or more pages of additional detail
- Other elements that your mentor suggests would be relevant for the topic

WEBSITE RESOURCES THAT MAY BE HELPFUL:

- Legislative Analyst's Office (LAO: www.lao.ca.gov)
- Find Bills of Interest in the California Legislature (BILLS: www.leginfo.ca.gov/bilinfo.html)
- Search the California Code (CAL CODE: leginfo.public.ca.gov/calaw.html)
- Office of Public School Construction (OPSC: www.opsc.dgs.ca.gov)
- California Department of Education (CDE: www.cde.ca.gov)
- Fiscal Crisis & Management Assistance Team (FCMAT: www.fcmat.org)
- ED-DATA (ED-DATA: www.ed-data.k12.ca.us)
- School Services of California (SSC: www.sscal.com)
- Coalition for Adequate School Housing (C.A.S.H.: www.cashnet.org)
- California Association of School Business Officials (CASBO: www.casbo.org)
- Association of School Administrators (ACSA: www.acsa.org)
- California School Boards Association (CSBA: www.csba.org)
- CA County Superintendents Educational Services Association (CCSESA: www.ccsesa.org)

FUTURE MEETING SCHEDULE

Meeting Schedule .

You should have all the dates in your calendar. All of these are in Sacramento except the November class held in connection with the CASBO CBO symposium. More details to follow. The DRAFT schedule of classes for the year is in your introductory binder BUT we do modify topics and times throughout the year based on changing speaker needs or adjusting for time for specific topics. We will provide an update with each "Monday Morning Letter". Dates won't change however.

April 4 & 5 2008
May 9 & 10
June 27 & 28
August 22 & 23
September 12 & 13
October 17 & 18
November 20,21,22 CBO Symposium
January 9 & 10 2009
February 6 & 7
March 6 & 7

	1	2	3
	April 4 & 5, 2008	May 9 & 10	June 27 & 28
2:00 to 4:00	Meet and Greet for Participants		
5:00 to 6:00	Dinner	Working Dinner	Working dinner - leadership problems
6:00 to 6:30	What it means to be a CBO (Terry Bradley)	May Revise (Sandy Silberstein)	County office Fiscal Oversight (Wendy Benkert)
6:30 to 7:00			
7:00 to 7:30	Panel Discussion	Leadership Strengths exercise (3 problems - 6 teams)	Fiscal Crisis-FCMAT perspective (Joel Montero)
7:30 to 8:00			
8:00 to 8:30	Closing - Joel Montero	Budget Presentation (Bill McGuire)	
8:30 to 9:00			
Saturday	Saturday	Saturday	Saturday
8:00 to 8:30	Communication Workshop (Ken Hawkins)	School Finance - Revenue (Francie Heim)	Leadership "21"
8:30 TO 9:00			
9:00 to 9:30			
9:30 to 10:00			
10:00 to 10:30			
10:30 to 11:00			
11:00 to 11:30			
11:30 to 12:00			
12:00 to 12:30	LUNCH - Strengths Review	working lunch	LUNCH
12:30 to 1:00			
1:00 to 1:30	What a CBO needs to know about Curriculum and Instruction	School Finance (Francie Heim)	Accounting Basics/Financial Reporting (Francie)
1:30 to 2:00			
2:00 to 3:00			

CLASS STRENGTHS & STYLES

Strengths Finder 2.0 Results for CBO Cohort # 5

Last Name	First Name	Strength 1	Strength 2	Strength 3	Strength 4	Strength 5
Barnes	Leslie	Relator	Empathy	Strategic	Communication	Adaptability
Booth	Kassandra	Input	Context	Arranger	Individualization	Learner
Cabey	Shawn	Input	Learner	Achiever	Ideation	Activator
Cherniss	Alex	Competition	Command	Context	Significance	Maximizer
Craig	Aubrey	Achiever	Responsibility	Consistency	Learner	Belief
Cunnane	Kathy	Achiever	Responsibility	Deliberator	Relator	Learner
Deaton	John	Woo	Communication	Strategic	Responsibility	Restorative
DeGeyter	Julienne	Learner	Input	Intellection	Strategic	Achiever
Duldulao	Filipinas	Learner	Achiever	Arranger	Analytical	Consistency
Elia	Sam	Relator	Futuristic	Arranger	Deliberative	Restorative
Fagan	Richard	Analytical	Context	Individualization	Achiever	Adaptability
Flores	David	Responsibility	Achiever	Learner	Intellection	Relator
Fogerty	Michael	Context	Command	Analytical	Competition	Significance
Glaspey	Melody	Responsibility	Learner	Analytical	Achiever	Developer
Hawkins	Brian	Analytical	Responsibility	Ideation	Individualization	Strategic
Jorgensen	Steven	Achiever	Developer	Harmony	Empathy	Consistent
Kimmel	Karen	Analytical	Relator	Responsibility	Consistency	Discipline
Lantsberger	Scott	Relator	Deliberative	Achiever	Consistency	Learner
Manansala-Smith	Roslynne	Context	Learner	Achiever	Connectedness	Relator
McCoy	Mark	Strategic	Individualization	Learner	Achiever	Relator
Sepulveda	Richard	Learner	Responsibility	Ideation	Developer	Arranger
Statton	Christine	Strategic	Woo	Belief	Ideation	Includer
Trader	Jeffery	Context	Harmony	Arranger	Restorative	Developer
VanBuskirk	Peter	Achiever	Learner	Individualization	Strategic	Arranger
Ward	Steve	Responsibility	Learner	Ideation	Belief	Relator
Willis	Jason	Learner	Input	Achiever	Analytical	Responsibility

CLASS STRENGTHS & STYLES

Sort of Styles - TOP 3 Rankings			
Name	Style	Score	Ranking
Fogerty, Michael	Accommodating	8	1
Deaton, John	Accommodating	7	2
Manansala-Smith, Roslyne	Accommodating	10	2
McCoy, Mark	Accommodating	7	2
Statton, Christine	Accommodating	7	2
DeGeyter, Julianne	Accommodating	5	3
Sepulveda, Richard	Accommodating	6	3
Cunnane, Kathy	Avoiding	8	1
DeGeyter, Julianne	Avoiding	11	1
Glaspey, Melody	Avoiding	9	1
Jorgensen, Steven	Avoiding	9	1
Manansala-Smith, Roslyne	Avoiding	10	1
McCoy, Mark	Avoiding	7	1
Sepulveda, Richard	Avoiding	10	1
Kimmel, Karen	Avoiding	6	2
Booth, Kassandra	Avoiding	5	3
Craig, Aubrey	Avoiding	7	3
Duldulao, Filipinas	Avoiding	6	3
Elia, Sam	Avoiding	6	3
Fagan, Richard	Avoiding	7	3
Flores, David	Avoiding	7	3
Statton, Christine	Avoiding	6	3
Trader, Jeffery	Avoiding	7	3
VanBuskirk, Peter	Avoiding	6	3
Willis, Jason	Avoiding	6	3
Booth, Kassandra	Collaborating	10	1
Cabey, Shawn	Collaborating	8	1
Fagan, Richard	Collaborating	8	1
Flores, David	Collaborating	8	1
Trader, Jeffery	Collaborating	8	1
Ward, Steve	Collaborating	9	1
Cherniss, Alex	Collaborating	8	2
Craig, Aubrey	Collaborating	7	2
Cunnane, Kathy	Collaborating	7	2
Duldulao, Filipinas	Collaborating	7	2
Elia, Sam	Collaborating	9	2
VanBuskirk, Peter	Collaborating	6	2
Willis, Jason	Collaborating	6	2
Fogerty, Michael	Collaborating	7	3
Glaspey, Melody	Collaborating	6	3
Hawkins, Brian	Collaborating	6	3
Lantsberger, Scott	Collaborating	7	3
Craig, Aubrey	Competitor	8	1
Cabey, Shawn	Competitor	7	2
Fogerty, Michael	Competitor	7	2
Hawkins, Brian	Competitor	7	2
Lantsberger, Scott	Competitor	7	2
Cherniss, Alex	Competitor	7	3
Deaton, John	Competitor	5	3
Jorgensen, Steven	Competitor	6	3
Kimmel, Karen	Competitor	5	3
McCoy, Mark	Competitor	5	3
Ward, Steve	Competitor	5	3
Cherniss, Alex	Compromising	9	1
Deaton, John	Compromising	8	1
Duldulao, Filipinas	Compromising	11	1
Elia, Sam	Compromising	11	1
Hawkins, Brian	Compromising	8	1
Kimmel, Karen	Compromising	11	1
Lantsberger, Scott	Compromising	10	1
Statton, Christine	Compromising	11	1
VanBuskirk, Peter	Compromising	9	1
Willis, Jason	Compromising	9	1
Booth, Kassandra	Compromising	10	2
DeGeyter, Julianne	Compromising	8	2
Fagan, Richard	Compromising	7	2
Flores, David	Compromising	7	2
Glaspey, Melody	Compromising	8	2
Jorgensen, Steven	Compromising	8	2
Sepulveda, Richard	Compromising	9	2
Trader, Jeffery	Compromising	8	2
Ward, Steve	Compromising	8	2
Cabey, Shawn	Compromising	5	3
Cunnane, Kathy	Compromising	7	3
Manansala-Smith, Roslyne	Compromising	6	3