

CBO Mentor Project
Class Update - #7

To: CBO Mentor Project Participants
Cohort #4 (Fantastic 4th)

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

Date: January 12, 2008

It was great to see all of you this weekend. We missed you over the holiday hiatus.

We had an enlightening and depressing discussion on the **Governor's budget**. Remember Bills' advice...PLAN don't PANIC. At the bottom of this document is a copy of Clovis Unified message to their employees. You may find this a useful document as you prepare budget talking points for your district.

Steve Adams presented Friday night on student enrollment/projections. Steve is one of my favorite presenters because he is so passionate about the "dirty details of enrollment projections". I have no doubt that everyone in the room learned something new during Steve's presentation.

Bill McGuire (as always) did an extraordinary job this weekend. His segment on transportation was full of great information, but his unique stories gathered over his career add another dimension to the conversation.

We gave **Don Zimring** such a build up on Friday night. Both Bill McGuire and I hold Don in such high regard; we told you that our hope is to grow up some day and be like Don Zimring. And after you heard Don on Saturday morning, we knew that you understood what we were talking about. My guess is that you all will now aspire to be like Don. He covered the details of position control, the complexities of the relationship between business and HR, and the tough decisions that a CBO needs to make. But what you heard threaded through the conversation was his passion for education and his core value, which is student centered through and through.

Part of the follow up discussion on staffing was the conversation about layoffs after March 15. Here is the information we talked about during class.

- ▶ **EC44955.5.** (a) During the time period between five days after the enactment of the Budget Act and August 15 of the fiscal year to which that Budget Act applies, if the governing board of a school district determines that its total revenue limit per unit of average daily attendance for the fiscal year of that Budget Act has not increased by at least 2 percent, and if in the opinion of the governing board it is therefore necessary to decrease the number of permanent employees in the district, the governing board may terminate the services of any permanent or probationary certificated employees of the district, including employees holding a position that requires an administrative or supervisory credential. The termination shall be pursuant to Sections 44951 and **44955** but, notwithstanding anything to the contrary in Sections 44951 and **44955**, in accordance with a schedule of notice and hearing adopted by the governing board. (b) This section is inoperative from July 1, 2002, to July 1, 2003, inclusive.

- ▶ ***By the Way . . .*** (excerpt from a 2002-03 School Services Article) **Budget Trailer Bill Would Suspend Late Layoffs for 2002-03.** AB 2999, one of this year's budget trailer bills, includes a provision that would suspend the authority for late layoff notices for one year. Under current law, a school district is authorized to give layoff notices to certificated staff during a window starting five days after the enactment of the Budget Act and ending on August 15, 2002 , if a governing board determines that a district's revenue limit per ADA grows by less than 2% (ref. Education Code Section 44955.5). AB 2999, which is authored by the Assembly Committee on Budget, would suspend this authority for the 2002-03 fiscal year. This bill passed the Senate when that body passed the Budget Act and was sent back to the Assembly for concurrence with Senate amendments. This bill is not expected to move until the Assembly passes the Budget Act. Keep in mind that this issue would be moot if the Budget is enacted after August 10.

Don left us a lovely little gift – the DVD we played during lunch. The combination of the kindergarten video and the “Johnny the Bagger” story left me pretty teary-eyed.

Again – here is the website where you can purchase this.

<http://www.simpletruths.com/>

Hopefully you took away from these discussions, the delicate balance between “best business practices” and what is best for the instructional program,

principals, teachers, and students. Not an easy task, particularly when set against the backdrop of the Governors' opening budget "salvo" thrown out on January 10, 2008.

We enjoyed listening to your thoughts about "**Good to Great**". I get new insights every year when we review this book.

And interestingly enough, **Special Education** fit in well with the theme of the weekend. As you try to balance enrollment project, staffing, and instructional needs...special education is an entirely different story. Enrollment is difficult to project, costs are next to impossible to predict with any degree of accuracy, and funding keeps falling far short of expenditures.

Hopefully you took away from the presentation Saturday afternoon a better sense of special education funding, and the role of a CBO relative to monitoring this critical part of your budget.

And my presentation on Special Education cut into Bill McGuire's time on **Maintenance and Operation**. But hopefully you heard his message that our schools and their appearance are daily "billboards". The "billboard" message we want to send to taxpayers is that we are taking care of their investment in educational facilities. And our message to students and parents is that we are maintaining a safe, secure and accessible environment for all.

Below is a recap of mentor discussion, assignment timelines, and the outline for the next classes:

MENTOR DISCUSSION TOPICS

Discuss with your mentor the Governors budget as presented in January? What is their prediction for the final outcome when the budget is signed into law in July?

What is your district financial system? What was the history of the software selection process? Is there a future replacement plan for hardware/software?

Mentor discussion topic (March)

Discuss with your mentor the most difficult employee evaluation process they have gone through? Lessons learned? What would they do differently?

Ask your mentor what their favorite interview question is? Role play with your mentor a few interview questions and ask them to critique your response.

Talk to your mentor about collective bargaining. What advice do they have for you relative to collective bargaining?

Assignments due for February

FCMAT Technology Study Presentations. Hopefully you took advantage of the time provided to get an early start on this project with your team. The written part of the assigned study is:

1. Board agenda items
2. Written report to the board
3. PowerPoint presentation to highlight the written report.

Presentations should be planned for 15, 10 and 5 minutes in length.

Scope:

- Overview of the district
- Review of the findings and recommendations
- Plan to implement recommendations
 - Include budget proposal (summary and detail)
 - Personnel allocations required
 - Time line for completion and dates for milestones
 - Benefits of implementation
 - Possible risk of and to implementation
 - Participation by other district departments and school sites
 - Participation by others outside the district

Your **completed resume and application package** for a CBO position is due. Your mentor should have reviewed the materials prior to submission and provided you with input. Your package will be reviewed by School Services of CA and Carol Berg. There are two current open positions for you to choose to apply for: Chino Valley Unified and Santa Barbara School District.

MENTOR REVIEW GUIDELINES FOR THIS ASSIGNMENT (NEW)

One of the mentor suggestions was for us to provide some guidance on what they should be looking for in the assignments. These are the guidelines we will be providing to them.

The **Technology exercise** is intended to do four primary things

- Learnings from group dynamics/leadership
- Understanding about technology issues and associated implementation issues
- Preparation of written materials for a board presentation
- Public speaking skills – specifically with the ability to adapt to a 5, 10, or 15 minute presentation with NO advance notice.

We are always trying to improve writing skills and specifically appropriate use of words/language for board reports. As noted before, **Political sensitivity in written communication** to varied audiences is something that mentors can assist greatly in identifying for our future CBOs. Also, political sensitivity in public speaking is important. Any advice or insights you can provide to your mentee will be helpful.

Written report

Basic writing skills

Use of appropriate language, e.g. suggestions for use of words/tone that would be more politically appropriate

Budget documentation

Is the layout easy to read? Suggestions on how it could be more clearly presented. (e.g. small print with too much detail, data does not flow logically, not easy to read)

Are assumptions laid out clearly? Do the assumptions make sense?

TEAMS:

- A7 Jamie D, John B., MaryKay, Deanna (Orcutt Union)
- B7 Lori, Karen, Tony, Jayne (Antioch)
- C7 Katy, Greg, Douglas, Jaime (New Haven)
- D7 Melody, Gretchen, Jessica, Judy T (Elk Grove)
- E7 John S, Christina, Jordan, Judy S (Las Virgenes)
- F7 Ann, Denise, Linda, Jesse, Jeanne (Carlsbad)

Resume Review. Please give your mentee critical advice on their cover letter and resume. Your insights and analysis in this area are invaluable to them in their future career.

Schedule for Next Classes

2007-08 CBO Mentor				
Session	6	7	8	9
Friday	Nov 15-16-17	January 11 - 12	Feb 1-2	Feb 29 March 1
2:00 to 5:00	Evaluation meetings before dinner with mentor/Participants	Mid Year Evaluations		
5:00 to 6:00	Working dinner	Working Dinner - Review Staffing Exercise	Working Dinner (catch up time)	dinner
6:00 to 7:30	Presentations (food service)	Enrollment Projections (Steve Adams and Bill McGuire)	IT Best Practices (Bill Cook)	Purchasing and Bidding
7:30 to 9:00		Tech Presentations - start	Technology Presentations	Employee Evaluations
				Language of the Instruction Division
Saturday	Nov 15-16-17	January 11 - 12	Feb 1-2	Feb 29 March 1
8:00 to 9:00	Worker's Compensation (Terri Prichard - MCJPA)	Transportation (Bill McGuire)	District Issues & Negotiations (School Services)	Applying for the Position of CBO
9:00 to 10:00		Special Education (Francie)		
10:00 to 12:00	Property & Liability (Paula Tanquay-ASCIP)	Maint & Op (Bill McGuire) Good to Great		
12:00 to 12:30	Lunch - hand out good to great	Lunch	LUNCH	Lunch with Mentor
12:30 to 1:00	Feedback on presentations	Building relationship with HR & Position Control (Don Zimring)	District Issues & Negotiations (School Services)	Your first 100 days (Bill McGuire & Ron Bennett)
1:00 to 3:00	Staffing a School Department - Exercise			Graduation (end at 3:30)
1:00 TO 6:00	Mid Year Evaluations			

District wide email from Clovis Unified Superintendent, Terry Bradley

I'd like to take a few minutes of your time to answer the question that I am sure is on the minds of all of our employees: How does the Governor's January 10 budget proposal affect Clovis Unified, and how does it affect our employees?

First, the Governor's proposal included the declaration of a Fiscal Emergency in California, and an immediate cut of \$400 million to the State's K-14 budget during our current fiscal year. The good news is that this mid-year cut is not expected to impact our current-year budget allocations at the local level.

However, this initial proposal includes \$4.4 billion in cuts to California's 2008-09 k-12 education budget. If the Governor's proposal were adopted today, without any changes, Clovis Unified, along with most other school districts in California, would see a reduction in funding for 2008-09 of approximately \$140/student. That would translate to a decrease of more than \$5 million in our general fund revenue next year.

We know that in the end, public education will likely see less of a reduction than the Governor proposed yesterday. But, we also have no doubt that we are facing a budget year that will include some form of funding cuts to our school district. When the dust settles in Sacramento next summer or fall, and a State budget is adopted, CUSD and most other school districts in the state, will, in all likelihood, receive less revenue per student than this year. This would be only the third time since the mid-1970s that school districts will actually receive less revenue per student than the previous year. The other two years were 1993-94 and 2003-04.

Because we are a school district that works as a team: from the Governing Board and administration to each of our employee groups, I know that we can weather the approaching storm. Just like the times we have faced cuts in the past, we will turn to our Budget Standards Committee to review our entire budget, and to maintain our focus on protecting the high quality programs and services that make our district unique, as well as maintaining a competitive salary schedule and benefits package for the outstanding employees who each day make a difference for our 37,000 students. Although there will be budget reductions in 2008-09, I am confident that by working together we will be able to ensure that all current employees will be given the option to continue their employment with our school district.

During the next couple of weeks we will be meeting with employee groups (Faculty Senate, CUBSS and Operations, etc) to review our financial condition. Also, please be assured that over the coming weeks and months we will continue to keep our employees informed of the State's budget process and its impact on us. If you have any questions about our budget process, please feel free to call, email, or set up a meeting with me.