



CBO Mentor Project Monday Morning Letter
Class Update - #4

To: CBO Mentor Project Participants
Cohort #5

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

Date: August 24, 2008

Four down and six to go! We have said this before, but this time we really mean it...we think this was our best weekend ever.

IMPORTANT REMINDERS

**November class is in coordination with CASBO CBO symposium
Thursday, Friday and Saturday Nov. 20,21,22 in Newport Beach (details to follow)
Monday Morning ZOOMERANG Survey - complete
Mentor discussion before next class (official list below)
Assignments for next class (official list below)
Pay particular attention to the new assignment on STRENGTHS**

Friday night with **Lori Raineri and Jonathan Edwards** (Governmental Financial Strategies) was truly amazing. www.gfsi.com. Who would have thought calculating present values and future values would be so much fun. And **Joel Montero** is always entertaining. We were all wide awake at 10:00 while he dished out the Sacramento gossip and dirt. What a dynamic trio!

Saturday morning was an engaging hour of activity as you all put your creative talents to work explaining the algebra of unfunded COLA/deficits. Bill McGuire has always taught you that you don't have to invent everything yourself and to borrow the best work of other people. You can be sure that he will put that into practice and some of your concepts will appear in the SI&A budget workshops, with proper credit given to your great work.

We managed to get in a **little bit of basic accounting/financial reporting** on Saturday; covering SACS accounting and the importance of telling your story. We will come back at our next session and talk about carryover and deferred income and how that impacts your financial reports. Your favorite line on the financial reports is now the same as Joel, line E, all income sources less all expenditure sources (unrestricted change in fund balance).

The **leadership exercises** were thoughtful and well done. We will treasure the memory of “RESPECT”. Especially the last part when in a display of support and true teamwork, another team intervened to help you spell RESPECT.

Your financial reports were the BEST we have seen to date in all our classes. Class #5 is definitely “raising the bar”. Of course, you have an advantage over the prior classes; because they have given us so much input on how to improve our teaching.

MENTOR DISCUSSION TOPICS

Discuss with your mentor their tips for a successful budget presentation. What advice would they give you regarding budget documents? Budget presentations?

What health and welfare benefits does your district offer? Medical, dental, vision, life insurance, EAP, other? What are the costs? Who are the providers? Do you have a benefit cap? What does the contract language say? Talk to your mentor about caps on benefits and the various ways in which they might work in contract language. Bring to the class your contract language relative to benefit caps. Be prepared to talk about your benefits costs and benefit caps.

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.

Assignments

1. **Refresh yourself on your strengths (included at the end of this letter). You can expect a quiz from Mr. McGuire at the next meeting. Take a look at the strengths of your teammates from your last project. Be prepared to report out some insights about your team group dynamics as it relates to the different strengths of the group.**
2. Prepare a board summary report of your district prior year actuals. This report should include:
 - Spreadsheet summary of variances from last information told to board and final information at year end with narrative explaining the variances
 - Documents to look for:
 - 2008-09 Budget to board – find 2007-08 estimated actuals from this document
 - 2007-08 Actuals (September 15, 2008 document)

If you do not have a district, request your mentor's assistance in finding a suitable district for analysis. Finished assignment due – October 17, 2008 to submit electronically to instructors.

End of year variance analysis due to your mentor by September 30 for mentor review and input. The variance analysis will include a narrative and a summary financial document. The template for the financial report was sent out after the last meeting. Mentor review should be done and rewrites finalized by the October meeting. Mentors are asked to pay particular attention to the narrative and provide input that makes the document "board package ready." Your rewritten assignment is due at the October meeting.

3. User Friendly BUDGET. CD provided. Your job is to complete the User Friendly Budget. Complete all sections of UFB 6.2 for the District/COE of your choice. Review and discuss with your mentor prior to the class. Be prepared to report out in TWO minutes and two minutes only what you learned about budgeting in CA using UFB during dinner on October 17, 2008. Bring one copy to the class.

Thanks to Christine for pointing out a good resource for prior year data;
<http://www.ed-data.k12.ca.us>

4. Attend a JPA meeting (workers compensation/property & liability/health and welfare) – not due until September but if you want to get an early start – go for it!
5. Attend a Collective Bargaining session (not due until November)
6. Early Birds – get working on your resume (due in January)

FUTURE MEETING SCHEDULE

	4	5	6
	August 22 & 23	September 12 & 13	October 17 & 18
5:00 to 5:30	Dinner/greetings		
5:30 to 7:30	Debt Financing (Lori Raineri)	financial Reporting (Francie) Budget Development (Bill M)	Building Relationships with HR/Position Control (Don Zimring)
7:30 to 9:30	Staying out of Trouble /What's ahead in these Difficult Budget Times? Joel Montero		
	Saturday		
8:00 TO 10:00	Financial Reporting (Francie)	Medical Benefits (Teri Ezaki)	Annual Audit (John Goodell)
10:00 to 11:00	Leadership laws	Budget Development (Bill M)	Facilities A to Z (Eric Hall)
11:00 to 12:00	Financial Reporting		
12:00 to 1:00	Lunch/Financial Presentations		
1:00 to 1:30	Financial reporting (Francie Heim)		
1:30 to 2:30	Leadership		

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

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.

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	Accomodating	8	1
Deaton, John	Accomodating	7	2
Manansala-Smith, Roslyne	Accomodating	10	2
McCoy, Mark	Accomodating	7	2
Statton, Christine	Accomodating	7	2
DeGeyter, Julienne	Accomodating	5	3
Sepulveda, Richard	Accomodating	6	3
Cunnane, Kathy	Avoiding	8	1
DeGeyter, Julienne	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, Julienne	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