CBO MENTOR WORKSHOP
Sept 12 &13, 2008

Survey results.

How would you rate Fridays "Financial Analysis" session?

Unsatisfactory		0	0%
Poor		0	0%
Average		2	10%
Above Average		6	30%
Excellent		12	60%

Please give us examples on how we can improve the "Financial Analysis" session?

No Response
No Response
very easy to follow the way it was presented.
really good information...
I actually liked having this split up only because it gave people like me (not from finance) another opportunity to tackle financial reporting. I also appreciate the placement of a “financial” person at my table each session.
It was Great
Using real examples works well - you have been choosing examples that have unusual situations which shows how challenging this process can become.
I'm not sure this comment will help make improvements, but the doing an analysis purely on the SACS forms shows how little you know without some document that tells what the story really is. The rest is an educated WAG.
No Response
No Response
No Response
I like doing the financial analysis and then discussing. It makes you aware of the variety of issues you can not identify without asking questions
Possibly have each participant bring their own budget in and, after walking through the deferred income exercises, have us related it to our own budgets. I think I got it but need to relate it to our budget.
No Response
I liked that it was split up between several sessions. Maybe planning smaller sections of it so it is not so much at one time.
No Response
No Response
No Response

Overall, I enjoyed the whole "Financial Analysis" section. It's provided me more tools to use in analyzing financial data.
No Response

How would you rate Friday's "Budget Documents and Presentation " session?

Unsatisfactory		0	0%
Poor		0	0%
Average		1	5%
Above Average		8	40%
Excellent		11	55%

Please give us examples on how we can improve the "Budget Documents and Presentation?" session

No Response
Good ideas to make the budget document more meaningful to the end users. Thanks. I'll get working on a new cover!
Comparison of the good and the bad is good.
really good information...
Great session
Great Ideas
I really like the exposure to the different resources
Not a comment for improvement, but I found the inclusion of how others present their data to be useful. It helps to have insight and ideas on how other LEA's are interacting with the board and the public.
No Response
No Response
No Response
You had some really good examples of report covers. You have each presented some really good spreadsheets as well. It would be nice if you had an on-line library where we could browse these items at our leisure for our own presentations.
Give us some time to take the information presented and select which item we feel would be good to include in our presentation and which will have to wait. Think about it while it's still fresh.
Very good nugets of information presented
I would like to know more about what we should include on our websites.
No Response
No Response
No Response
This section gave me more ideas in what needs to be included when presenting budgets
No Response

How would you rate the Saturday"Health and Welfare" session

Unsatisfactory		0	0%
Poor		0	0%
Average		4	20%
Above Average		5	25%
Excellent		11	55%

Please give us examples on how we can improve the "Health and Welfare" session.

There was a lot of great and useful information in the session. I think it was tough so early in the morning to absorb it though. I would recommend either putting the session in the middle of the day on Saturday or adding some features to get people up and moving.
Perhaps some info for folks that are in a fully insured program like CalPers. Philosophy on cash in lieu...
Maybe a case study of some sort for actual hands on work and comparison of plans.
Excellent
Lots of very useful information. I especially liked learning about using copays to influence employee behavior.
A little more details.
This was a PACKED presentation - I don't think you could add any more
Bring Terri back every time. I have already given her card to Linda (my boss) to see if we can't include her in our health care reviews. Loved her disposition (she doesn't need any coffee!).
No Response
No Response
I thought that Teri was a great speaker, who obviously has a wealth of knowledge in her field. One topic that might be helpful to dive in a bit deeper would be the benefits of having benefit caps, self-insured, etc. I do believe we did touch on this, but just going over some of the pros and cons.
It was very good information but difficult to digest it all in that short amount of time.
None. Great information that filled in some gaps for me.
Defined too many terms in general. How about looking at specific policy issues as to effects on coverage and cost. What can we do specifically do to maintain close to the same coverage but nudge up the deductables, where do we get the best bang for the buck? Overall I thought it very benifical.
Include an interactive exercise. Maybe waiting to report out our districts benefits structure during this presentation
No Response
No Response
No Response
Terri's presentation was very informative. It would help if there was a glossary of acronyms as she used a lot of them in her presentation.
Almost needed more time. Terri was very good.

How would you rate Saturday's "Budgeting in California" session?

Unsatisfactory		0	0%
Poor		0	0%
Average		3	15%
Above Average		3	15%
Excellent		14	70%

Please give us examples on how we can improve the "Budgeting in California" session.

Good information and particularly useful at Budget Director right now. I would think about presenting it in a way that gets the info to stick. How about "Important Budget Indicators..." or "Key Indicators of the Budget"?
Lots of good tips on presenting information. Bill- you need to change your x&y axis labels on page 148.
Alot of good information but was presented very quickly which I realize was to keep up the attention span of the group.
learned some new resources and methods for budgeting
This session was less painful than I anticipated and truthfully, I only once thought of a dose of morphine and the sweet release from reality that it would bring. All seriousness aside, this was one of the better presentations to date. I took away a lot of useful information on developing and presenting a presentation that will surely benefit me down the road.
Bill was great. This session was perfect, as it built upon the earlier sessions and put it all into perspective. The constant theme of repsonsiblity of budget was revealed.
Still looking for a better method to fund the state - any ideas?
Although a dry topic, great information. If anything, try to create more interaction - I have to admit my head "bounced" once or twice - to keep students engaged.
No Response
No Response
Bill does a great job in breaking down budget development. The only comment I have here is to maybe give some suggestions on how a CBO in a small district might be able to do all the work necessary for budget development. Maybe even, what they should focus on if they just don't have the staff to get all the detailed information?
Lots of good information and tips but it is just dry stuff. I think when you find ways to involve us it works a lot better
Very useful information. I just ran out of steam near the end.
Bill, way too much info to cover. I understand the point of building a better budget. Maybe point out 10-15 things CBO's can focus on in a budget to see that it is built better. Its difficult to follow a 200 page presentation. I enjoy you stile and understood what you were talking about, but I am sure that the folks from MOT or Technology missed a lot of what you said, as they have not had any exposure to this. Not sure how to make this relevent for my type and information for the others. I do get and expect to pick up several nuggets of information each meeting. I think some indepth discussions on some of the big issues is needed. A lot of scholls thought about abonding CSR this yr. Maybe go through the thought process and how to analyze a district to see if it benefits. Also the Option 2 on the K's, I never understood it before (I can not use it) but others can and should, John D. (AKA Mike)'s district can use this but I do not think John understood its relevance. *My wife is a principal in there District* I sent there CBO a note with the Clovis time sheet for the K Teachers from your presentation. Just items like this that a lot of people know about, but it is not published anywhere for those of us who do not.

It was great. I did not find it as boring as you said it would be. I really learned a lot and am excited to use some of your examples at my district
No Response
All of the excel spreadsheets were great, anyway that we can get a copy?
No Response
Having group discussions was a great idea in between topics.
This included so many good budget ideas...I wish I had heard much of it two years ago when I started my position.

What is your overall rating of this session?

Unsatisfactory		0	0%
Poor		0	0%
Average		2	10%
Above Average		5	25%
Excellent		13	65%

Please give us your comments on how can we improve the overall session.

No Response
Your energy and wealth of information is amazing- much appreciated!!! Thank you.
No Response
thought the resources (links) that were provided are excellent...Thanks!
I am really enjoying the program and I feel that each session is getting better and better.
N/A
Another great session!
No additional comments....
No Response
No Response
No Response
Ithink creating more opportunities for the attendees to interact amongst themselves and with the presenter really helps. Especially durring months like September where we are noticebly run down.
Again, I was impressed with the different ideas each of the members at out table brought to our group sessions. Possibly share a bit about budget presentations in each district so we can steal some ideas, if needed. Also, maybe save a few minutes at the beginning for anyone to share an issue they are dealing with to get some ideas on solving it. I've done this a bit and it has been very helpful. The presenter was, again, great and so was the weekend. Thanks.
No Response
Serve two different meals. I liked dinner but was not as excited about eating it again for lunch.
To be honest, I'm not certain that I am a good judge of material for this past weekend. We've been working 16/7 (literally) for weeks, and it's really starting to catch up to me. I think I may have simply been too exhausted to fully appreciate the material as well as I usually do. Bottom line, this week my ratings probably reflect myself, rather than the session (in which case I should probably put 'Unsatisfactory'!) Hopefully next time I'll have my A game . . . :-) thanks
No Response

No Response
Overall, the session was great. I enjoyed the topics.
This is the material that I love! Given our time constraints, I'm not sure it could have been improved.