

Greetings Mentors!

Mentor discussion topics:

- 1. Discuss with your mentor the topic of fiscal oversight (AB 1200) and their experiences in working with their county office.**
- 2. Bring a copy of your district 2nd interim approval letter from the county office.**

(from April/May - but we will revisit again in June):

- 1. Discuss with your mentor what they think is the role of a CBO and the qualities they feel are critical to be successful.**
- 2. Discuss your strengths and the strengths of your mentor.**
- 3. 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.**

What is your district revenue limit?

- 1. Discuss with your mentor where your revenue limit is in relationship to the state wide average for your type of district.**
- 2. 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.

Assignments:

- 1) Select an income topic for your written paper. Discuss the selection with your mentor. (see handout from Friday night for details)
- 2) Come prepared (next class) to talk about the reading assignment noted above (John Mockler's speech versus the Governor's speech)
- 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)
- 4) Leadership workbook assignment (from Bill McGuire) provided at lunch on Saturday (see details in the spiral bound book provided Friday night).
- 5) 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!

June Class:

Friday night is an action packed evening of stories of fiscal solvency and insolvency. Wendy Benkert ,Assistant Superintendent Orange County Office of Education, will share her perspective on county office fiscal oversight responsibilities.

Straight from the horses' mouth so to speak...Joel Montero will regale you with stories of what **not** to do as a CBO. Joel brings a wealth of knowledge, history and expertise to this topic. A "must" session for future CBO's.

Plan on lots of caffeine for Saturday! Francie will be spending most of the day talking about financial reporting basics for a CBO. But there are some fun exercises with some real life district experiences involved. It is an ambitious schedule for the day and whatever information we don't cover will carry over to the September meeting.

We will also have two hours of riveting conversation about legal issues and contracts - a not to be missed session!

Thank you, Mentors, for your commitment to this excellent training program! We really appreciate you sharing your time and expertise!

Mary Turcotte, Mentor Coordinator