

CBO Mentor Project

Class #2

May 8 & 9, 2009



DRAFT Outline

	2	3	4
	May 8 & 9	June 26 & 27	August 21 & 22
5:00 to 6:00	Working Dinner	Working dinner leadership problems	Working Dinner
6:00 to 6:30	Leadership Strength exercise	County office Fiscal Oversight (Wendy Benker)	Independent Audit
6:30 to 7:00			
7:00 to 7:30	Budget Presentation (Bill McGuire)	Fiscal Crisis-FCMAT perspective (Joel Montero)	Medical Benefit Teri Ezaki
7:30 to 8:00			
8:00 to 8:30			
8:30 to 9:00			
Saturday	Saturday	Saturday	Saturday
8:00 to 8:30	School Finance - Revenue (Francie Helm)	Leadership "21"	Financial reporting (Francie Helm)
8:30 TO 9:00			
9:00 to 9:30		Legal Issues & Contracts (Harold Frelma Lozano Smith)	
9:30 to 10:00			
10:00 to 10:30		CASH	
10:30 to 11:00			
11:00 to 11:30			
11:30 to 12:00	Politics of School Finance (Kevin Gordon)		
12:00 to 12:30	working lunch	working lunch	working lunch
12:30 to 1:00	School Finance (Francie Helm)	Leadership "21"	Financial reporting (Francie Helm)
1:00 to 1:30			
1:30 to 2:00		Trend Analysis Financial Reporting (Francie)	
2:00 to 3:00			



Team Contact Information

Reminders:

MONDAY MORNING SURVEY FROM BILL M. – PLEASE RESPOND

MONDAY MORNING – LETTER FROM FRANCIE RECAPPING

Team Contact Information	cell phone	Strengths	Typical category of questions:
Bill Gillaspie hgillaspie@fcmat.org	(661) 204-0579	Empathy/Developer	Absences, college credit, life problems
Bill McGuire billm@91a-us.com	(530) 297-3901	Competition/Includer	What do I need to do with the rest of my life in order to win?
Francie Heim fheim@edcoe.org	(530) 3138516	Strategic/Responsibility	What do I need to do for class?
Mary Turcotte mwturcotte@comcast.net	(530) 417-4405	Empathy/Relator	Mentor questions & problems

THE WEEKEND (also posted to FCMAT website)
Check your spam filters

	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 Accomodatin	Competing	Collaborating	Compromising

Introduction of Guests

Celebrations

Challenges

Have you learned your classmate names?

Class Name? 1st class, 2nd to none, Joel's Favorites, Fantastic 4th, 5 Star Leaders..



WORKING DINNER

Random Selection Stand

Identify the district selected

**Research relative to Student Achievement
(e.g. who did you talk to, where did you go for resource
documents)**

**Talk about student achievement in your district
(or selected district)**

2 MINUTE TALK

Stop watch for each table.

Volunteer time keeper.



MENTOR DISCUSSION

Discuss with your mentor what they believe 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.



MENTOR DISCUSSION

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?

Note: county offices select a district in your county.



Interview Question:

Practice your opening interview question/answer with your mentor.

“Please tell us about yourself, your education and your experience, as it relates to this position.” Time your response to be under five minutes.



Written Assignment

MAY Written Assignment

Prepare a 200 – 300 word summary that describes your district revenue limit funding for 2008-09. Include whether you are above or below the statewide average (and why). Include the percentages of state aid and property tax. **Describe it as though you were including the description in a budget document.**

You will be given an opportunity to rewrite the assignment AFTER the class on school finance. So please consider this a first DRAFT.

For those new to revenue limits, if you need more help and support for this assignment, please contact the instructor, fheim@edcoe.org or your mentor. We will cover this in great detail at the next session. This assignment is to start the process of orienting you to this topic.

SUBMIT ELECTRONICALLY TO FRANCIE by June 1, 2009. see email for details.

Name the file: lastnameRL e.g. heimRL

cbomentor6@gmail.com



Written Assignment – last class

FCMAT writers have provided some great insight into your writing.

Discussion at your table:

Do you agree with their comments? Did it improve the message you were trying to communicate?



Leadership 6:00 to 7:00 Exercise

Approximate times

Bill McGuire will put us to work in Teams.



Strengths

Our strength exercise forms the basis for many of our leadership and team building activities. Understanding your strengths is the easy part of this leadership lesson.

What strengths do you NOT have?

What strengths do you need on your team in order for your team to succeed?

How do you learn to value the strengths that your team members bring to the table?



FCMAT Mentor Program - 6th Cohort

Participant's Strengths from "Know your Strengths 2.0"

	First Name	Last Name	Strength 1	Strength 2	Strength 3	Strength 4	Strength 5
1	Jack	Bachofer	Achiever	Learner	Strategic	Deliberative	Analytical
2	Donna	Barber	Relator	Achiever	Maximizer	Woo	Communication
3	Keith	Beeman	Achiever	Analyst	Learner	Input	Deliberative
4	Helen	Bellonzi	Achiever	Includer	Analytical	Arranger	Connectedness
5	Debbie	Bentley	Consistency	Harmony	Responsibility	Arranger	Includer
6	Pam	Buckhout	Harmony	Responsibility	Achiever	Analytical	Focus
7	Laura	Carevic	Learner	Deliberative	Relator	Individualization	Connectedness
8	Carolyn	Chow	Harmony	Deliberative	Discipline	Focus	Responsibility
9	Megan	Curtis	Strategic	Maximizer	Achiever	Self-Assurance	Relator
10	Patricia	Deming	Positivity	Strategic	Relator	Arranger	Developer
11	Lisa	Ensign	harmony	individualization	arranger	discipline	responsibility
12	Linda	Fabre	Strategic	Relator	Communication	Self-Assurance	Maximizer
13	Martin	Fregoso	Learner	Analytical	Strategic	Responsibility	Achiever
14	Debbie	Fry	Input	Learner	Achiever	Strategic	Analytical
15	Jennifer	Goodner	Adaptability	Activator	Empathy	Relator	Context
16	Yancy	Hawkins	Woo	Context	Positivity	Activator	Maximizer
17	Gaby	Hellier	Maximizer	Achiever	Relator	Input	Learner
18	Ashley	Lightfoot	Learner	Arranger	Individualization	Responsibility	Context
19	Michael	Merrill	organization	communication	willingness to learn	enthusiasm	honesty
20	Jeff	Napier	Learner	Responsibility	Ideation	Context	Strategic
21	Kathy	Perkins	Includer	Arranger	Analytical	Learner	Responsibility
22	Scott	Price	Positivity	Includer	Restorative	Command	Strategic
23	Greg	Rash	Harmony	Communication	WOO	Positivity	Arranger
24	Candace	Reines	Responsibility	Self-Assurance	Analytical	Competition	Achiever
25	Todd	Rivera	Restorative	Responsibility	Context	Competition	Empathy
26	Rob	Schamberg	Strategic	Achiever	Self-Assurance	Relator	Arranger
27	Fred	Van Vleck	Competition	Command	Ideation	Strategic	Activator

Jack	Bachofer	1	Achiever
Keith	Beeman	1	Achiever
Helen	Bellonzi	1	Achiever
Donna	Barber	2	Achiever
Gaby	Hellier	2	Achiever
Rob	Schamberg	2	Achiever
Pam	Buckhout	3	Achiever
Megan	Curtis	3	Achiever
Debbie	Fry	3	Achiever
Martin	Fregoso	5	Achiever
Candace	Reines	5	Achiever
		Achiever Count	10
Jennifer	Goodner	2	Activator
Yancy	Hawkins	4	Activator
Fred	Van Vleck	5	Activator
		Activator Count	3
Jennifer	Goodner	1	Adaptability
		Adaptability Count	1
Keith	Beeman	2	Analytical
Debbie	Fry	5	Analytical
Martin	Fregoso	2	Analytical
Helen	Bellonzi	3	Analytical
Kathy	Perkins	3	Analytical
Candace	Reines	3	Analytical
Jack	Bachofer	5	Analytical
Pam	Buckhout	4	Analytical
		Analytical Count	8
Ashley	Lightfoot	2	Arranger
Kathy	Perkins	2	Arranger
Lisa	Ensign	3	arranger
Helen	Bellonzi	4	Arranger
Debbie	Bentley	4	Arranger
Patricia	Deming	4	Arranger
Michael	Merrill	5	Arranger
Greg	Rash	5	Arranger
Rob	Schamberg	5	Arranger
		Arranger Count	9

Fred	Van Vleck	2	Command
Scott	Price	4	Command
		Command Count	2
Greg	Rash	2	Communication
Linda	Fabre	3	Communication
Donna	Barber	5	Communication
		Communication Count	3
Fred	Van Vleck	1	Competition
Candace	Reines	4	Competition
Todd	Rivera	4	Competition
		Competition Count	3
Helen	Bellonzi	5	Connectedness
Laura	Carevic	5	Connectedness
		Connectedness Count	2
Debbie	Bentley	1	Consistency
Michael	Merrill	1	Consistency
		Consistency Count	2
Yancy	Hawkins	2	Context
Todd	Rivera	3	Context
Jeff	Napier	4	Context
Jennifer	Goodner	5	Context
Ashley	Lightfoot	5	Context
		Context Count	5
Laura	Carevic	2	Deliberative
Carolyn	Chow	2	Deliberative
Jack	Bachofer	4	Deliberative
Keith	Beeman	5	Deliberative
		Deliberative Count	4
Patricia	Deming	5	Developer
		Developer Count	1
Carolyn	Chow	3	Discipline
Lisa	Ensign	4	discipline
		Discipline Count	2

Jennifer	Goodner	3	Empathy
Todd	Rivera	5	Empathy
		Empathy Count	2
Carolyn	Chow	4	Focus
Pam	Buckhout	5	Focus
		Focus Count	2
Pam	Buckhout	1	Harmony
Carolyn	Chow	1	Harmony
Lisa	Ensign	1	harmony
Greg	Rash	1	Harmony
Debbie	Bentley	2	Harmony
		Harmony Count	5
Jeff	Napier	3	Ideation
Fred	Van Vleck	3	Ideation
		Ideation Count	2
Kathy	Perkins	1	Includer
Helen	Bellonzi	2	Includer
Scott	Price	2	Includer
Debbie	Bentley	5	Includer
		Includer Count	4
Lisa	Ensign	2	individualization
Ashley	Lightfoot	3	Individualization
Laura	Carevic	4	Individualization
		individualization	3
Debbie	Fry	1	Input
Keith	Beeman	4	Input
Gaby	Hellier	4	Input
		Input Count	3
Laura	Carevic	1	Learner
Martin	Fregoso	1	Learner
Ashley	Lightfoot	1	Learner
Jeff	Napier	1	Learner
Jack	Bachofer	2	Learner
Debbie	Fry	2	Learner
Keith	Beeman	3	Learner
Kathy	Perkins	4	Learner
Gaby	Hellier	5	Learner
		Learner Count	9

Gaby	Hellier	1	Maximizer
Megan	Curtis	2	Maximizer
Donna	Barber	3	Maximizer
Linda	Fabre	5	Maximizer
Yancy	Hawkins	5	Maximizer
		Maximizer Count	5
Patricia	Deming	1	Positivity
Scott	Price	1	Positivity
Yancy	Hawkins	3	Positivity
Greg	Rash	4	Positivity
		Positivity Count	4
Donna	Barber	1	Relator
Linda	Fabre	2	Relator
Laura	Carevic	3	Relator
Patricia	Deming	3	Relator
Gaby	Hellier	3	Relator
Jennifer	Goodner	4	Relator
Rob	Schamberg	4	Relator
Megan	Curtis	5	Relator
		Relator Count	8
Candace	Reines	1	Responsibility
Pam	Buckhout	2	Responsibility
Jeff	Napier	2	Responsibility
Todd	Rivera	2	Responsibility
Debbie	Bentley	3	Responsibility
Martin	Fregoso	4	Responsibility
Ashley	Lightfoot	4	Responsibility
Michael	Merrill	4	Responsibility
Carolyn	Chow	5	Responsibility
Lisa	Ensign	5	responsibility
Kathy	Perkins	5	Responsibility
		Responsibility Count	11
Todd	Rivera	1	Restorative
Michael	Merrill	2	Restorative
Scott	Price	3	Restorative
		Restorative Count	3
Candace	Reines	2	Self-Assurance
Rob	Schamberg	3	Self-Assurance
Megan	Curtis	4	Self-Assurance
Linda	Fabre	4	Self-Assurance
		Self-Assurance C	4
Megan	Curtis	1	Strategic
Linda	Fabre	1	Strategic
Rob	Schamberg	1	Strategic
Patricia	Deming	2	Strategic
Jack	Bachofer	3	Strategic
Martin	Fregoso	3	Strategic
Debbie	Fry	4	Strategic
Fred	Van Vleck	4	Strategic
Scott	Price	5	Strategic
Jeff	Napier	5	Strategic
		Strategic Count	10
Yancy	Hawkins	1	Woo
Michael	Merrill	3	Woo
Greg	Rash	3	WOO
Donna	Barber	4	Woo

Woo Count

4

Thomas Killman Survey Results

			Competing	Collaborating	Compromising	Avoiding	Accommodating
Jack	Bachofer	Hollister SD	6	5	8	8	3
Donna	Barber	Riverside COE	3	6	11	3	7
Helen	Bellonzi	Pajaro Valley USD	4	2	6	9	9
Debbie	Bentley	Napa COE	4	8	3	7	7
Pam	Buckhout	Hemet USD	8	4	7	7	4
Laura	Carevic	Hesperia Unified SD	4	6	9	8	3
Megan	Curtis	Anderson Union HSD	3	5	9	8	5
Patricia	Deming	Live Oak Elementary SD	6	9	10	3	2
Lisa	Ensign	Sebastopol Union SD		4	10	9	6
Linda	Fabre	San Bernardino CSOS		8	9	7	6
Martin	Fregoso	Davis Joint Unified SD	8	6	4	8	2
Debbie	Fry	Lassen Union High Scho	4	7	6	7	5
Jennifer	Goodner	Fortuna Union High SD	4	4	7	10	5
Yancy	Hawkins	Marin COE	9	5	7	2	6
Gaby	Hellier	Byron Union SD	4	6	9	7	4
Ashley	Lightfoot	Paso Robles Public Sch	2	7	9	4	7
Michael	Merrill	Calaveras USD	5	8	11	1	5
Jeff	Napier	Del Norte County USD	9	7	2	6	6
Kathryn	Perkins	Charter Oak USD	5	8	10	5	2
Scott	Price	Glendale USD	5	6	6	7	7
Gregory	Rash	Twin Rivers USD	1	6	8	7	9
Candace	Reines	Perris Union HSD	9	6	6	7	2
Todd	Rivera	Tahoo Truckee USD	8	6	9	3	4
Robert	Schamberg	El Dorado COE	3	10	3	8	6
Fred	Van Vleck	Ceres USD	10	8	6	2	4
Carolyn Strehlow	Chow	Las Lomitas SD	8	3	6	7	6
Keith	Beeman	Chino Valley Unified SD					



Sort by top 20%

Helen	Bellonzi	Accomodating	9
Gregory	Rash	Accomodating	9
Donna	Barber	Accomodating	7
Debbie	Bentley	Accomodating	7
Ashley	Lightfoot	Accomodating	7
Scott	Price	Accomodating	7

Jennifer	Goodner	Avoiding	10
Helen	Bellonzi	Avoiding	9
Lisa	Ensign	Avoiding	9
Jack	Bachofer	Avoiding	8
Laura	Carevic	Avoiding	8
Megan	Curtis	Avoiding	8
Martin	Fregoso	Avoiding	8
Robert	Schamberg	Avoiding	8
Robert	Schamberg	Collaborating	10
Patricia	Deming	Collaborating	9
Fred	Van Vleck	Competing	10
Yancy	Hawkins	Competing	9
Jeff	Napier	Competing	9
Candace	Reines	Competing	9
Pam	Buckhout	Competing	8
Martin	Fregoso	Competing	8
Todd	Rivera	Competing	8
Carolyn	Chow	Competing	8
Donna	Barber	Compromising	11
Michael	Merrill	Compromising	11
Patricia	Deming	Compromising	10
Lisa	Ensign	Compromising	10
Kathryn	Perkins	Compromising	10
Laura	Carevic	Compromising	9
Megan	Curtis	Compromising	9
Linda	Fabre	Compromising	9
Gaby	Hellier	Compromising	9
Ashley	Lightfoot	Compromising	9
Todd	Rivera	Compromising	9

Cutoff Point:			
80% scoring & above (from test norms - not class norms)			
Competing		8	
Collaborating		10	but included a 9
Compromising		9	
Avoiding		8	
Accomodating		7	



Budget 7:00 to 9:00

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!

You will be observing his presentation and asking him questions.

Board Agenda Item

Budget Adoption

Presentation by: Bill McGuire

90 minutes presentation

Questions by the Board

Audience questions

Adoption



Your acting role

CURRENT BOARD MEMBER WHO IS KNOWN FOR BEING RATIONAL	Bachofer	Jack
CONTINUATION PRINCIPAL	Barber	Donna
BOARD MEMBER SUPPORTED BY CSEA	Beeman	Keith
BOARD MEMBER WHO USED TO BE A TEACHER IN THE DISTRICT BUT WAS FIRED	Bellonzi	Helen
FORMER RECALLED BOARD MEMBER	Bentley	Debbie
BOARD MEMBER WHO USED TO BE THE CBO OF THE DISTRICT IN 1945	Buckhout	Pam
SOCCER MOM	Carevic	Laura
INTERESTED PARENT - HEAD OF TECHNOLOGY COMPANY	Chow	Carolyn Strehlow
PARENT OF A CHILD WITH SPECIAL NEEDS	Curtis	Megan
PARENT OF A CHILD ENROLLED IN GATE	Deming	Patricia
HIGH SCHOOL MATH TEACHER	Ensign	Lisa
NEWSPAPER REPORTER (LOCAL PAPER) SEASONED VETERAN OF 6 MONTHS	Fabre	Linda
INTERESTED PARENT - opposed too school fees	Fregoso	Martin
KINDERGARTEN TEACHER	Fry	Debbie
BAND TEACHER	Goodner	Jennifer
HIGH SCHOOL FOOTBALL COACH	Hawkins	Yancy
CSEA PRESIDENT	Hellier	Gaby
CSEA MEMBER - NEW TO NEGOTIATION TEAM	Lightfoot	Ashley
ECTA PRESIDENT	Merrill	Michael
ECTA MEMBER - NEW TO NEGOTIATION TEAM	Napier	Jeff
RETIREE OF THE DISTRICT - FORMER ADMINISTRATOR	Perkins	Kathryn
CRANKY CURMUDGEON WHO WRITES WEEKLY LETTERS TO THE EDITOR	Price	Scott
INTERESTED PARENT - CPA	Rash	Gregory
INTERESTED PARENT - CEO OF A LARGE COMPANY	Reines	Candace
OWNER OF LOCAL CONSTRUCTION COMPANY WHO HAS NOT RECEIVED ANY WORK FROM DISTRICT	Rivera	Todd
INTERESTED PARENT WILLING TO RUN FUNDRAISERS TO SOLVE ALL THE PROBLEMS	Schamberg	Robert
BILL MCGUIRES BEST FRIEND PRESENT FOR MORAL SUPPORT	Van Vleck	Fred



Next class

Discuss with your mentor the topic of fiscal oversight (AB 1200) and their experiences in working with their county office.

Post a copy of your district 2nd interim approval letter from the county office (using google docs).

Talk to your mentor about legal contracts and the most important lessons they have learned over the years relative to contracts.

Interview Question: We understand the need for a reserve for economic uncertainty. However, these are definitely times of great economic uncertainty. What are the conditions whereby use of reserves to balance the budget is acceptable?



Next class

1. Prepare a 200 – 300 word summary that describes Class Size Reduction Funding in 2009-10. **Describe it as though you were including the description in a budget document. Post to google docs. Name the file with your lastnameCSR. E.g. heimCSR**

2. User Friendly BUDGET. You will receive your CD at the June meeting. Start data collection now. Don't wait until the last minute. To be submitted by the October meeting.

3. Attend a board meeting in June where a budget is being presented. Be prepared to report out about the experience. (Your district, your mentor's district, or another district of your choice)



Kevin Gordon

Budget Update

President

School Innovation and Advocacy

(Bio from SI&A website)

Widely viewed as among the top education advocates in California, Mr. Gordon is President of School Innovations and Advocacy. Along with CEO Jeff Williams, Gordon leads our company's efforts to provide the very best services available to school agencies across budget and finance, curriculum and instruction, categorical programs, human resource management, school facilities construction and education technology. The longtime Executive Director of the California Association of School Business Officials (CASBO), Mr. Gordon previously served as the Chief Lobbyist and Assistant Executive Director of the California School Boards Association (CSBA). He has also served as Chief of Staff to Congressman Robert T. Matsui and as a legislative advocate for the California Building Industry Association. He holds a master's degree in public administration from the University of San Francisco. Prior to that, while completing his undergraduate degree in communication studies at University of California, Davis, he was recruited by the IBM Corporation and