

# CBO Mentor Project Candidate Assessment

CBO  
Mentor  
Project



2007-08

*A partnership of*  
Fiscal Crisis and Management  
Assistance Team  
California County Superintendent  
Educational Services Association  
Business and Administration  
Steering Committee  
California Association of School  
Business Officials  
School Services of California

CBO Mentor Project Candidate \_\_\_\_\_ Date \_\_\_\_\_

CBO Mentor Project Mentor \_\_\_\_\_

## Mentor Recommendation:

I recommend for CBO certification.

I recommend the candidate take additional class(es), as noted, prior to CBO certification:

I have reviewed this document with my Mentor/Candidate:

Mentor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Candidate Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **Participant Application for CBO Mentor Project Qualifications**

*A successful candidate for the CBO Mentor Project should currently have or show potential in the following areas:*

Involved in some facet of school business (desirable, not required)

School finance knowledge

Career objective to become a fully qualified CBO

Computer literacy, spreadsheet software

Sensitivity to confidential issues

Logical thinking skills

Analytical abilities

Facilitation skills

People skills, ability to communicate well with others

Leadership

*Please send a copy of signed form to:*

**Dr. William Gillaspie**

**FCMAT**

**1300 17<sup>th</sup> Street – City Centre**

**Bakersfield, CA 93301**

Rating of Skills	Description	Meets Standard	Exceeds Standard	Identified As An Area of Professional Growth
<b>BASIC BUSINESS KNOWLEDGE</b>				
School Finance Basic Knowledge	Has knowledge of such items as COLA, deficits, Prop. 98.			
Ability to communicate basic school finance	Can explain COLA, deficits, Prop. 98, Governor Budget proposal in public setting.			
Analysis of Financial Reports	Able to read and understand official SACS forms and audit reports.			
Budget Development	Knowledge of how to develop a budget or ability to analyze existing budget systems in place to ensure that reliable budget data is produced.			
Ability to communicate budget data	Demonstrated ability to do a budget presentation to the school board or other like group.			
Computer literacy, spreadsheet software	Demonstrated ability to use a variety of computer applications with primary focus on spreadsheet literacy.			
<b>LEADERSHIP AREAS</b>				
Sensitivity to Confidential Issues	Understands district politics, legal communications and confidentiality of information.			
Logical Thinking Skills	Ability to reason; exhibits sound judgment.			
Analytical Abilities	Can identify problems/issues and their component parts, evaluate options, and recommend viable solutions.			
Facilitation skills	Ability to lead groups, elicit all needed information and have groups feel positive about the process and outcomes.			
Leadership	Ability to identify the "big picture"; ability to move people to take action. Collaborates well with others.			
People Skills; Ability to Communicate well with others				
<b>OPERATIONAL AREAS</b>				
Transportation	Understands transportation systems and methods. Understands routing methodology and assumptions. Knowledge of legal requirements for transportation			
Food Services	Knowledge of revenue streams for food services; legal requirements for food preparation in schools			
Maintenance and Operations	Knowledge of cleaning standards for schools; work order systems			
Facilities	Knowledge of funding sources for facilities; legal construction and bid requirements			
Technology	Knowledge of information systems in schools; use of technology in education; Erate applications			
Risk Management	Knowledge of insurance options; cost containment principles; legal requirements for insurance.			
Legal	Ability to read, understand and interpret ed codes; contracts and other legal documents.			
Health and Welfare	Knowledge of cost containment principles; methods of funding for Health & Welfare.			
Collective Bargaining	Knowledge of SB 160; fiscal aspects of negotiations.			
Purchasing and Bid Awards	Knowledge of legal requirements; options for purchasing products.			
Demographics/School Staffing				

		Meets Standard	Exceeds Standard	Identified As An Area of Professional Growth
<b>AREAS IDENTIFIED IN CBO CERTIFICATION</b>				
Accounting	This area includes the basic accounting necessary to complete all state-required forms and provide information and reports requested by superiors.			
Attendance Accounting	The area of attendance accounting includes not only the preparation of all state-required forms, but also an understanding of the intricacies of the relationship between income and student attendance.			
Auditing	Familiarization with both the state auditing requirements and methods to avoid being out of compliance are required to be successful in this area.			
Budget Development & Control	The applicant must have prepared or supervised the preparation of a district budget that has been approved by the school district Board of Trustees.			
Business Service Overview	This includes broad experience in all the areas supervised by a typical CBO, including such skills as the ability to effectively organize and manage a group of people.			
Collective Bargaining	The applicant must have prepared or supervise the preparation of materials and information as requested by a Board of Trustees or Superintendent related to collective bargaining.			
Creative Financing & Entrepreneurship	Knowledge of currently existing and any new methods of financing projects, both public and private is necessary to ensure the district has reviewed all of the known financing options available during decision-making processes.			
Facility Planning & Construction	Experience in financing, including bonding and other revenue generating methods, planning and construction of district modernization and growth projects is necessary.			
Food Services & Child Nutrition	Basic knowledge is required of the funding and delivery of food services to students.			
History of California Finance	A general knowledge of how the current method of public schools financing is developed from the passage of the revenue limit concept, SB 90 to the present.			
Human Resources/Management	A demonstrated ability and knowledge of human resources, personnel and management techniques is required.			
Information & Technology Systems	The applicant must have the ability to supervise the planning and installation of information and technology systems.			
Institution of Education	A knowledge appreciation of what teachers and administrators need to be effective at the school sites and sensitivity to those needs is necessary for appropriate decision-making.			
Leadership & Strategic Planning	An effective CBO must know and demonstrate effective leadership qualities as well as be able to develop and implement long-range plans.			
Maintenance & Operations	The candidate must be knowledgeable and have spent some time supervising a maintenance and operations department.			
Pupil Transportation	The candidate must be knowledgeable about and have spent some time supervising a pupil transportation department.			
Purchasing & Warehousing	Knowledge of purchasing and warehousing laws and practices as well as experience in these areas is required.			
Risk Management	A general knowledge of risk management principles and laws and their relationship to the welfare of employees and implications for the district are required.			
School Finance	This area encompasses all aspects of school finance needed to operate as a CBO in a typical California district.			
School Law	A broad knowledge of the California Education Code, how to access it, gain clarification when necessary, and apply the statutes to everyday decision-making is required.			